

# Career and Employer Engagement Technology Report and Recommendations

DECEMBER 4, 2019

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# 1 Executive Summary

This report is a culmination of a set of activities conducted from June 2017 through November 2019 to inform a regional model for career and employer engagement and to develop recommendations for its implementation. Working closely with the leadership of the San Diego and Imperial Counties Regional Consortium (Region), the Work-Based Learning & Job Placement Workgroup, and the Employer Engagement Workgroup, WestEd conducted extensive research and stakeholder engagements to inform the recommendations contained in this report.

## 1.1 Report Context

In 2017, the Region engaged with WestEd to address the need to develop an infrastructure and processes for a regional system that would provide all 10 of the San Diego and Imperial Counties colleges with access to programs to support students in preparing for future careers and acquiring employment upon completion of their programs of study. The goal was to design a system with three key functions:

1. proactive career planning and career preparation, including the development of 21st century employability skills;
2. proactive, case-managed job placement; and
3. an online management system that provides for student tracking of progress, benchmark intervention, and documentation of all services provided, including job placement.

Ultimately, the system would allow students to transport their career plans among the colleges, access regional career exploration and internship opportunities, develop the work readiness skills required by employers, get help to find a job in their field, and have the skills needed to navigate their careers over time (Fifth Pillar report, p. 1).

The work completed in this first phase, included the development of a regional framework for student success called *A Community College Student's Road to Success* (see Figure 1 and Appendix A). This framework has guided subsequent planning and implementation activities.

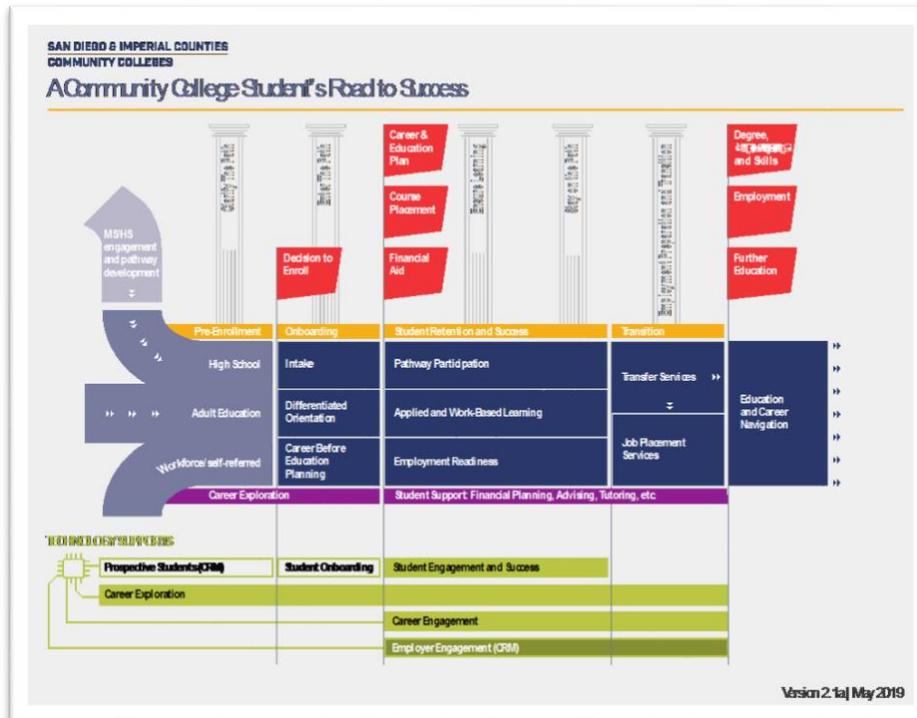


Figure 1: A Community College Student's Road to Success

Since then, the work has focused on implementation of the recommendations developed during Phase 1 of the project and the vision of the Road to Success. Early in 2018, workgroups were organized around subsets of recommendations and each workgroup developed goals to address the recommendations of the group. Goals relevant to this report include the following:

#### Work-Based Learning & Job Placement Workgroup

- Assess work-based learning opportunities and 21st century employability skills currently used in SDIC community colleges.
- Build an infrastructure to support expanded work-based learning opportunities across the region.
- Build an infrastructure to support expanded job placement services across the region.

#### Employer Engagement

- Design and implement regional employer engagement strategy.
- Implement streamlined and coordinated processes for a single method of employer engagement.
- Increase WBL and employment opportunities for students.
- Establish comprehensive documentation of KSAs required for occupations within each sector.

## 1.2 Statement of Need

Tying all these goals together is the desire to establish a system supported by technology that streamlines processes and interactions between students, college staff and faculty, and employers (for a description of the model, see section 1.3). To inform the design of this system, additional research, interviews, and other engagements with stakeholders including employers were completed and a set of needs or concerns about current practice emerged. For example:

1. Employers want a single point of contact for all colleges.
2. If a faculty member with established employer contacts leaves, there is no continuity in those relationships, the connections are lost.
3. There is a need to increase the number of employer contacts, including those with small businesses.
4. Students need opportunities beyond their own college's relationships with employers.
5. There are many roles and responsibilities within the region and at the colleges that intersect (e.g., Regional Directors and Job Placement Case Managers), but there is a lack of transparency and/or understanding of one another's roles.
6. Data and information are collected and maintained in a multitude of ways leading to duplication of effort and opportunities lost. Therefore, there is a need for a central repository to store and manage.
7. Collecting data for planning and reporting purposes is difficult (e.g., WBL activities).
8. When a student attends more than one college or transfers from one college to another, their information needs to be portable.
9. There is inconsistent access and implementation of WBL opportunities for students within a given college and across colleges. The opportunities depend on faculty, program, and college.

Need centralized coordinated effort for managing WBLs including internships across campus...with streamlined processes it would allow more students to participate in WBL experiences.  
CE Dean, Interview, Fall 2018

Employer comments during July 2018 engagement session

- Assessing skills of candidates is a challenge.
- It would be helpful to have a database to match skills and expertise.
- A system or tool should allow students and industry to communicate.

## 1.3 Regional Career and Employer Engagement Model

Through a series of workgroup and planning discussions, a regional employer engagement model emerged (see Figure 2 and Appendix B). This model represents an ecosystem of staff, partners, and stakeholders that links regional employer engagement activities through Regional Directors and the Director of Strategic Partnerships with career engagement activities at the community colleges through the Work-Based Learning (WBL) Coordinators, Job Placement Case Managers (JPCMs), and faculty and other staff. The system is supported by technology to improve communication, increase opportunities for students, and streamline processes regionally and at each college.

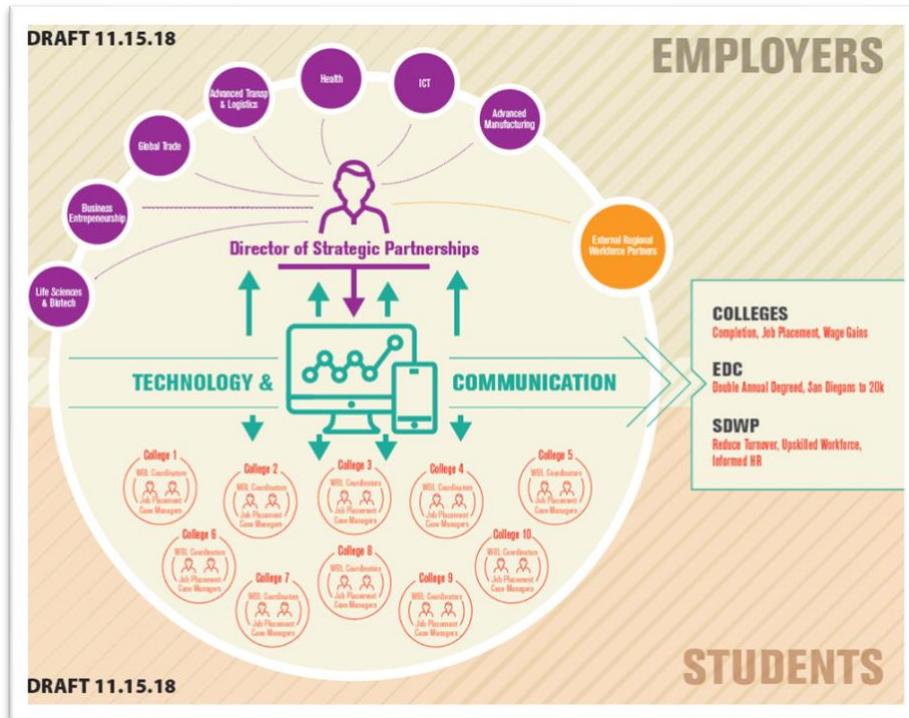


Figure 2: Regional Career and Employer Engagement Model

## 1.4 Research Highlights

Section 2 of this report contains extensive detail about the research conducted to inform the implementation recommendations described in section 3. Here we provide a high-level summary of the research activities conducted since the beginning of the project. These included:

- Extensive research through demonstrations, client interviews, and tool evaluations in fall 2017 to recommend a product to support the career and employer engagement model. At that time Jobspeaker was identified as the most viable product to meet the needs specified at the time.
- Pilot with three colleges of Jobspeaker (a fourth college began the pilot process but did not complete due to staffing availability issues).
- Research to recommend a CRM to support employer engagement model.
- Second round of research including demonstrations, client interviews, and tool evaluations in fall 2019 to refresh the findings of the research conducted in fall 2017 and inform the final tool recommendation.

This research was supported by other data collection activities, including:

- A work-based learning survey administered at each college.
- Interviews with all the CE deans and stakeholder focus groups.
- Regular engagement with the WBL & Job Placement Workgroup and the Employer Engagement Workgroup.
- Regular engagement with the WBL and JPCM Community of Practice members.
- Facilitation of structured convenings to develop process maps.

## **1.5 Career and Employer Engagement Tools Recommendation**

Based on the research conducted over the past two years, the recommendation is to adopt and implement two technology platforms and connect them via API, creating one coordinated system that addresses the employer and career engagement goals of the region and colleges. The first is a CRM to facilitate and support employer engagement activities at the regional level. The second is a tool to facilitate and support career engagement activities at the college level. A single software tool utilized by all colleges in the region presents a number of benefits, including ease of data sharing (for employers and opportunities), the ability to report on activities regionally, consistency for employers, and equitable access for students in the career preparation and placement tools available to them.

### **1.5.1 Adopt HubSpot**

To support strategic employer engagement and the development of relationships with new employers, the HubSpot CRM should be adopted to support a limited number of users and applications, notably those related to Regional Directors, detailed in section 3.4.3.3. See section 3.4.1 for implementation recommendations related to HubSpot.

### **1.5.2 Adopt Jobspeaker**

In addition to the CRM, it is recommended that the region invest in a single software solution to address career engagement functionalities. The findings of the Jobspeaker pilot and research into other career engagement options indicate that Jobspeaker would be a viable option to support regional employer engagement and case management of WBL and job placement. While other career engagement tools (see section 2.1.4) provide similar case management, job board, and career preparation features, Jobspeaker's proof of concept for the regional hub, its unique skills-based functionality, and its comprehensive approach to meeting multiple user requirements put it in a position to best address regional goals. Further, there is an important advantage in the company's willingness to adapt and enhance their product to meet the needs of the region, as processes, agreements, and related specifications at the college and regional levels are still under development. See section 3 for implementation recommendations, related to Jobspeaker.

### **1.5.3 Connect HubSpot and Jobspeaker via API**

HubSpot and Jobspeaker will need to share employer data to work effectively. A bidirectional API (Application Programming Interface), a software intermediary that allows two applications to talk to each other, should be developed in consultation with both vendors to meet the specific requirements developed by the region. See section 3.4.1 for implementation details.

## 2 Research into Career and Employer Engagement Tools

This section of the report describes the various research activities, findings, and products resulting from the work. Research was conducted in phases and involved a variety of methods, including:

- Stakeholder engagement through interviews and surveys
- WBL & Job Placement and Employer Engagement workgroups
- Workforce Development Council engagement
- Implementation Committee meetings
- Technology research including in-person and virtual meetings with vendors, demos, online research, and interviews with existing clients
- Piloting technology solutions

### 2.1 Research Activities

#### 2.1.1 Tool Selection Research (June – December 2017)

The first phase of the San Diego and Imperial Counties Strong Workforce Project focused on a thorough analysis of needs and challenges across the region and established the following priorities:<sup>1</sup>

1. *Rigorous applied and work-based experiences for all.* Offer rigorous applied, project-based, WBL experiences through classroom instruction, giving all students the opportunity to learn and practice the 21st century employability skills of collaboration, communication, critical thinking, and creativity (among others) in addition to technical skills.
2. *Continuum of work-based learning for all.* Provide all students with access to a continuum of career exploration and work-based learning experiences throughout their college tenure, linked to coursework when possible.
3. *Regional approach.* Take a regional approach to employer engagement, to streamline contacts for employers and maximize access to opportunities for students.
4. *Coordination with faculty to support and expand upon employer contacts.* Develop processes that allow faculty to maintain connections with employers with whom they have pre-existing relationships — especially with smaller, local companies — while leveraging collegewide and regional resources to expand upon faculty connections.
5. *Comprehensive and coordinated employment preparation and job placement.* Facilitate transitions to employment by providing comprehensive employment preparation and employment advising and job placement services that are coordinated with career planning functions, pathway (technical) instruction, and delivery and assessment of WBL experiences.

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<sup>1</sup> The related recommendations are detailed in *The ‘Fifth Pillar’: The San Diego and Imperial Counties Employment Readiness and Job Placement Services Project Report*, which may be accessed on the [Regional Consortium website](#).

6. *Staffing for employment preparation and job placement.* Provide adequate staffing for the employment preparation and placement functions, while leveraging technology and community resources, to ensure that students are receiving the needed support.
7. *Tracking and dissemination of employment data.* Make student employment-related outcome data available to faculty and staff for program improvement purposes and to outside stakeholders as a means to showcase student successes and bring visibility to the importance of career and employment services.

In addition, a set of technology-related recommendations were made to support implementation of these recommendations, which included:

1. Endorse the adoption of WBL learning and job placement technology that will serve all students and employers in the region.
2. Employ technology to support students' access to career exploration and applied WBL opportunities linked to their pathway curricula; pilot existing and proposed tools before adoption.
3. In partnership with business and industry, employ technology to support students' access to jobs and to facilitate job placement services. Pilot existing and proposed tools before adoption.

To support these recommendations, during Phase 1 of the project, technology use, needs, and solutions were assessed as they relate to the implementation of a comprehensive system to support student success. Part of this work involved engaging with stakeholders, including students, via interviews and focus groups to develop a set of desired features and related requirements (e.g., interoperability with existing systems; ability to address regional implementation needs). The work also involved review of best practice research. Results of this research and engagement led to the development of a 60-point evaluation rubric. The rubric included elements in the following categories: Company Background & Overview, System Features, Accessibility & Usability, and Technical Considerations.

The first stage selection criteria included basic prerequisites and functionalities and surfaced seven finalists, which included two tools currently used by the colleges. After conducting vendor meetings and interviews with their respective, current clients, the finalists were evaluated through use of the 60-point rubric. Of the seven finalist tools assessed, Jobspeaker scored the most points overall in the career engagement evaluation. Jobspeaker met most of the requirements in the System Features category and reviewers were most impressed by the feedback of existing clients interviewed (Bakersfield College and Cerritos College) regarding the company's responsiveness in adapting and improving their product to meet the changing needs of California community colleges. Clients also had favorable feedback on the company's implementation support and overall customer service.

### 2.1.2 Jobspeaker Pilot (January 2018 – October 2019)

Building on the Phase 1 recommendations, a technology pilot was designed for Jobspeaker to address how technology can support the implementation of WBL, Job Placement, and Employer Engagement goals of the Work-Based Learning & Job Placement Workgroup. Goals included:

1. Staffing for WBL and job placement functions at each college
2. Consensus on a definition of WBL and the types of WBL opportunities to be included
3. Establishment of need for WBL and employment services
4. Establishment of implementation goals across the region, with regard to both quantity and quality of experiences, based on the assessment and drawing on best practices
5. Development of process maps in coordination with technology implementation at technology pilot sites
6. Piloting or expansion of implementation at each college based on appropriate points of departure, as identified in assessment and based on a goal-setting process
7. Professional development completed to expand implementation of WBL
8. Pilot implementation of WBL tool to provide a single point of contact for employers and facilitate placements

The pilot also aimed to inform the following Employer Engagement and Job Development goals of the Employer Engagement Workgroup:

1. A regional employer engagement plan that addresses both regional and local needs
2. Expanded WBL and employment opportunities for students

The initial evaluation of Jobspeaker was based on product demonstrations, meetings with the vendor, interviews with existing clients, and access to a “sandbox” website for exploring the system directly. While this gave reviewers sufficient information to evaluate it against other products’ features, the Jobspeaker pilot intended to evaluate how the tool would work in practice at a college, document implementation considerations, and determine how it would support the regional processes as they were developed. The pilot aimed to answer these key questions:

1. What gaps exist at the college related to promoting and managing employer engagement for WBL and employment opportunities and how can technology address those gaps?
2. How can technology support students (and faculty and staff working with students) as they engage in WBL, employment preparation, and employment placement activities?
3. How can technology be used to facilitate a regional approach to employer engagement and the promotion of WBL and job opportunities for all students?

Four colleges participated in the pilot:

- San Diego Mesa College
- San Diego Miramar College

- Palomar College
- Southwestern College (limited participation due to staff changes)

Colleges developed pilot committees and plans for how they would use the software during the pilot. Each college was given a software license for their own college-specific installation of Jobspeaker. Committee members were trained on administrative and other tools and worked with the Jobspeaker account manager and technical staff to install and configure the software to meet the requirements at each college. This included branding the sites with logos/colors, setting configurable options such as WBL processes and terminology, and loading the course data and associated skills for the programs that would be involved in the pilot.

Pilot committee members explored the system and provided feedback to WestEd and to Jobspeaker prior to engaging with students and faculty. Representatives from the four colleges also formed a user group to share information and coordinate regional pilot and data collection activities.

#### Focus of Each Pilot College

**Palomar College** designed their Jobspeaker pilot around two sets of activities:

- Exploring how the system could support the workflows for the Service Learning and Cooperative Work Experience programs
  - The Cooperative Education Department piloted the Jobspeaker Work-Based Learning module in several 8-week Cooperative Education classes. Fourteen (14) students participated in the pilot.
  - The college tested workflow management tools to support requirements for Cooperative Education, including adding the information about their course (e.g., Contact Information), adding their proposed learning objectives, and reporting hours completed.
  - Students provided feedback via an online survey during the exit interview for the course.
  - The faculty member provided feedback via written summary and interview.
- Ease of use for profile development and job placement tools
  - A classroom activity was completed in the Diesel Technology Program in which students created their online profiles, including adding courses completed in Diesel Technology to display the associated skills attained.
  - Students provided feedback via survey on ease of use and value of the tool.
  - The Job Placement Case Manager provided feedback via interview.

**Mesa College** focused on evaluating and making recommendations for the online workflow for Work-Based Learning opportunities and participation. Additionally, the college designed and conducted a series of workshops with faculty and students to gather feedback on ease of use and value.

- Faculty participants explored the system using a set of prompts and provided feedback on usability and utility. They were also asked to explore the SLOs in their courses and make revisions to support an accurate view of the skills, as these would populate student profiles.

- Student participants also explored the system and provided feedback on the different modules they explored.
- Feedback from both groups came in the format of written notes and Q&A sessions.
- Feedback from pilot committee participants was generated by written feedback and through interviews.

**Miramar College** explored Jobspeakr with a diverse group of campus users, including the JPCM, the Career Center Coordinator, the Alumni Engagement and Career Ambassadors Coordinator, and the WBL. Pilot committee members assessed the system from their perspective and provided feedback on how it could support their roles. The college also participated in the regional coordination testing project (see section 2.2.2.3 below).

The most substantive use of Jobspeakr at Miramar was by the JPCM, who used the system to conduct case-managed job placement activities for students in the Diesel Technology and Child Development programs. Additionally, staff at the college evaluated Jobspeakr as a tool to support career center activities (including use of the events module) and alumni engagement activities. Feedback from pilot committee participants came from written feedback and by interview.

#### Pilot User Group

Additionally, the Jobspeakr User Group, comprised of two representatives per college, met monthly to provide feedback to WestEd and to Jobspeakr staff. The User Group shared recent pilot activities at each college and helped define pilot priorities and next steps. The User Group aimed to address the following questions:

- How does the software meet the needs of the college as experienced through the focus areas and features explored?
- What features are not present but necessary?
- What, if any, IT requirements must be considered for fuller adoption of the product at the college?
- Does Jobspeakr help facilitate regional employer engagement practices as they are developed through the WBL & Job Placement and Employer Engagement Workgroups?
- How would Jobspeakr need to be configured in order to support regional employer engagement practices?
- What governance process will need to be developed to address regional employer engagement practices?

The evaluation of the Jobspeakr software was completed through the completion of pilot colleges' activities and related data collection efforts, meetings with Jobspeakr staff, and through the Bakersfield College "Field Trip," a virtual interview with Stephanie Baltazar, the Student Employment Program Manager at Bakersfield College. Bakersfield College launched Jobspeakr in 2016 and shared their implementation experience and advice to a panel of participants in the region.

### **2.1.3 CRM Research (February – August 2019)**

In support of operationalizing the Regional Employer Engagement model, the desire for a new tool emerged that would be utilized by key roles in the model, including the Director of Strategic Partnerships (DSP), the Regional Directors (RD) of the priority sectors, and a primary contact at each of the 10 colleges. This smaller audience of users had a desire to use a Client Relationship Management (CRM) system to track the development of employer relationships, manage responsibilities, tasks, and timelines, and document contacts and communication within a process management system. Access to the CRM would be limited to designated personnel, and data would then feed into the more broadly available career engagement tool, once the employer relationships were mature.

To facilitate this request, a separate technology assessment was conducted. An evaluation rubric (see Appendix C) was developed based on stakeholder feedback and reviewed by Workforce Development Council members. The rubric identified required features, with special attention given to the ability to customize, and the ability to connect with the selected career engagement tool.

Three CRM technologies were identified for review by the DSP, RDs, and colleges because they were already in use in the region (i.e., B2B Engage); had good word of mouth and an accessible trial version to test out (i.e., HubSpot); or because colleges were engaged in their own product demos with the vendor (i.e., Launchpad). The products were reviewed via vendor meetings and product demonstrations. See Appendix D for product dossier.

### **2.1.4 Revisit of Career Engagement Tools (September – November 2019)**

With technology options and regional implementation goals evolving since the Phase 1 evaluation, some deans and pilot participants recommended that the landscape of career engagement tools be revisited to ensure that Jobspeaker was still the best solution for the region. A subsequent evaluation was conducted in the fall of 2019 to document the most recent updates to leading tools, including those currently used by the colleges (see Table 1 below). Staff not involved in the first round of tool evaluations or the pilot conducted this revisit to ensure objectivity of the findings. See Appendix D for product dossiers.

A revised evaluation rubric (see Appendix E) was developed through the WBL & Job Placement Workgroup and reviewed by the Workforce Development Council. It includes updates to the lists of feature requirements and revisits the original priority areas to make sure they still accurately reflect the goals for the region.

Vendor meetings and product demonstrations were completed to document the products' current features and implementation considerations. When possible, an existing client reference was interviewed for each product.

Tools re-evaluated from Phase 1 with updated information included:

- GradLeaders
- Jobspeaker
- Launchpad
- Symplicity

New tools evaluated and not part of the original review, included:

- Handshake
- Purple Briefcase

College	Career Engagement Software in Use
Cuyamaca	College Central Network
Grossmont	College Central Network
Imperial Valley	College Central Network
MiraCosta	GradLeaders (JAIN)
Palomar	<i>None</i>
San Diego City	College Central Network
San Diego Continuing Education	<i>None</i>
San Diego Mesa	College Central Network
San Diego Miramar	College Central Network
Southwestern	Home grown Access Database

Table 1: Current Career Engagement Software Use in the Region

Evaluators attempted to include College Central Network (CCN) in this re-assessment, as 6 of the 10 colleges in the region use CCN to various degrees. Unfortunately, the vendor did not respond to multiple requests for a meeting and demonstration.<sup>2</sup> Impressions from the first evaluation were that the tool is an older, inexpensive product that appears to meet most of the case-managed job preparation and placement requirements but without an engaging student user interface. At the time, current college users lacked enthusiasm for its use and tools in CCN were reported to be underutilized. Additionally, CCN offered no possibility of integration with other systems, which would be a significant challenge in implementing recommended regional processes in support of the regional model for career and employer engagement (see Figure 2). In a subsequent technology survey conducted in 2018, Miramar reported that they used a number of other systems in addition to CCN (e.g., Indeed and Glassdoor) to facilitate WBL and job placement activities. In Mesa’s survey response, they noted they were exploring using Portfolium’s job board. The underutilization of CCN was reported still true by Miramar and Mesa during interviews conducted for the Jobspeaker pilot evaluation in fall 2019.

<sup>2</sup> Several attempts to reach a CCN representative were made over the course of two months. Initially, the response was a request to provide “proof of authority” to conduct this research on behalf of the region. In response, a letter signed by the regional chair was provided to the CCN representative. However, despite this good faith effort, the representative did not respond to additional requests to schedule a meeting and demonstration.

## 2.2 Research Findings

### 2.2.1 Jobspeaker Pilot Findings

Feedback specific to software features is detailed in the section below. High-level findings include:

- Students, faculty, and staff found the connection from college programs to skills to be a valuable and unique feature
- Students favorably reviewed Jobspeaker for providing a variety of useful tools, including a comprehensive job board, resume development and other career preparation resources, and career exploration tools
- Staff found case management and WBL tools promising but in need of enhancements
- Students, faculty, and staff recommend user experience improvements related to navigation and user support
- Pilot participants were favorable in the level of collaboration offered by Jobspeaker staff

#### Assessment of Jobspeaker Features Tested

Table 1 below provides a high-level summary of the Jobspeaker features tested and by which college. The table also includes a snapshot of the findings and a determination of disposition (e.g., works well as is, needs refinement, or needs further development). Full details of the features tested and the results follow the table.

Feature	Tested by	Finding	Disposition
<b>Student-Facing Preparation and Placement Tools</b>	Mesa, Miramar, and Palomar	System provides a variety of features that students found valuable. Navigation could be improved to make the user experience clearer.	Recommendations submitted to Jobspeaker for assessment
<b>Job Placement Case Management</b>	Miramar and Palomar	Transparency into student progress, including alumni tracking, is valuable but some enhancements, like structured ways to record the types and outcomes of interactions with students, would be needed to support JPCMs.	Recommendations submitted to Jobspeaker for assessment
<b>WBL Process Management</b>	Miramar and Palomar	Process management tools are helpful but there needs to be more differentiation and clarity around the multiple types of WBL activities that can be managed.	Recommendations submitted to Jobspeaker for assessment
<b>Career Services/Events Management</b>	Mesa, Miramar, and Palomar	Tools are straightforward and appear to meet needs.	

Feature	Tested by	Finding	Disposition
<b>Alumni Experience</b>	Miramar	Differentiated access with new mentoring tools is a good start but additional features like signing up for the alumni newsletter or submitting a success story would be helpful to support networking.	Recommendations submitted to Jobspeaker for assessment
<b>Managing Employers and Opportunities</b>	Mesa, Miramar, and Palomar	Tools are straightforward and appear to meet both college and regional needs but will need to be re-evaluated once HubSpot API requirements are developed.	Requirements need to be developed for how to connect HubSpot and Jobspeaker to collect and manage the right data elements
<b>Skills Feature</b>	Mesa, Miramar, and Palomar	Innovative and great potential for connecting education programs to career engagement. Some modifications, such as differentiating between skills to be achieved upon completion of the program vs. skills the student has achieved through course completion, will help students better use this feature.	Recommendations submitted to Jobspeaker for assessment

*Table 2: Summary of Jobspeaker Features Tested, Related Findings, and Disposition*

**Student-Facing Preparation and Placement Tools.** All pilot committee members explored student-facing tools and provided feedback. Substantive feedback was provided by faculty and student workshop participants at Mesa College and student workshop participants at Palomar College. Because students are the most critical user audience for this set of tools, relevant quotes from student participants have been included below.

Summarizing the feedback collected, students and faculty generally found Jobspeaker to be engaging, useful, and relevant to their experiences. Tools that particularly stood out with high ratings include the Learning Center’s career readiness videos, such as how to prepare for an interview; the uExplore section with Burning Glass career exploration tools; the ability to quickly build a profile/resume based on the courses (and their related skills) in the student’s selected program of study; and the ability to see job postings across multiple sources (e.g., the college’s own Jobspeaker-posted opportunities, Indeed, Glassdoor, etc.) in an engaging user interface. Students thought the mobile application added value, though it was not formally reviewed.

At the same time, students and faculty almost universally struggled with navigation and terminology issues. Many test users recommended providing more context about what particular tools were to be used for, how the various features connected and relate to career readiness, and requested support materials in the form of user guides, tutorial videos, and additional on-screen instructions.

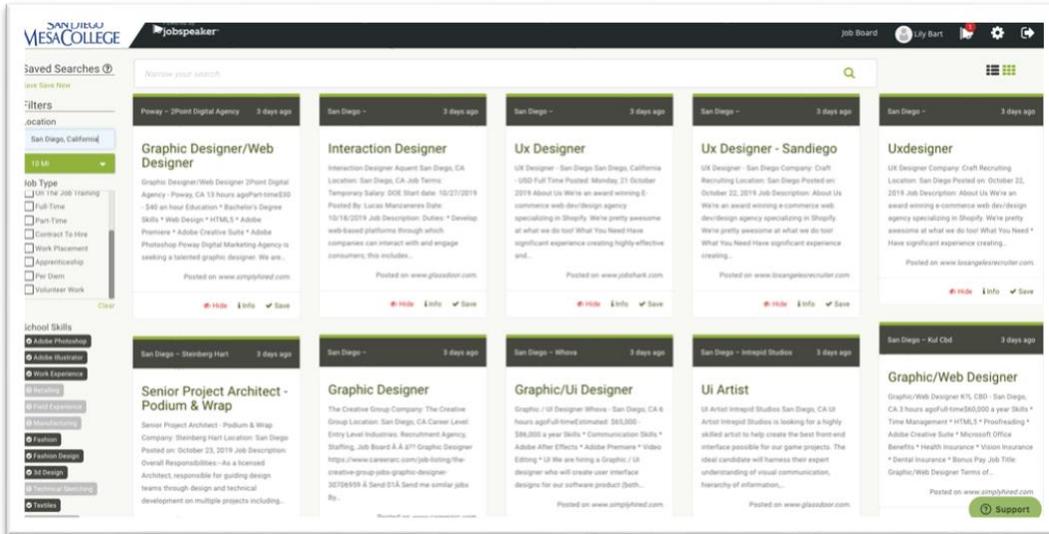


Figure 3: Job Board

Sample feedback from students regarding the student-facing tools include:

#### Job board and managing job progress tracking

- *It was really easy and can help know what step in the application process you are*
- *Found that Jobspeakr provides more options in job searches than most search engines*
- *The on-campus option is nice and they give you a wide range of options. Like instead of just giving you one option when you search for 'writer,' it gives you ones you didn't even think of.*
- *This is probably one of the best websites to look for a job.*
- *I like that it includes job listings from multiple places instead of having to navigate to each site separately*
- *Needs more filters (i.e., salary, experience level, etc.)*

#### Courses & skills/profile management

- *I do believe that this feature is a very useful tool for students that are certain of their major. It shows all classes one needs to take action for a certain major and I think that's awesome. It's like an online counselor.*
- *It's good to recognize your skills and have a comprehensive list of them*
- *After adding program/major, all courses were shown immediately. Very nice for everyone to see.*
- *It was nice to see all the options I had for classes but I did not like how there wasn't an option to delete a bunch of courses at once. It was confusing about what they meant by courses, like was it courses I should take or have taken?*
- *With most websites they only let you input pre-selected choices. What I like is the ability to create your own skills aside from a drop-down menu.*
- *Like how it creates a resume for you*

- *This is an easy way to create a very professional looking document. To be able to edit the final resume copy would be good.*

#### Career exploration

- *I absolutely love this feature because it is super insightful and valuable tool to have accurate data on desired careers*
- *Favorite tool so far*

#### Learning Center videos

- *The videos would have helped a lot when I was going through the interview process. It will be very helpful.*
- *This will be invaluable for new students looking for interview help*
- *A very effective way to understand and prepare for an interview/internship*
- *I really like the transcript option because sometimes you can't follow along or listen out loud*

#### Messaging

- *It seems very helpful to be able to be in direct contact with the employer*
- *Really good tool. It is good for when you can't call or meet in person to ask a question.*
- *Good feature to talk to employer. I wonder if employer would use this discussion post rather than email.*
- *Not sure how many students/employers/teachers (?) would actually use this, since there are so many other channels of communication.*

**Job Placement Case Management.** While other pilot committee members were trained on and explored job placement case management features in Jobspeaker, the majority of feedback was generated by the Job Placement Case Managers at Palomar College and Miramar College, who explored the features in more detail by embedding Jobspeaker into case management activities with a small group of students.

Within Jobspeaker, case managers and others working with the student are able to access and evaluate a student's developed online profile(s), resumes, cover letters, and other documents to provide guidance. This set of functions is fairly standard to most career services software.

However, Jobspeaker also allows case managers (and those with appropriate access to student profiles) to view the status of all opportunities that a student is pursuing. The tool has a linear set of stages that students update to record where they are with each opportunity, and this Job Progress tracker is also available to college staff for advising and reporting purposes.

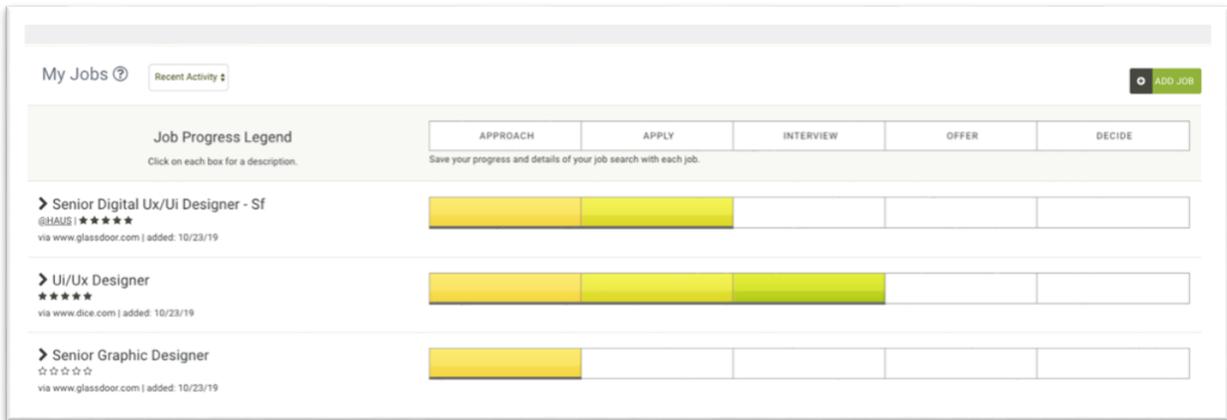


Figure 4: Student's Job Progress Tracker

This was reported as a valuable asset for case managers in organizing advising activities and determining where support may be needed. For example, if a student is applying to many opportunities but never receiving an invitation to interview, the case manager might explore the student's resume and cover letters in more depth. If a student has reached the Interview step many times but has never received an offer, the case manager might focus on helping the student strengthen their interview skills.

Through the Jobspeaker Job Board, college staff may use filters and searches to locate and recommend good matches to students as well as use Jobspeaker's messaging function to contact students as part of the overall job placement case management process. Users liked the skills functionality on students' profiles as a way to better locate matches between students and opportunities. The potential for case managers to collaborate across the region to find student candidates that match an employer's need based on consistent skills taxonomies was another potential benefit identified by pilot users. (See section 2.2.2.2 for more detail on the skills feature.)

The uVerify tool to survey alumni on their current career status seemed like an interesting tool to use for tracking and reporting, though no colleges elected to explore it with real users during the pilot. As explored, the form seems to contain the information that would be required in tracking alumni outcomes but users stressed the challenge of making contact and motivating alumni to respond, which has been an issue with all other attempts at electronic alumni tracking (e.g., the statewide CTE Outcomes Survey).

Within a student's profile, the college may record the initial assessment details for the student, with basic reporting requirements and a marker for current employment status (e.g., Active = Looking for Work).



**WBL Process Management.** The work-based learning tools offered in Jobspeaker were primarily explored by Palomar College, which provided both faculty and student feedback after using the system to support a series of Cooperative Education courses, and Mesa College’s pilot committee members, who analyzed the system and provided an overall assessment and detailed recommendations.

Palomar’s Cooperative Education students reported the system was easy to use and made it easy to report their objectives and hours. The faculty member who used it reported that the electronic process had key advantages over their paper process, including:

- Students can login at any time to view how many hours completed
- Students can see when they have met the required number of hours
- More efficient administrative process: able to collect required information about the WBL activities tied to specific course(s) the student is enrolled in
- The evaluation interface worked well

The participating faculty member provided a number of recommendations, such as the ability to select a full-time or part-time job for the cooperative education experience, to improve the overall process, which were submitted for evaluation to Jobspeaker, and addressed in subsequent software updates.

Mesa College assessed the current tools and reported that the system’s intermingling of “work experience” and “work-based learning” terminology and functions was confusing. They reported there was insufficient functionality in place for students to self-report their WBL experiences. As a workaround, Jobspeaker modified the Events tool for students to add these experiences but that did not make sense to users. Student workshop participants were asked to locate where they would self-report an informational interview that they completed and were generally confused.

Jobspeaker’s strengths in WBL-related tools appear to be in managing course-based experiences, where a structure has been developed to support the college in defining requirements and for students and faculty in documenting learning objectives, reporting hours completed, and designing and delivering online assessments. WBL enhancements that were made by Jobspeaker during the pilot include:

- Ability to view and manage workflows
  - Define workflows by job/experience type
  - Define any required attachments (e.g., resume, certifications, etc.)
  - Define language pertaining to messaging to students, employers, and staff from instructions to disclosures/agreements per party
- Ability to upload documents and resources pertaining to WBL
- Allow a student to trigger evaluation
- Ability to edit the information in a WBL record at any stage (staff and faculty only)
- Ability to reject application and request changes or reject and close record
- Define activity by course or job type
- Employers and staff can share jobs with the college that do not post to the job board and can then be shared directly with intended students

### Evaluation

Objectives

	4	3	2	1	0
Demonstrate ability to...	<input type="radio"/>				
Show proficiency in...	<input type="radio"/>				
Perform duties utilizing...	<input type="radio"/>				

Habits

4 = Excellent      3 = Above Average      2 = Average      1 = Below Average      0 = Not Applicable

Strengths

Weaknesses

Overall

Will you continue to employ this student?  Yes  No

Figure 6: Employer Assessment

The inclusion of WBL opportunities on the job board is valuable when a student needs to search and apply for an internship like they would a job. When the opportunities are less formal but still need to get tracked (e.g., an information interview), it was less clear to students where they would track this in Jobspeakr.

**Career Services/Events Management.** Pilot committee members who currently work in the career center and/or manage events explored Jobspeakr to provide feedback. Students also explored events at Mesa College and Miramar College.

Generally, students found the Events section of the system to be straightforward and appreciated its simplicity. College staff found that setup was simple but reporting options were confusing. One specific recommendation generated from an interview with a career center staff member was that the region should have transparency around campus events. Often colleges are competing with one another for employer participants and knowing which campus was hosting events such as career fairs would help for regional coordination and collaboration. It would also allow students to find events at other colleges that might be relevant for them.

**Alumni Experience.** One pilot college’s alumni coordinator explored Jobspeaker through the lens of an alumnus user and provided feedback and recommendations. Namely, it would be helpful for more variation in the alumni role to focus more on communication and networking. While alumni might be returning to Jobspeaker to look for jobs, colleges hope they would also continue to engage with the college by reporting on their current employment, signing up for the alumni newsletter, signing up to be or find a mentor, submitting an alumni success story, or signing up for events.

This fall, Jobspeaker will launch its Mentor Center module. Alumni users have an option to become a mentor within Jobspeaker and fill out a mentorship application with details such as their career path, the mentorship areas they would like to engage in (e.g., Interview Skills), and the topics they can provide guidance on. Additionally, mentors may include job types they can offer to students (which is only visible to school staff for engagement purposes). Colleges review applications and approve mentors to be listed in the system.

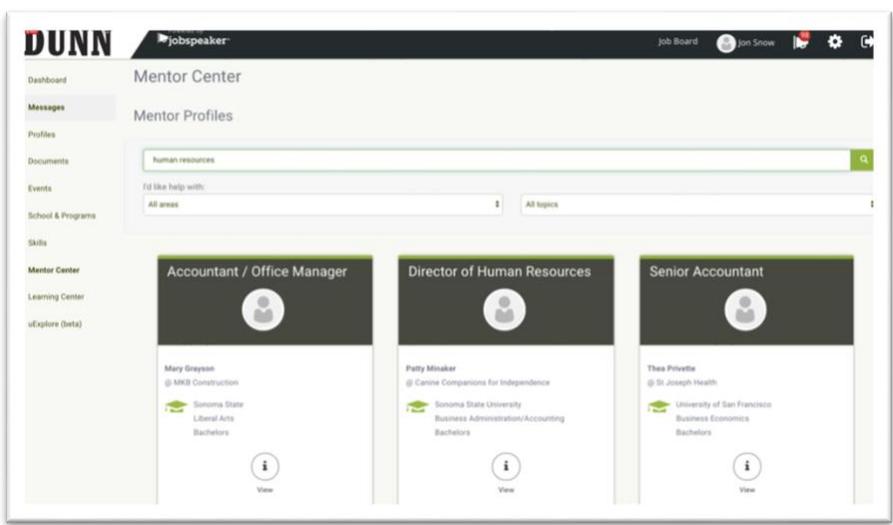


Figure 7: Mentor Center

The Mentor Center provides a searchable list of profiles for active mentors in the system. Mentors can be searched by mentoring area and/or topic of interest. Student users may send a message via a mentor’s profile to request mentorship. Mentors receive an email for the request and can decide whether to accept and engage with the student. If accepted, a new message thread is added to the student’s Messages section. When mentorship requests are made by students and when they are reviewed by the mentor, the college is also notified.

**Managing Employers and Opportunities.** Pilot committee members who currently manage employer records in existing systems as well as the RD who participated in regional testing activities explored employer/opportunity management tools in Jobspeaker.

Most users found the employer and opportunity record setup to be straightforward. There were questions about the terminology used on the lists of types of engagements that an employer has agreed to participate in and questions about whether that could be configured by the region.

Opportunities can be added and managed by employers logging in directly or college staff adding opportunities to the system. Built into Jobspeaker is the ability to share opportunities with one or more partner colleges when posting them.

Some enhancements were made by Jobspeaker during the pilot to address the emerging discussion around “CRM” features (which is also a topic with existing Jobspeaker clients), including the ability to set ownership and access rights to employer contacts. Additionally, the regional hub prototype was developed to show how employer information could be managed across the region. Employers could log into a single system (rather than individual logins for each college) and post opportunities to all 10 colleges at once.

Regional users such as RDs could login to that same regional hub to view aggregate employer and opportunity data such as:

- Number of active employers
- Number of active jobs
- Number of filled jobs

Jobspeaker’s Job Board displays opportunities from a variety of sources. Opportunities entered into Jobspeaker by employers or college staff are prioritized and appear first in a student’s search. Jobspeaker also aggregates job listings from multiple online job boards (e.g., Glassdoor.com and Indeed.com) so that students have a single location to view all available opportunities.

**Faculty and Student Workshops.** The pilot colleges conducted workshops to provide opportunities for faculty and students to access the tool and provide feedback. The tables below present the distribution of responses to post-workshop surveys, by college. Highlights of the results include:

- 63% of faculty would encourage students to use Jobspeaker
- 83% of students said they would encourage their peers to use the system
- 93% of students and 75% of faculty said that the platform would be a valuable resource for students

Mesa College – Faculty Workshop (20 participants)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Students will be able to easily navigate the technology platform and use its features.	8%	33%	8%	50%	0%
The skills associated with my courses/program accurately represent the skills learned by a student at Mesa College.	25%	50%	17%	8%	0%
The technology platform provides information about workplace experiences for students.	9%	36%	27%	18%	9%

The technology platform makes applying for and/or participating in workplace experiences easy for students.	0%	67%	17%	17%	0%
The technology platform would be a valuable career exploration and resource tool for students.	25%	50%	17%	8%	0%
The technology platform makes it clear to students how each feature is helpful for career readiness.	8%	25%	42%	17%	8%
I would encourage students to use the technology platform to prepare for their careers.	36%	27%	27%	9%	0%

#### Mesa College – Student Workshop (41 participants)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Students will be able to easily navigate the technology platform and use its features.	17.5%	50%	20%	12.5%	0%
The skills associated with my courses/program accurately represent the skills learned by a student at Mesa College.	25%	55%	15%	5%	0%
The technology platform provides information about workplace experiences for students.	32.5%	42.5%	22.5%	2.5%	0%
The technology platform makes applying for and/or participating in workplace experiences easy for students.	45%	42.5%	12.5%	0%	0%
The technology platform would be a valuable career exploration and resource tool for students.	62.5%	30%	5%	2.5%	0%
The technology platform makes it clear to students how each feature is helpful for career readiness.	22.5%	37.5%	12.5%	25%	2.5%
I would encourage students to use the technology platform to prepare for their careers.	37.5%	37.5%	20%	5%	0%

#### Palomar College – Student Workshop (20 participants; focused on job placement)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Students will be able to easily navigate the technology platform and use its features.	35%	45%	10%	10%	0%
The skills associated with my courses/program accurately represent the skills learned by a student at Palomar College.	35%	55%	5%	5%	0%
The technology platform provides information about workplace experiences for students.	40%	45%	10%	5%	0%
I would encourage students to use the technology platform to prepare for their careers.	35%	55%	5%	5%	0%

In addition to providing feedback via surveys as summarized above, students also provided comments as detailed below.

- *I like the features it has because it is easy to navigate and gives a good view of what to expect when applying for a job.*
- *I think this is a great resource for students to be able to use, but I found the website to be challenging to navigate at some points. I definitely think the idea behind it though is great for students who are just graduating to gain experience in the workforce.*
- *Only needs a little more detailed steps and the setup is great. Loved it.*
- *I would recommend a step by step tutorial that tells you first put your career plan, now upload your resume here, etc.*
- *Some areas could be given extra instruction/explanation and make it clear to students how each feature is helpful for career readiness.*
- *It is a great way to learn and search for job positions, how to do well in job interviews. I would definitely encourage students to use Jobspeaker.*
- *It is a nice easy platform, but needs a tutorial for new comers as the website drops you in and doesn't really tell you anything. Overall the website is informative and helpful.*
- *I really like Jobspeaker because it makes a lot of the things in my life seem super simple and quick to do. If it wasn't a thing I would probably be frantically googling everything and panicking.*
- *I personally think this tool/platform will be useful for many students/people seeking jobs. It would be better if there were pop-ups to explain/guide the user through the website and get started quick.*
- *Job Speaker has major potential to be helpful for students! There are a few glitches/inabilities that need to be worked out, but other than that, the site is excellent.*
- *The only big thing is ease of use for navigation. Events could be better named, and some sort of "how to use" feature.*
- *It is a great way to learn and search for job positions, how to do well in job interviews. I would definitely encourage students to use Job Speaker.*

### Course-Based Skills Feature

The desire for shared language and the need to connect the skills that students are developing at the colleges to what employers are looking for is a consistent theme across the region, cited by all roles in the employer engagement model. Discussion around skills taxonomies is growing in workforce development and related technologies. Recently, Emsi, a labor market analytics company, curated nearly 30,000 skills from hundreds of millions of job postings, resumes, and professional profiles, and launched a public, online library providing an up-to-date collection of the actual skills that candidates report and that employers are looking for.

Additionally, within the region, the KSA Analyzer was developed by the Centers of Excellence as a way to visualize and compare (through Tableau) three sources of regional skills: job postings (from Emsi), candidate profiles (from LinkedIn and other resume sources), and the skills from O\*NET.

Jobspeaker addresses this growing desire to connect student skill attainment with employer needs and requirements, through its unique and innovative skills-based matching features. Namely, Jobspeaker utilizes a college’s course data, including skills from the SLOs, to create a customized profile for each student, based on the student’s selected program of study. Rather than having students wait until program completion to add the education certification/degree earned to their profile or resume, and identifying their skills on their own, Jobspeaker provides the student with the full list of courses to be completed in their program, aligned with the skills that will be attained upon completion of those courses. Students can maintain their profile’s courses and skills throughout their time at the college, providing an up-to-date, point-in-time summary of their progress which is available to the students, advisors, and to potential employers.

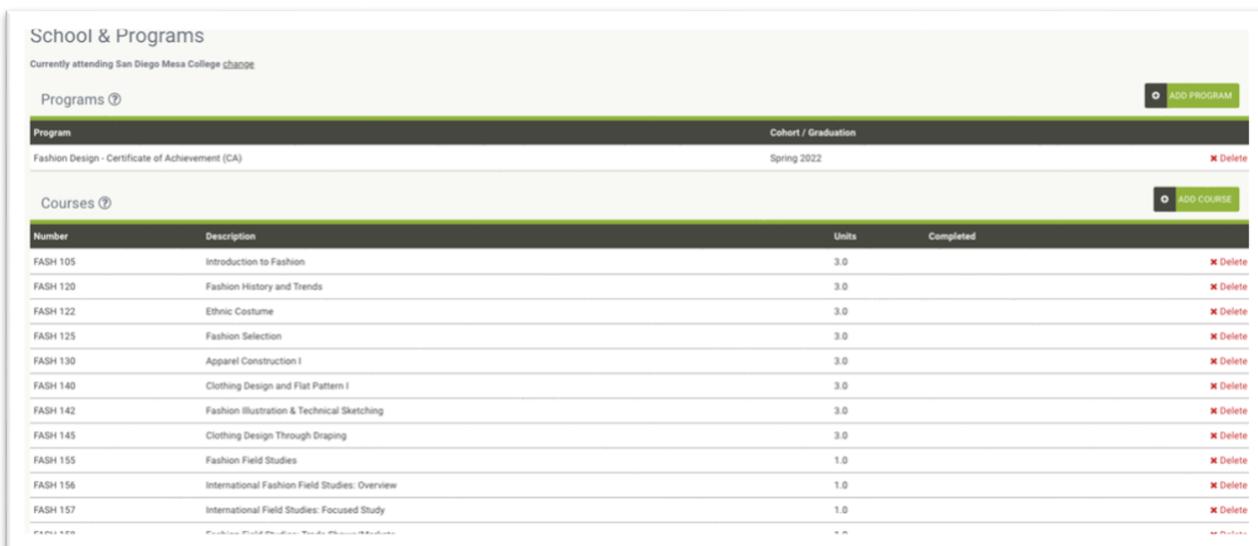


Figure 8: Student’s School & Programs View



Figure 9: Student’s Skills Bank

Students reported that they can easily create profiles and develop resumes based on specific educational attainment data from the college’s own course offerings. They may also self-report skills acquired outside of their current program (e.g., language skills) or from previous education or career experience. A verification process (through API or periodic data imports from the college’s student information system) will visually differentiate between self-reported course completion/skills attainment and verified course completion, giving employers a “college-certified” view of a candidate’s reported skillset.

Students can then be matched to relevant job postings based on the institutional skills attained. Jobspeaker is the only career engagement tool researched that creates this meaningful connection between the college's education programs and outcomes, the student's earned qualifications, and employers' needs, as expressed through the desired skills included on job postings.

To be effective, this set of features requires preparation and coordination, but also presents opportunities for improving/updating curriculum, focusing on alignment activities in advisory committees, and reaching regional agreements on how to collaborate across campuses. Some key areas of opportunity are:

- Promotes the need for regular faculty review of SLOs to make sure they are accurate, especially in sectors with rapid change (e.g., ICT)
- Promotes the need to regularly revisit employer-desired KSAs to make sure that courses are aligned with employer needs
- If skills data provided by the colleges is up-to-date and language is aligned throughout the region, it would allow employers to have cleaner and more consistent information about student candidates and their skills than if this information is coming from multiple sources in a variety of formats
- Provides potential for coordination across colleges to help locate skilled students to meet employer need
- Allows RDs and others to identify misalignment between desired KSAs reported via direct engagement with employers vs. what employers are listing on their Jobspeaker postings
- Provides RDs and others with additional data to identify gaps between reported skills attained by students and skills required by employers

Often technology can be the catalyst to expedite institutional goals and Jobspeaker presents an interesting set of potential benefits if utilized. See section 2.2.2.6 for implementation considerations related to this set of features.

### Regional Coordination Testing

While the individual colleges piloted tools to see how they could work on their campuses and within their own processes, the pilot also needed to address how Jobspeaker could work regionally. Miramar College and Palomar College participated in cross-campus pilot activities to document the perspectives of:

- JPCMs sharing employers and opportunities across campuses and accessing regional candidates to support meeting employer needs
- RDs having access to information about how employers are engaged in the region and access to student profiles across multiple campuses
- Employers using the system to manage opportunities and view candidates across multiple colleges

To do this, both colleges had students in their respective Diesel Technology programs enlist students to explore the system and create their profiles. At Miramar, this was achieved through the JPCM reaching out to faculty, making classroom presentations, and working directly with students. At Palomar, students participated in a classroom activity in which they were asked to create their profiles and explore particular aspects of the system.

Once completed, there were 29 student profiles in Diesel Technology programs across the two colleges, providing a small proof of concept to explore roles and functionality in a regional system.

Jobspeaker set up a test “regional hub” installation in which employers could access a single system to post opportunities to all 10 colleges and where employers (and others with authorization such as RDs) could view employers, opportunities, and student candidates across all 10 colleges.

The Advanced Transportation and Logistics RD gave feedback on the regional hub and what type of information he would be interested in viewing, including employer and placement metrics. The RD believes it might also be valuable for those in his role to have access to view the candidates across the colleges in support of meeting employer needs or for informational purposes (e.g., which college has students that report a particular skill).

The JPCM at Miramar and the pilot lead at Palomar also provided input on the regional hub prototype and its applications. For example, it might be valuable for JPCMs to have access if they need to support an employer in looking for viable candidates for a position that cannot be filled by students at that JPCM’s college. Being able to search for/filter candidates across the region to find out which college might be a good fit would be a useful tool, allowing the JPCM to reach out to their counterpart at the college with the best candidates to meet the need so they can follow up with the employer. Having access to information like this would better foster collaboration and make for a more efficient process in supporting employers and placing students.

All participants in the pilot spoke to the need to work across the region to develop the specifications Jobspeaker needs to configure the regional hub appropriately for the following functional areas:

- Who else other than employers has access to the regional hub?
- Should these individuals have the same limited access that employers have for viewing student profiles or is another level of access required?
- What types of reports are needed on regional hub activity vs. individual college installations?
- How does the regional hub intersect with each college’s Jobspeaker installation?

Jobspeaker evaluated potential use cases as part of their response to pilot feedback, which is documented in section 2.2.2.5.

### Colleges’ Impressions of the Vendor

Pilot participants were asked to reflect on the level of support provided by Jobspeaker and their impressions on the company’s insight into community college audiences.

Pilot committee members praised the assigned account manager they worked with on providing good training, setup, and implementation support. Participants felt they were listened to, that Jobspeaker was open to recommendations, and willing to modify their product when it needed correction or enhancement. The installation setup, training, and consulting stages of the pilot highlighted the benefits of working with a company like Jobspeaker. They do a majority of their business with California community colleges and understand state-specific needs and challenges. They are able to connect the program needs (and implementation challenges) of other California clients to the needs of the pilot colleges and offer specific guidance on the use of technology to meet goals.

During the initial project phase, in which colleges had their installations set up by Jobspeaker and were given an overview of the various configuration options, colleges were curious about what were available configuration options versus customizations and Jobspeaker solicited all user feedback. Some colleges did identify customizations that were not configuration options and believed that they could not share the system with faculty or students without those customizations made. It was unclear if there were workarounds available to allow meaningful activities to be completed with the product as is. Jobspeaker would often address enhancement requests because the requested changes would improve the overall product and benefit other clients. Other times, Jobspeaker would make modifications that were customizations to fit the needs of a particular college. Sometimes this was seen as reactive and that solutions were put in place quickly without additional consultation. Jobspeaker's attempts to swiftly address feedback without a formal change management process may have been a result of the pilot process and timeline, as some campuses were unwilling to begin pilot activities without modifications being made to the product, and Jobspeaker wanted to ensure success.

In a conventional implementation with a client, Jobspeaker would be more formal about its change management process and if the system was used as a regional solution, modifications would be managed through a formal governance process in consultation with Jobspeaker. See sections 3.3.4 and 3.4.2 for recommendations on how this work should be managed.

Jobspeaker's overall willingness to address enhancement requests speaks to their value as consultants and thought partners in helping the colleges implement the technology as it exists today and also inform how the product can be enhanced, scaled, and meet the developing needs of the colleges. In speaking with staff who have used other systems, it appears that Jobspeaker is more flexible in addressing enhancement requests and is developing the product in ways that specifically meet the needs of the community colleges they work with. For example, in response to a developing need for colleges to provide more robust career assessment and exploration tools (and ideally provide them alongside placement tools via a single platform), Jobspeaker conducted research into existing systems that met their clients' needs. Jobspeaker recently partnered with [Awato](#), a promising career assessment and exploration system, that will allow for integration of the two systems if a client desires. Awato was researched as part of the Pathway Navigation Workgroup project (see section 3.4.4.2) and is currently used by Southwestern College. Students there who used Awato's assessments were surveyed about their experience and provided strong feedback, for example:

- *The questions were clear, specific, and easy to understand:* 84.6% responded Strongly Agree; 15.4% Agree
- *I have gained awareness of career options that might be a good fit for me:* 69.2% responded Strongly Agree; 26.9% Agree

### Summary of Recommended Product Enhancements

A list of recommended product enhancements was developed based on pilot data and shared with Jobspeaker for evaluation. See Appendix F for the full list of recommendations.

The main categories of recommended enhancements include:

- Improve the overall site navigation, including a better onboarding experience for students
- Provide more user support in the form of user guides, on-screen tips/instructions, and videos
- Create more structure around the case management tools to collect and report on greater detail
- Allow students to differentiate between courses (and their associated skills) completed vs. those in their selected program
- Create more coherence around the multiple WBL functions in the system

At the same time, Jobspeaker assessed setup requirements for regional adoption that would allow sharing of data across colleges and with the CRM, too. These requirements include:

- Determining level of effort for creating data sharing functionality with a third-party CRM system.
- Configuration of the “regional hub” for employers to manage opportunities that are available to all students and to view all regional candidates. Process decisions are to be determined by the region but Jobspeaker was asked to consider the following:
  - Assume approved employer data from HubSpot is shared with the regional hub
  - Assume that employers will access the regional hub to post opportunities in and those opportunities are automatically shared across all 10 college installations for students to access
  - Assume that employers use the regional hub to review student candidates across all 10 colleges
  - Assume that some small number of users at each college also has access to view student candidates across all 10 colleges to support employers when a need can’t be met by their college, but another college may have good candidates
  - Assume colleges may still have proprietary relationships in their own installations and these are not part of HubSpot or the regional hub

### Jobspeaker Assessment of Recommended Enhancements

Jobspeaker assessed the list of 44 recommended enhancements that emerged from pilot activities and categorized them into three areas:

1. Requests that are already completed or in progress (9 items).
2. Requests that will become part of Jobspeaker’s product roadmap for development (20 items).  
(Note: while many of these features would be funded by Jobspeaker to improve the product,

the region may wish to prioritize some of these elements of the product roadmap or influence the specific functionality around them. If so, this may require an investment from the region.)

3. Requests that are custom to the region (15 items).

Requests in all three categories were given a timeline for development and next steps. The feature requests that are not in progress were assumed to have a start date of January 2020, which would need to be revised depending on the region's decision-making timeline.

A next step for addressing requests that are part of the Jobspeaker roadmap or custom to the region is to conduct more detailed discovery and planning activities (see section 3.4.2), which would yield a cost estimate and schedule for the desired development work.

See Appendix F for the full list of recommendations with designations for timeline and next steps.

### Implementation Areas to Address

Implementing a regional technology solution for career and employer engagement will require developing a variety of adoption strategies on campus and within the region. This section describes some common approaches as well as case studies/lessons learned from other Jobspeaker clients. For more detail on implementation recommendations, see section 3.

**Resources and Relationships Needed.** Jobspeaker is a collaborative platform with no limit on account holders for college staff and faculty. A variety of user roles are available for school staff and faculty with varying levels of permissions and focus. These include Administrators, Counselors, Job Developers, Instructors, and accounts for Student Workers.

In working towards replacing existing technology systems, enhancing offline processes, and/or adopting an entirely new set of practices (as well as new software), a number of stakeholders and participants must be involved not only in adopting the tool but helping to implement and manage it. Specific to the adoption of a regional career engagement system, the following is recommended:

- A single point of contact on campus for regional coordination activities with RNs and others
- A small group of admins/project leads who manage software tasks and decisions at the campus level. This may require cross-team collaboration depending on how a college is organized.
- Regular outreach to stakeholders (students, faculty, employers, etc.) for feedback
- IT for setup and support, when applicable

**Student Engagement.** Technology solutions aimed at students are only as good as the students' level of engagement. Implementation of new software does not automatically result in technology adoption by users. Jobspeaker provided recommendations on how to engage students and what has worked best with their clients:

- *We have found that student engagement has had its best results on campuses with Student Workers/"Student Ambassadors." These are students who through peer to peer assistance and*

*workshops, help fellow students get set up on the platform and provide guidance to faculty and other staff about how they can leverage the platform for their students.*

- *Furthermore, the more consistent the communication from staff and faculty to students relaying the need or requirement to use the platform in order to engage, take advantage of and access employment and WBL opportunities, the greater the level of engagement and user dependence. This is most effective when embedded into the students' college experience from the beginning, e.g., as part of orientation and continuing until graduation and after.*

Whenever possible, requiring use of the system for certain practices will ensure that students are engaged at least for those activities and allow for the related tracking or reporting of that activity. It would hopefully encourage students to utilize other features while they're there but they would need to see the value of those other tools.

Embedding the use of the new software in existing or developing processes might include:

- Onboarding after enrollment: students could automatically receive accounts when they enroll at the college
- Career planning and counseling: students could be required to create an account for their initial career planning/counseling activities
- WBL activities: students could be required to use the system to complete required steps like writing objectives and reporting hours
- Job placement case management: students could be required to create accounts and complete their profiles before receiving case management support
- Classroom activities: students could be encouraged to use the system as part of related career-related curriculum
- Campus events (e.g., career services workshops, job fairs): students could be required to register for events on the system, requiring account setup to do so

MiraCosta echoed this recommendation in discussing their implementation of JAIN (GradLeaders). In their case, work study and internships require students to go through JAIN, which promotes use for at least those student groups.

**Faculty Engagement.** Faculty can be encouraged to use the system to meet a variety of needs, including but not limited to increasing the efficiency and frequency in which they engage with their employer partners. The system would allow them to serve their industry contacts better, supplying them with the candidates needed while being able to report on their efforts as well.

Faculty also have the ability to use tools from the platform in their classroom. Through utilizing the WBL module, instructors can embed the module into their curriculum, creating mandatory usage for students all while maximizing their efficiency in the tracking, recording, and reporting of these efforts. Currently, Jobspeaker staff report that many instructors still use spreadsheets or "bluebooks" to track this information and engage with their employer contacts involved in these efforts. A shift to electronic

processes would create efficiency but also facilitate better reporting on these types of activities across the region. Communicating these benefits to faculty will be key and should be addressed in the communication plan (see section 3.3.2).

**Deans/Associate Deans Buy-In.** It is critical to involve deans (as well as IT, academic senate, and departmental chairs) in communication efforts to ensure they are aware of the value of utilizing the system for their departments and college, their students, employer partners, and the community at large. Jobspeaker provides the tools to see how well their departments and direct reports are performing in serving the needs of their students from a workforce perspective, ensuring that each department can understand and respond to their internal reporting needs and external workforce requests. To ensure buy-in, the region should build in regular updates in the communication plan for these stakeholders.

**Technical and Content Considerations.** As with many new technologies, there are a number of setup tasks that will need to be addressed by each college in order to most effectively implement Jobspeaker. Meeting with IT staff to assess their ease of access to required info/data will be an important first step. The following tasks can be scheduled to meet the setup requirements and should be detailed in each college's implementation plan:

- *Curriculum Systems/Course Catalog Integration.* Jobspeaker cannot be utilized without first adding the college's program data. The related features would be inoperative without it but this does present certain challenges if a college does not have data readily available. These are
  - Integration with the college's curriculum system is recommended in order to automate and keep abreast of any changes made in the course catalog.
  - If integration is not possible immediately, a download of course data in varying formats can be used to load curriculum into the system. The college could use this approach until time is available to address integration.
  - Faculty involvement to review skills alignment is encouraged in order to ensure programmatic alignment and increase faculty buy-in.
- *Single Sign-On.* Single Sign-On with the student information system (SIS) is recommended for student onboarding in order to reduce the number of hurdles for student sign-up and to ensure continuity in student engagement with all platforms across campus.
  - SIS integration can be accomplished in multiple ways, the most direct and efficient being via API. If not, a manual process to keep student information up-to-date can be accomplished via export and import of flat files.
    - Typically, this information is electronically provided on a monthly basis (at a minimum) to ensure students' verified skills are displayed immediately.
- *Website(s).* We recommend providing clear and easy access to Jobspeaker from the college's website to students, employers, and other potential users. Jobspeaker provides each college with individual student and employer landing pages that could be linked.
- *Email.* Colleges should ensure that all Jobspeaker URLs and email addresses are whitelisted on campus.

- *Employer Database.* Schools migrating from another technology platform are encouraged to download their company/employer database in full via Excel or .CSV file. This export can be easily imported into Jobspeaker.

**Data and Reporting Requirements Need to Be Agile.** Processes, roles, and responsibilities are still being developed and require vetting and approval across the region before they can be implemented, which will require coordination, agreement, documentation, and training on how related data collection can be conducted consistently.

Jobspeaker can be configured at each college so that all data collected conforms to minimum expectations for the region or for state reporting requirements. Jobspeaker can also provide the ability for each college to ask for additional data unique to that college/program/student/employer.

It is likely that modifications will be needed for Jobspeaker to meet the process requirements developed (e.g., determining the values on drop-down menus). Jobspeaker appears to be flexible enough to accommodate ongoing changes to existing structures but to ensure accurate reporting, the tool will need to be consistently configured and used.

At the very least, the tool will enable colleges to capture employment-related Student Success metrics:

- Students who were unemployed who became employed<sup>3</sup>
- Career education students who reported that their job is closely or very closely related to their field of study who did not transfer<sup>4</sup>
- Median annual earnings for non-transfer exiting students, in the first year after exit
- Median change in earnings for non-transfer exiting students
- Students who exited but did not transfer who attained the living wage for a single adult in the county where the college’s district office is located

With regard to measures of progress, in addition to tracking skill attainment as described above, Jobspeaker will also be able to collect data along the student’s work-based learning and job-seeking journey, including

- Completion of a resume
- Completion of mock interviews
- Referral of students to work-based learning
- Completion of career awareness and exploration experiences
- Completion of internships and other immersive WBL experiences
- Referral of students to job placement services
- Meetings with job placement case managers in preparation for employment

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<sup>3</sup> Placement data, when jobs are brokered through Jobspeaker, will be available automatically.

<sup>4</sup> “Employment in field of study” is currently collected through the CTE Employment Outcomes Survey administered for the colleges through a California Community Colleges Chancellor’s Office contract with Santa Rosa Junior College. Through its placement records and Alumni pages — provided alumni keep the information up to date — Jobspeaker can provide this data to the colleges.

- Interviews completed
- Follow-up meetings with Job Placement Case Managers completed
- Feedback from employers
- Alumni contact

## 2.2.2 HubSpot Findings

During the assessment of three product options, HubSpot scored the highest number of points on the CRM evaluation rubric based on the following features and implementation considerations.

### Key Features and Advantages

- HubSpot has an intuitive, modern design that makes it easy for users to navigate the system and support consistency across user activities.
- The system is highly flexible and provides a wealth of self-service customization tools. Nearly every field in the system is configurable for labeling and admin users can determine any number of custom fields to collect, including defining the format, picklist options, etc. This will allow the system to be configured exactly as desired for regional users and to support data reporting requirements. It will also allow for easy, self-service modification when the need arises, rather than needing to rely on a vendor (which may have associated costs).
- Additionally, customizable workflows can be created with templates or easy drag-and-drop tools, to allow the region to determine its own sales process for employer engagement and to track progress with reminders and dashboards personalized to the user. The system includes Playbooks that guide users with onscreen tips/talking points when engaging with contacts and allow users to collect responses as they go.
- HubSpot offers integrated communication tools such as Gmail and Outlook plugins for automatically tracking email communications, making and recording phone calls from the system, use of email templates and automated email sequences, and notifications when a recipient opens an email.
- HubSpot offers robust marketing tools that appear as powerful as standalone products like Constant Contact and MailChimp, with the ability to design, deliver, and track the impact of communication campaigns to employers and other stakeholders with detailed analytics.
- The reporting system includes more than a hundred pre-built reports, a number of dashboard templates, as well as the ability to create your own reports based on multiple data sets.
- Implementation and client support are up-front costs and the vendor was transparent about their overall costs and competencies.

HubSpot's free version was used by a few RDs as a stopgap measure this year to manage employer details. While not a pilot, those users had good feedback on the basic product's usability and reliability.

### API Capabilities

Jobspeaker evaluated HubSpot's documentation to assess the feasibility of connecting the two systems in support of the recommendations. According to Jobspeaker technical staff, HubSpot API is a standard

RESTful API, which will make it easy to pull data from it into Jobspeaker. HubSpot has an extensive API, which should allow Jobspeaker to pull the data needed to populate employer record elements so that data are available to all colleges. Details about how this will work exactly will require discovery, development, and testing, and will depend on the decisions made by the region.

### **2.2.3 Career Engagement Tools Revisit of Prior Findings**

The six tools reviewed (see Section 2.1.4), using the revised evaluation rubric, had a relatively level playing field in terms of basic career engagement functionalities offered. For example, all tools have job boards and some form of student tracking. To provide a deeper look at addressing regional goals, evaluators focused on the following key areas. Each is described in greater detail below.

- Regional network capabilities: Ability for the tool to operate regionally in support of the sharing of employers and opportunities while allowing each college to manage its own students and other processes
- Student engagement: Ease of use and relevancy of student-facing career preparation and placement tools; any innovations or particular strengths demonstrated as related to student users
- Case management: Functionality for career preparation, WBL, and job placement case management
- Configurations: Ability to configure the system as needed at each college (while maintaining consistency across colleges as required for regional employer engagement purposes)
- Vendor impressions: Assessment of vendor’s reputation, responsiveness, and client feedback

#### **Regional network capabilities**

- GradLeaders described approaches they could take to accommodate this requirement, including a single portal used in the region or a system of shared employers with each college having their own look/feel.
- Handshake did not demonstrate a regional system solution.
- Jobspeaker created the regional hub prototype for the San Diego pilot and has been engaged in similar conversations with the Bay Area and the Central Valley around sharing employers and opportunities across multiple community colleges.
- Launchpad has an extensive permissions structure that could be used to accommodate a regional setup. They have created a similar system in Los Angeles County and in North Orange County.
- Purple Briefcase allows employers to connect to individual schools or to multiple schools in a consortia.
- Symplicity has set up a hub model they call “multi-instance” for a consortia of 15 community colleges in Indiana that allows for shared employers and opportunities.

#### **Student engagement**

- GradLeaders has a comprehensive set of student-facing tools with a strong focus on experiential learning but a less engaging user interface compared to other tools.

- Handshake features career research and crowdsourced career exploration information with a social network user experience reminiscent of LinkedIn. The user interface was less modern than other tools.
- Jobspeaker provides a robust mobile application, profiles populated by the student's program/courses/skills, and a video resource library within a modern design.
- Launchpad provides a simple job board with matching, job application, and tracking tools for student users but there were no other student-facing tools demonstrated and the user interface was less engaging than other tools.
- Purple Briefcase features an "engagement score" that details a student's progression through career readiness activities; Career Chats, a social sharing tool that allows users to engage around best practices in career engagement; and over 400 career preparation videos. The user interface is modern and engaging.
- Symplicity includes career planning resources, mock interview tools, and a resume builder that can integrate with Peoplesoft and other SISs. The system has a modern, engaging user interface.

### **Case management**

- GradLeaders features advising and scheduling tools as well as an extensive score card that tracks all student activities.
- Handshake has strong workflow/case management tools tracking student engagement.
- Jobspeaker provides ability to view student's progress in placement activity and a strong alumni outcomes tracking tool.
- Launchpad features robust activity tracking and transparency across various services the student engages in. As a Salesforce-based product, its capabilities seem well suited to case/contact management activities.
- Purple Briefcase can track student activities and create communications plans for cohorts of students and other user roles like employers.
- Symplicity provides a sequence-based approach and tracks activities with a predictive tool about progress being made. Case management tools are robust, with upcoming appointments, flags, notes, and engagement activity tracking.

### **Configuration options**

- GradLeaders has an upgraded solution that is more configurable and a flexible workflow in the Experiential Learning module.
- Handshake has customizable data analytics.
- Jobspeaker allows for configurations in workflows, permissions, and some menu options.
- Launchpad has a configurable case management platform to allow for changing labels, field names, etc., but it does not appear to be highly self-service.
- Purple Briefcase can be configured for terminology.
- Symplicity configures terminology, layouts, and forms as needed.

## User impressions of vendors

- GradLeaders has a strong user base of community colleges, including MiraCosta, who report that the vendor provided a lot of support during implementation but is less involved now that the system is operational.
- Handshake is very new to the community college market and reports that some features are not fully developed to meet the needs of this new audience.
- Jobspeaker has a lot of traction with California community colleges, with notable partnerships in the Central Valley and Los Angeles County.
- Launchpad is being used by the San Diego Workforce Partnership and Los Angeles County Office of Education to connect employers and jobseekers and seems well developed in meeting that need but is less focused on the career engagement areas of the student experience.
- Purple Briefcase was very responsive and provided a lot of detail to the evaluation team. An interview with a small college that implemented the system two years ago yielded favorable feedback on customer support provided. However, another college that is in the middle of implementing the tool reported poor customer support and a number of technical issues in scaling the product on their largest campus.
- Symplicity provides community college-specific features within their large suite of tools but there were a number of challenges reported in a previous implementation for the Education to Career Network, a consortia of adult schools and Palomar College, and they ended their contract.

## Summary of Findings

**GradLeaders** is a robust employer preparation, job placement, and career services tool covering the range of tools required in a platform. They reported extensive improvements over the last two years, implementing best practices in career engagement, including tools addressing job searching skills and financial literacy. Features and reporting offering is extensive but it has a less engaging user interface. It appears that the tool has API capabilities and would likely be set up as a regional instance using a similar approach to Jobspeaker. MiraCosta reports that the tool is an improvement on their old process but still presents integration challenges with other campus technologies (e.g., Peoplesoft, SARS).

**Handshake** operates much like LinkedIn for college students and recent graduates with a focus on highlighting things that are relevant to this niche of jobseekers. Their representative admitted they are very 4-year college heavy, just getting into the community college space with about 22 in the system now. They said their focus the last 1.5–2 years has been on the employer side. There is no current functionality supporting a regional implementation.

**Jobspeaker** has a number of California community college clients and cites their differentiating factor as being actively engaged with customers, in conversations on campus of what clients are getting, how they are using Jobspeaker, if it meets their needs, and feedback for improvements. The connection between curriculum, skills, and employer requirements is a key innovation.

**Launchpad** appears to have been developed with CTE, workforce development, and community colleges in mind, more so than other tools reviewed. As a CRM-based system, it has robust case management potential. However, there appears to be far less attention to the student experience than with other systems explored, with the system focusing mostly on job placement and college administrators' reporting and tracking.

**Purple Briefcase** has an engaging user interface and comprehensive set of features for students. The Career Chats social forum and the video channels are interesting innovations and are well suited to a digitally literate student audience. Case management and reporting tools also seem comprehensive. Given the difference in experiences noted by two current clients, there may be issues with the client support provided since the tool was acquired by another company.

**Symplicity** provides the most robust set of case management functionalities and has the strongest history on the market with a large number of engaged clients and employers. The user experience is more student friendly than some of the other tools but feedback from previous users in the region described the system as not intuitive to students and having case management challenges (e.g., the system did not automatically update a student's profile when a status changed).

### Summary of Recommendation

As noted in Section 1.5 above, the recommendation is to adopt and implement two technology platforms and connect them via API. Based on the extensive research conducted over the past two years and the results outlined above, the recommendation is to adopt both HubSpot and Jobspeaker. While the other tools reviewed (initially and during the revisit) present similar functionality and capability (to varying degrees), Jobspeaker offers a number of advantages. First, Jobspeaker's skills-based matching feature is unique and no similar functionality is available in any of the other tools. Additionally, Jobspeaker strikes the necessary balance of having tools that students will find valuable (profile based on academic skills; Awato; mentors) with college and employer process management tools. Also, the vendor's demonstrated willingness to adapt to the region's and colleges' needs is well-documented. These elements are what make Jobspeaker stand out from other products. Jobspeaker provides the best balance in meeting the needs of different user groups, including students, employers, and college faculty/staff and offers well-developed features in line with priority requirements as identified by the evaluation rubric.

## 2.3 Products of the Work

### 2.3.1 Guiding Principles for Implementation

Through process mapping and other discussions around the use of technology to support regional practices, a set of high-level guiding principles for implementation were developed and are intended to set foundational agreements on the goals of using regional technology solutions and consistent processes across the region and 10 colleges. The principles guide the implementation of the regional career and employer engagement model (see Figure 2) while recognizing college variations in practices,

adoption timelines, and capacity. In addition, the assumption is that all colleges agree with and will adopt all guiding principles and high-level process maps developed by the region (see process maps in Appendix G). The guiding principles include:

### **Overarching Principles**

1. Defined processes (see related maps and descriptions) will apply across the region and colleges will have flexibility at the campus level to implement based on their respective contexts.
2. The goals of the employer and career engagement model are to minimize the burden on employers (e.g., duplicative contacts and confusing communication), while also minimizing internal bureaucracy (e.g., rigid rules) and increasing the number of connections/relationships with employers and increasing job and work-based learning (WBL) opportunities for students.
3. There are systematic feedback and communication processes in place between Regional Directors and college faculty/staff to ensure that all follow-ups with employers have been completed and placement data are up to date.
4. While colleges will discuss internal practices on their campuses, the CoP will be the venue for problem solving and collaboration across colleges.

### **Regional-Level Principles**

5. Regional Directors will vet employers and enter employers and opportunities into the regional database per agreed-upon protocols.\*
6. New relationships with employers will be tracked in the regional CRM until they have been vetted and the employer is ready to work with colleges, at which time the employer information will be moved into the regional career engagement tool.
7. Unless otherwise designated (per protocol), employer information is posted to all colleges after vetting (even before opportunities are developed).
8. Unless otherwise designated (per protocol), opportunities posted are available to all colleges.

### **Campus-Level Principles**

9. Colleges will define and document their WBL and job placement processes that include technology and communication connections to other processes on their campus and the region.
10. These processes will be guided by the high-level WBL and job placement processes developed at the regional level and will be used as models.
11. Colleges will actively participate in the CoP to share challenges in a supportive environment and to ensure consistent communication, collaborative decision-making, and process management.
12. Each college will designate a point of contact as a referral for employers.
13. Each college will designate a point of contact for Regional Directors.
14. Work-Based Learning Coordinators (WBLCs) and Job Placement Case Managers (JPCMs) at each campus will communicate actively and coordinate their employer contacts and responses, bringing in other individuals on campus who might include career center staff, instructional faculty and others as appropriate.
15. All WBLCs, JPCMs, and career center staff will have access to the career engagement tool. Beyond these roles, individual colleges will decide who from their college has access to the regional database.

16. WBLCs, JPCMs, career center staff, and other job developers will enter employers and opportunities into the career engagement tool per agreed-upon protocols and processes.

### 2.3.2 Process Maps

The WBL & Job Placement Workgroup developed a series of process maps through detailed, iterative discussion of both current and ideal career and employer engagement practices. Over the period of six months, nearly 30 stakeholders, representing all 10 colleges, participated in a series of work sessions and review meetings to develop the maps.

The maps show the roles and activities involved in job placement, WBL, and employer engagement and are intended to document some common agreement on what these processes look like, how technology supports them, and the possibility for regional coordination. The process maps are included in Appendix G and include:

- Job Placement
- WBL
- Employer Engagement
  - JPCM and WBLC outreach to employers
  - Faculty outreach to employers
  - Employer outreach to colleges

An effort was made to document the processes at a high enough level to accurately define a consensus on approaches across colleges while being mindful that variations will exist at a more detailed level on the individual campuses. Some colleges have developed their own specific processes for conducting the mapped activities, so the process maps are intended to be a resource to guide colleges through their own needs assessment on their current practices and to identify where additional supports or process development is needed at their college to support the regional consensus. Some process maps simply capture the way things work currently; other process maps represent a departure from current practice and may require a paradigm shift for successful implementation.

See Appendix H for a sample worksheet that supports colleges in using the process maps to conduct a needs analysis on current campus practices and identify areas needing adjustments or refinement.

## 3 Implementation Recommendations

### 3.1 What We Know About Successful Implementation

Successful implementation is a slow and steady process. “Treat implementation as a process, not an event; plan and execute in stages” (Education Endowment Foundation, 2019). Fortunately, there is a large body of research on effective implementation approaches to inform tool adoption strategies.

Highlights include:

- **Start small, focusing on something manageable with immediate utility.** If a tool offers multiple features, begin with the one that will generate the most buy-in at the outset. As comfort levels increase, move on to implement additional features.
- **Support a differentiated approach to address the need.** It is important to recognize that some colleges have technology tools already in place, as well as initiatives underway to adopt new tools and systems. Therefore, each college will have a different starting point for implementation and will require a differentiated approach.
- **Don't overlook the importance of defining or updating offline processes, protocols, and job responsibilities.** Too often the focus of a new tool adoption is on training on how to use it without considering the impact of the tool on current processes, job responsibilities, and protocols. An examination of how things work currently and then identifying what needs to be updated will be key.
- **Link the new tool with an established process or activity.** If there is a clear connection with a familiar or accepted practice or process, it will be easier to integrate its use, than if it requires a parallel set of tasks or activities that are not clearly relevant to overall workflow.
- **Set expectations.** As soon as the tool is launched, set expectations that it will be used. Look for opportunities to model the use of it or find “teachable moments” to move people away from how they do it now, to the new way of doing business. Also, avoid opportunities for “work arounds.”
- **Identify “the why.”** Be clear about the problem the tool is solving and why it will improve workflow, communication, data management, and so on.
- **Identify influencers, not necessarily early adopters.** In the early stages of implementation, focus on organizing “a network of champions” who are fully invested in the initiative. “It’s most important not that early adopters adopt, but that influencers adopt” (Capterra Blog Post, June 8, 2017).

In order for technologies to gain the kind of foothold that could lead to substantial improvements..., colleges must ensure two things. First, the technologies must be used to restructure the student experience, not merely to improve administrative efficiency. Second, end-users must adopt these tools in their daily practice; merely getting a product up and running will not lead to transformative change.

*Evaluating Your College's Readiness for  
Technology Adoption*  
Community College Research Center,  
July 2014

## 3.2 The Implementation Landscape

The goal of implementing a regional Career and Employer Engagement model supported by technology is bold, especially in a region consisting of 10 colleges, each with unique structures, systems, and organizational requirements. For regional implementation to be successful, it is important to understand the implementation landscape and to develop strategies that will support the differences, address challenges, and incorporate unique needs of each of the colleges in the region. Conducting the readiness assessment will inform this work (see section 3.4.3.4). What we know about the landscape so far includes the following:

- Each college context is very different. Some colleges have well-defined processes, some do not. Some colleges have incorporated the use of technology, some have not. Most colleges have career centers, but some do not.
- Not all colleges are at the same level of buy-in regarding the regional model.
- Of the colleges that currently have tools, transition to a new tool will present a different set of implementation requirements, including helping current users of these tools to understand the reasons for shifting to a new tool.
- There is some level of technology fatigue due to other technology initiatives (e.g., PeopleSoft).
- IT policies and decision-making policies related to tool adoption vary greatly from one college to the next.
- While there is general buy-in to the concept of a regional model for managing employer contacts, there is reluctance to share current contacts without some assurance of “ownership.”
- Each college has its own set of practices and terminology related to WBL. This requires either for all colleges to agree to some shared principles and language or the technology needs to be highly configurable to allow for each college to approach their process differently.

Those colleges with existing career engagement software, especially those that participated in the Jobspeaker pilot, expressed concern over how to transition from current tools to a new one. Pilot feedback described how challenging it is to implement new technologies on campus. Additionally, some colleges expressed the desire to invest more time in exploring and using what they already had access to, with the assertion that those tools were underutilized. Moreover, current technologies in use already offer a number of tools to support students and staff in career preparation, case management, and WBL and job placement activities. So why change to a new tool?

The work to identify a single tool to be used by all colleges was driven by the overarching goal to implement a regional career and employer engagement model that facilitates equitable access to WBL and job opportunities across the region and colleges; manages communication among the multitude of stakeholders (e.g., Regional Directors, faculty, employers, WBL Coordinators, career center staff, Job Placement Case Managers); collects and tracks data for both reporting and regional improvement efforts; produces real-time reports; manages student profiles and skill attainment; and supports efficient engagement and recruitment processes for employers. A single tool minimizes burdens for

employers seeking to engage and recruit across multiple campuses, while supporting a regional approach to workforce and economic development.

Given this regional approach and the extensive research conducted, the option of adopting or continuing with a constellation of separately implemented tools (as opposed to a common tool used by all colleges) would present considerable challenges in reaching the goal as described above. For example, CCN (a tool used by 6 of the 10 colleges) indicated it cannot integrate with other systems, thereby making it impossible to share data across colleges.

### 3.3 Overarching Implementation Recommendations

#### 3.3.1 Identify Implementation Teams and Coordinators

Implementation requires “care and feeding.” Simply identifying implementation tasks to complete, rarely leads to substantive and lasting change. Implementation requires continuous review and management. Therefore, the recommendation is to

- Form an implementation team at each college comprised of key stakeholders who will have time to oversee the implementation effort for their campus.
- Identify an implementation coordinator for each campus who will be responsible for leading the implementation team and serve as single point of contact for the college to facilitate communication around implementation activities. The coordinator should be someone who is directly involved in the implementation work.
- Organize the 10 implementation coordinators to serve as a Technology Implementation Committee for the region to troubleshoot, make decisions, share concerns, work through problems of practice, and engage with the vendor.
- Establish a community of practice for the implementation coordinators and their teams.

#### Regional Support for Implementation Effort

To address the immediate implementation tasks ahead, it is recommended that the region develop a Request for Applications (RFA) to fund time for a dedicated implementation coordinator at each college in support of implementing the regional technology solutions. The RFA should lay out the expectations for the implementation coordinators, such as:

- Participate with other implementation coordinators in regional Jobspeaker implementation activities, including planning and documentation of decisions through the Technology Implementation Committee.
- Coordinate with the regional CRM committee as needed.
- Serve as liaison with their campus IT.
- Lead Jobspeaker implementation activities at their respective colleges, including the college’s implementation team, and providing project management oversight.
- Act as the college’s main point of contact for communication related to regional implementation activities.
- Participate in a Community of Practice (see below).

## Community of Practice

It is also recommended that a community of practice (CoP) be established to support and guide the college implementation teams and coordinators. As with existing CoPs, this CoP will provide a venue for participants to share experiences, discuss common problems of practice, and develop solutions to challenges as they arise. In the early months of implementation, the recommendation is that the CoP meet twice a month, once in person and once virtually. Once implementation activities are well established, the CoP might meet less frequently (e.g., monthly or quarterly). Note that the CoP will not require that all colleges be at the same level of implementation.

### 3.3.2 Develop and Execute Regional and College-Specific Communication Plans

Stakeholders are an important component of a change or implementation process. Communication is key. Therefore, it is important to develop a plan that outlines communication goals and identifies the various, relevant stakeholders, and the details for how best to communicate with them. Start by identifying all the stakeholders that have interest in or will be impacted by the tool adoption. Then, for each describe what they need to know, how best to communicate with them and how often, and who will be responsible. A communication plan worksheet is included in Appendix I for consideration. College-specific plans should be developed as part of their respective adoption and implementation plans (see section 3.4.3.5). Additionally, a communication plan at the regional level should also be developed.

### 3.3.3 Roll Out in Phases

As noted above, implementation should start small and in phases. Below is the recommended order for rolling out the tool adoption across the campuses. Note, this rollout plan may need to be adjusted, once the results of the colleges' implementation readiness assessments are available.

- 1) Everybody represented on the Career and Employer Engagement model
  - a) Director of Strategic Partnerships
  - b) Regional Directors
  - c) Job Placement Case Managers
  - d) Work-Based Learning Coordinators
  - e) Other select regional staff, if appropriate
  - f) Career center staff
- 2) Work-Based Learning faculty
- 3) Students
- 4) Employers

### 3.3.4 Establish a Governance Process

While each college will develop its own technology plan and related campus-specific procedures related to tool adoption, successfully implementing the regional technology recommendations will require oversight and coordination across all 10 colleges. The region should plan for the development of a technology governance plan to address the following questions, document the answers/decisions, and develop protocols, if needed.

#### All Systems

- What are the roles that govern management of regional technology solutions (e.g., Leadership Group, Steering Committee, Stakeholder Group)?
  - What are the criteria for membership?
  - What are the responsibilities for each group as it relates to governance procedures (e.g., what is the escalation chain)?

#### CRM

- Who has access to the CRM and how are decisions made about who gets access in the future?
- Who manages the relationship with the vendor?
- How is the change management process handled for making updates to the CRM's data elements, permissions, or other functional areas?
  - How are enhancement or change requests collected/communicated?
  - How are requests documented (e.g., a central repository like a ticketing system)?
  - Who evaluates requests?
  - How are decisions made about requests?
  - Who makes updates to the software (when updates can be made by end users in the region vs. the vendor)?
  - Who works with the vendor, when necessary, to make updates that cannot be made by end users?
  - How are changes tested before being implemented?
  - How are changes to the CRM communicated with end users?
  - How are related updates handled (e.g., updating the user guide or training materials)?

#### Jobspeaker

- In addition to the same considerations detailed above, how will decisions be made about regional conventions for how the system is used?
- How will regional conventions be documented and communicated with users?
- How will changes to the regional conventions be managed?

## 3.4 Near-Term Planning and Implementation (0–6 months)

In the first six months of implementation, the recommendation is to focus on three parallel sets of activities.

- 1) Implement HubSpot.
- 2) Work with Jobspeaker to improve/enhance the tool to meet the region's and colleges' needs.
- 3) Lay the foundation for implementation at the colleges by conducting readiness assessments and developing college-specific implementation plans.

### 3.4.1 Implement HubSpot

The CRM solution, intended for limited access, and without the challenge of coordinating multiple existing institutional tools and user roles, should be a relatively straightforward technology adoption to make in the near future. It is recommended that HubSpot be purchased for the region to begin building a comprehensive inventory of employer relationships and to coordinate continued strategic employer engagement activities.

Jobspeaker technical staff evaluated use cases for the relationship between HubSpot and Jobspeaker and provided the following feedback to guide the project development:

- From HubSpot: (e.g., an employer relationship is developed in HubSpot; when its status changes to some determined value, it is now eligible to be sent to the Jobspeaker regional hub [or all 10 colleges] as an employer ready to work with the colleges)
  - Once an employer is “qualified” (and ready to be loaded into Jobspeaker), a flag would need to be set in HubSpot so that the download routine Jobspeaker uses can identify these employers.
- Recommendations for frequency of the data deliveries to minimize user impact, etc.
  - Jobspeaker believes once a day is probably sufficient but will address when specifications are developed. Once the integration is built, the frequency should not matter.
- What discovery work needs to be done by the region?
  - There is significant work to determine how this process should work, the data that needs to be exchanged, and the frequency and direction of this data. Here are a few questions we would start with:
    - What happens before the employer is “qualified” and sent to Jobspeaker (i.e., what data is collected about the employer, its employees, processes, expected engagements with the colleges, etc.)?
    - What data they think needs to be sent to Jobspeaker?
    - What is the ongoing engagement using HubSpot with that employer after they are “qualified”?
    - What data (if any) needs to be sent from HubSpot to Jobspeaker after initial load of the company data?
    - How often does that data need to be merged with Jobspeaker after initial load of the company data?

A regional committee should be established to flesh out the adoption plan, timeline, and rollout activities of the CRM, which should include:

- Determining who will have access to the CRM to inform procurement requirements with the vendor
- Documenting the specifications for the CRM, including:
  - Employer record data elements
  - Employer Contact record data elements
  - Other data records to manage, if necessary
  - Permission structure for read and write access on different data elements
- Working with the vendor to purchase the software
- Working with the vendor to set up/configure the software
- Working with the vendor to train users
- Determining what legacy employer data will be added to the CRM
- Managing the collection of legacy employer data, including determining the required data elements and working with data owners to submit necessary details
- Importing legacy employer data
- Documenting agreed-upon protocols for users to ensure consistency and effective use of the CRM
- Contributing to the development of a regional Technology Governance Plan
- Participating in discovery activities to determine the requirements for data sharing between the CRM and the regional career engagement software solution

See section 3.3.4 for related governance considerations.

### **3.4.2 Work with Jobspeakr to Improve/Enhance Tool**

The region should immediately begin working with Jobspeakr to address the recommended product changes identified in Appendix F. The recommended Technology Implementation Committee described above should be established to determine priorities and facilitate decision-making regarding tool improvements and enhancements.

Activities include:

- Evaluate pilot feedback and recommendations
- Document high-level goals and timeline
- Develop functional specifications for feature areas that the region prioritizes for development
- Vet functional specifications with key stakeholders (e.g., JPCMs for case management enhancements)
- Work with Jobspeakr staff to clarify specifications and produce cost estimates
- Develop project phases and timeline
- Develop User Acceptance Testing (UAT) plan with Jobspeakr staff for new/revised features
- Complete UAT activities
- Communicate with stakeholders at the colleges about all progress

### 3.4.3 Lay Foundation for Regional- and College-Level Implementation

#### Adopt/Agree to Guiding Principles for Implementation

A draft set of guiding principles are described in section 2.3.1 above. While a number of stakeholders across the region were involved in their development, it will be key for stakeholders on each campus to understand and adopt these principles. Once adopted the principles should guide discussions about which processes at the campus level will need to be adjusted or created in order to support implementation of the principles.

#### Expand and Operationalize Process Maps

High-level process maps were developed (see section 2.3.2), also with a number of stakeholders across the region, representing all the colleges. It will be important for each college to review these maps and expand and operationalize them for their campus. Specifically, for each, the college implementation teams should consider the following questions as they review each step in a process map. A sample worksheet is included in Appendix H.

- How does the step happen (e.g., in person, by phone, via email)?
- Who is involved? Who needs to know about this? How will they be informed?
- What information should be documented? In what format? Where will it be captured? Who needs to see it?
- When should this happen? Is it time sensitive?
- What is this connected to?
- What happens next (if not already represented in the process steps)?
- What systems, structures, processes, need to adjust in order to implement this step in the process on your campus?

#### Define Roles and Responsibilities

A third important step in laying the foundation for implementation is defining the roles and responsibilities of everyone who will be involved in the career and employer engagement processes. Below we outline recommendations for key roles.

**Process Recommendations that Inform Roles and Responsibilities.** Summarizing the roles illustrated in the process maps, the following are recommendations for high-level descriptions of how these roles could operate under the new career and employer engagement model (and how technology is used to support the processes).

- Regional Directors (and other key job developers at the colleges) manage employer relationships in the CRM until the employer is ready to engage with colleges.
- An employer contact is moved to the career engagement software when Regional Directors determine that the employer is ready to engage, at which point, the employer information is shared with all colleges (unless otherwise defined).
- Employers or colleges enter opportunities into the regional career engagement software and those opportunities are shared across all 10 colleges (unless otherwise defined).

- Notifications support communication with the colleges when employers or opportunities have been shared across the region.
- Reports support Regional Directors tracking activities that take place in the regional career engagement software (e.g., open opportunities by employer or by sector).
- The regional career engagement software is used to support classroom activities, WBL participation, employment preparation activities, and employment.
- Students report their skills attainment, including 21st century skills, in their career engagement software profiles.
- The career engagement software supports WBLC processes and tracking activities for regional reporting.
- The career engagement software supports case-managed job placement and tracking placements for regional reporting.

### **Regional Director Role and Activities**

- RDs and others maintain employer engagement activities in the CRM while developing relationships and determining how employers want to participate in the region
  - The CRM will have a setting to note when an employer and/or contact within an employer record are ready to be shared across all 10 campuses
- Data are transferred from the CRM (through an automated data connection) to the regional career engagement software and made available to all colleges
  - Notifications are sent to key individuals on campus when new employers added (e.g., could be filtered distribution based on sector, associated programs, etc.)
- Data from the regional career engagement software is sent back to the CRM or reports are available within the career engagement software for RDs to see how many/types of opportunities offered by active employers (by sector, etc.), how many placements are made, etc.
- RDs access the regional career engagement software to see the types of skills requested by employers (by sector, etc.)
- RDs access the regional career engagement software to see the types of skills acquired by students (by sector, etc.)
- RDs communicate identified skills gaps to WBL coordinators, JPCMs, and faculty in a systematic way

### **Work-Based Learning Coordinator Role and Activities**

- WBLCs use the regional career engagement software to locate existing WBL opportunities to support students/faculty in placements
- WBLCs have access to the employers in the regional career engagement software to see what activities they have agreed to engage in to support matching employers to students/faculty looking for WBL opportunities
- WBLCs add opportunities to the regional career engagement software as work progresses with employers in developing WBL activities, which are shared across all 10 colleges

- WBLCs use the regional career engagement software to support students and faculty in locating WBL opportunities
- WBLCs use the regional career engagement software to document required regional data elements
- WBLCs use the regional career engagement software to coordinate with JPCMs about employer outreach and cross-marketing efforts (e.g., document discussions in the employer record, use electronic communication tools, etc.)

#### **Job Placement Case Manager Role and Activities**

- JPCMs have access to the employers in the regional career engagement software to see what activities they have agreed to engage in
- JPCMs add opportunities to the regional career engagement software as work progresses with employers in posting jobs, which are shared across all 10 colleges
- JPCMs use the regional career engagement software to support students in their preparation and placement activities
- JPCMs use the regional career engagement software to document case management information
- JPCMs use the regional career engagement software to document required regional data elements
- JPCMs use the regional career engagement software to coordinate with WBLCs about employer outreach and cross-marketing efforts (e.g., document discussions in the employer record, use electronic communication tools, etc.)

#### **Career Services Staff, Faculty, and Other Campus-Level Staff**

- Career services staff, faculty, and other campus-level staff prepare students for work-based learning and jobs and may indicate “readiness” in the career engagement software
- Faculty and other campus-level staff send notifications to students about events or opportunities of interest
- Career center staff provide assistance to employers and students with program navigation and will provide assessments and general exploration activities with students

#### **Employers**

- Vetted employers have access to post WBL and job opportunities in the regional career engagement software, which are then shared with all 10 colleges
- Employers use the regional career engagement software to review applications and/or search for qualified candidates to reach out to
- Employers use the regional career engagement software to register for events like career fairs
- Employers use assessment tools in the regional career engagement software to provide feedback on WBL experiences
- Employers may use survey tools in the regional career engagement software to verify alumni employment details

## Students and Alumni

- Students use the regional career engagement software to maintain their profiles, resumes, and other career-related documents (e.g., cover letters, links to portfolios)
- Students use the regional career engagement software to locate and register for events of interest
- Students receive notifications from staff and faculty about events or opportunities they might be interested in
- Students use the regional career engagement software to locate and apply for job and WBL opportunities
- Students and faculty use WBL process management tools in the regional career engagement software to support WBL processes and documenting any required regional data elements
- Alumni respond to surveys to provide post-graduation information to the college
- Alumni use the regional career engagement software to look for jobs, sign up to be mentors, or register for events

## Conduct Implementation Readiness Assessments for Each College

With variations at each campus in implementation landscape considerations, an important step in preparing for the adoption of a regional software solution is the completion of a technology readiness assessment which will inform the development of a college-specific implementation plan.

Each college should examine a number of readiness areas to support the development of an implementation plan. Readiness is addressed from a number of perspectives, not all strictly IT in nature. A variety of assessment tools may be used for this purpose, starting with the process mapping worksheet, which focuses on current career and employer engagement practices at the college. Other tools may be used specifically to address both organizational and technical considerations as they relate to new technology adoption.

For example, *Evaluating Your College's Readiness for Technology Adoption* (Karp & Fletcher, 2014) is a self-assessment tool based on the Community College Research Center's Readiness for Technology Adoption (RTA) framework that provides a helpful way to organize and evaluate readiness components around both technical and cultural considerations. It is organized into four areas of readiness: technological, project, organizational, and motivational readiness.

The RTA framework presents a set of research-based indicators that are related to the likelihood of successful reform and focuses on adoption considerations beyond IT and project management capacity. Colleges can use the assessment to determine where they need to focus their efforts during the implementation process.

The region may find the RTA framework assessment a valuable tool to use (or adapt) and should aim to use the same assessment tool(s) and process across all 10 colleges for consistency.

Readiness assessments developed should consider areas such as:

- Stakeholders' openness to process and technology changes
- Organizational structure governing roles in the regional employer engagement process maps
- Organizational structure governing technology decision-making
- Capacity to effectively communicate project goals and progress with key stakeholders
- Capacity to assign project leads, system admins, or key end users, and support the time needed to participate
- Capacity to train and support other end users
- Location, availability, and quality of existing data that might be needed to populate the systems (e.g., employers, opportunities, course catalog/skills, students)
- Capacity on campus to use higher-touch IT integrations (e.g., course data API; Canvas integration)
- Other technology initiatives or projects at the college that might impact this project

In addition, colleges should examine their current use of technology solutions related to employer and career engagement processes and document considerations related to transitioning from one tool to a new one, such as:

- Current vendor contract(s)
- Technical activities related to closing out those tools and resources needed (e.g., IT time to archive data, etc.)
- Impact to current users, including students and staff, related to the transition: how embedded are the current tool(s) and what transition plan is needed for these users?

The assessment process should involve broad representation across functional groups on campus, including key stakeholders, current users (if the college has existing tools to transition), and future end users. It may be completed through a variety of approaches, such as:

- A college committee developed to address assessment questions and document results
- Workshop-style activities to convene stakeholders and future end users to address assessment areas
- Interviewing key personnel (e.g., IT)
- Use of external consultants that assist colleges in organizing these types of discovery and assessment activities

### [Develop College-Specific Jobspeaker Adoption and Implementation Plans](#)

When complete, the results of the assessment will help colleges personalize and refine their implementation and adoption plans for any additional challenges identified. If the college has an existing integrated technology plan, the Jobspeaker Implementation Plan should be incorporated into the campus-wide plan so that shared resources, dependencies, and other considerations are coordinated across initiatives.

Jobspeaker Implementation Plans should include:

- Key roles and responsibilities
- High-level timeline

- Goals and strategies that organize discrete tasks related to the implementation and adoption of Jobspeaker (e.g., *All career center staff will be fully trained to use Jobspeaker by March 2020*)
- Action items (e.g., *Conduct career center staff training workshops*), including:
  - Start/end dates
  - Person responsible (e.g., *Implementation Specialist*)
  - Who is involved in the action item (e.g., *Jobspeaker account manager + all career center staff*)
  - Resources needed (e.g., *Access to computer lab for 1 day*)

Action items that will be required for all colleges to successfully implement and adopt Jobspeaker should be documented in a Regional Jobspeaker Implementation Plan so that colleges have a working template to start from.

Examples of action items during the first implementation phase include:

- Develop campus implementation team to participate in meetings, planning activities, and other tasks
- Establish a meeting schedule for committee check-ins
- Conduct kick-off meeting
- Develop communication plan
- Develop training and support plan
- Action items to address IT or organizational challenges identified by the readiness assessment (e.g., *Procure IT approval to access CurricUNET data*)
- Action items to address transition from current tool(s)

Examples of technical action items to address in the first implementation phase include:

- Prepare course data to Jobspeaker for installation
- Define Jobspeaker configurations
- Define roles and permissions for identified users
- Conduct training for key college administrators
- Archive/export data from current tool(s) as needed

### Develop Technical Assistance Plan

The individual college implementation plans should be analyzed to determine technical assistance and professional development needs of each college in order to identify necessary supports for the implementation process. Technical assistance might range from one-on-one consultation to meeting facilitation, stakeholder engagement, and protocol development.

### 3.4.4 Develop Connections to Other SWP Projects

The discussion around career and employer engagement processes and supporting technology intersects with a number of other project focus areas and technologies. There are overlapping and related functional requirements addressed in these separate projects and careful attention should be

paid to how these technology discussions are related and how to create coherence around shared or coordinated technology requirements.

### K12 Pathway Mapping and Career Exploration

The Career Pathways workgroup has been focusing on building requirements for an interactive K12/Community College Pathway mapping tool that can be used by different stakeholders (e.g., career counselors, educators, parents, students). The technology discovery is part of a larger set of tasks focused on developing and implementing a regional career pathway development strategy linked to key industry sectors and Guided Pathways themes in the region. This includes mapping and assessing current activities at each college and its feeder schools; developing guidelines for pathway development; and supporting K12 districts and colleges in pathway development.

A series of stakeholder engagement meetings was conducted with both K12 and college representatives to organize feedback based on user personas and the needs of different audiences, including students, parents, K12 and CC counselors and educators, K12 district leaders/administrators, and college program directors.

Feedback from stakeholders shows a desire for a comprehensive regional system that would align K12 pathways, community college pathways, and local labor market data, so that prospective students are able to determine their best education and career options. In addition to “maps” of how K12 pathways connect to community college pathways, stakeholders expressed interest in career exploration tools that provide users with details about specific careers, such as education needed, average salary, and future outlook. It is yet to be determined if there will be a regional tool for career exploration offered as part of the K12 Pathway mapping system, as part of the regional website, or another system altogether, but schools and colleges are interested in knowing what these plans are so they can eliminate redundancy.

Most career engagement systems have career exploration modules built in, such as Jobspeaker’s “uExplore” section, which uses Burning Glass data to display career cards to students for exploration purposes, and its planned integration with Awato for more robust assessment and exploration tools. Similarly, many student success and engagement tools feature career exploration modules (e.g., Starfish’s PAIRIN Assessments) as the first step in career/education planning. Feedback from students in the Jobspeaker pilot shows overwhelmingly that students find these types of tools/modules critical to their career research process.

At the same time, colleges want to provide accurate career information to prospective and current students (especially where it aligns with related programs that the colleges offer) and many colleges have either recently adopted new tools (e.g., MiraCosta and Career Coach), are exploring use of modules in their existing systems (e.g., Palomar and Starfish’s PAIRIN), or are in the process of determining which tool(s) to adopt on their campuses to meet this need.

With potentially three sources of similar tools (a regional career engagement system, a regional K12 Pathway mapping tool, and the college’s own tool investments), not to speak of curriculum-embedded

tools, CDE and CCCC-sponsored tools, and other publicly available tools, a discussion will be needed around this overlapping functionality and how best to meet the needs of prospective and current students with as much coherence as possible.

### Pathway Navigation

Similar overlapping functionality is presented in student success and engagement tools that have been discussed as part of the Pathway Navigation workgroup. Student success tools refer to technology-enabled advising and support systems that improve student retention and completion rates. Pathway Navigation may be supported by a broad category of tools and systems that encompass a number of functional areas, touching every segment of the Road to Success graphic. Often the tools are combined as into integrated systems that address a number of functional areas. Tool categories explored under the Pathway Navigation workgroup include:

- Intake/onboarding
- Career exploration
- Career and degree planning
- Career preparation
- Early alert systems
- Advising/case management

Colleges that are in the middle of implementing these types of systems are likely to find the career preparation, career exploration, and case management features in career engagement systems to be redundant or extraneous. Again, discussion is needed to address the redundant feature offerings in the tools being explored in Pathway Navigation efforts and the career engagement tool being recommended for regional adoption.

### Connection to 21st Century Skills Project

Each of the 10 colleges has identified Institutional Learning Outcomes (ILOs) and core competencies that graduating students are expected to have mastered. The competencies vary only slightly from one institution to another and are consistent with the 21st century skills cited by educators and employers as critical to student success. The skills and competencies currently being discussed as the focus of intentional development include a combination of competencies identified by the 10 community colleges in the region, New World of Work (NWoW), the National Association of Colleges and Employers (NACE), and LinkedIn Learning. They align with the skills identified by the 2018 World Economic Forum *Future of Jobs Report* as the key skills that are growing in prominence and are also consistent with the cross-sector employer needs identified by the San Diego Strong Workforce Partnership and Imperial County Workforce Development Board (2017) as “essential for securing and retaining employment.”

Developed by the 10 colleges, the *General Principles for 21st Century Skills Instructional Approaches* include the following steps to help ensure students learn, demonstrate competence, and receive recognition for learning the skills:

- Integration of skills into curriculum
- Assessment of skills
- Authorization (faculty certification of student completion)

These steps are supported by career engagement technology in the following way. As detailed in section 2.2.1, Jobspeaker skills are pulled from CORs. These are the skills that then appear in the Jobspeaker profiles of students completing those courses. The skill names (e.g., communication or collaboration) serve as keywords for the employers to search for candidates possessing desired skills. Ideally, these skills would appear in the course descriptions so that employers could find the candidates who acquired these skills through related course completion. This could also reinforce for faculty the value of these skills in the workplace. Similarly, employers may need to be provided a checklist of skills from which to choose so that keyword searches yield the desired results.

### Connection to Regional Data Collection/Reporting

The WBL & Job Placement Workgroup will be working towards recommending the detailed regional data collection elements related to WBL and job placement to inform the specific configuration and application of the CRM and regional career engagement software. The two tools, if implemented regionally, can accommodate the collection of data such as:

- Number of employers
  - By sector
  - By type of engagement
  - By number of opportunities
- Number of opportunities
  - By sector
  - By type
  - By employer
- Most desired skills
  - Reports on skills listed by employers in their job postings by sector or occupational codes
- Skills associated with courses/colleges' students
  - Reports on the skills listed on student profiles
- Job placement data
  - Occupation
  - Employer
  - Wage
- WBL
  - Type of opportunity
- Alumni surveys (potentially improve on the return rate of TEOS)

### Connection to K12

While the focus of this study was the community colleges, K12 LEAs are also seeking to expand WBL opportunities. K12 LEAs also have multiple options. Further exploration is needed to see if Jobspeaker would be appropriate for some LEAs or if K12 tools might link to Jobspeaker.

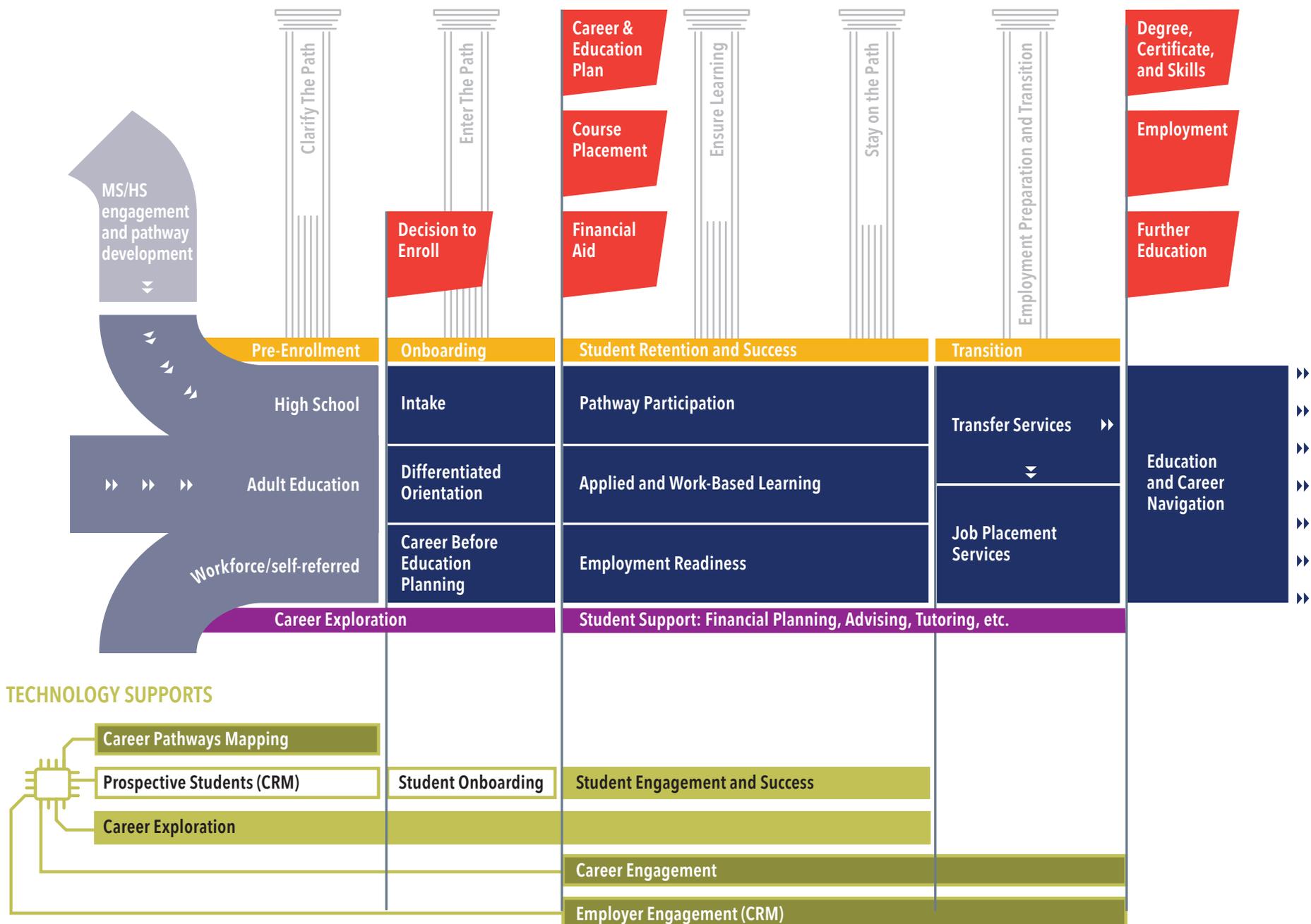
### **3.5 Next Phase (7+ months) – Full Implementation**

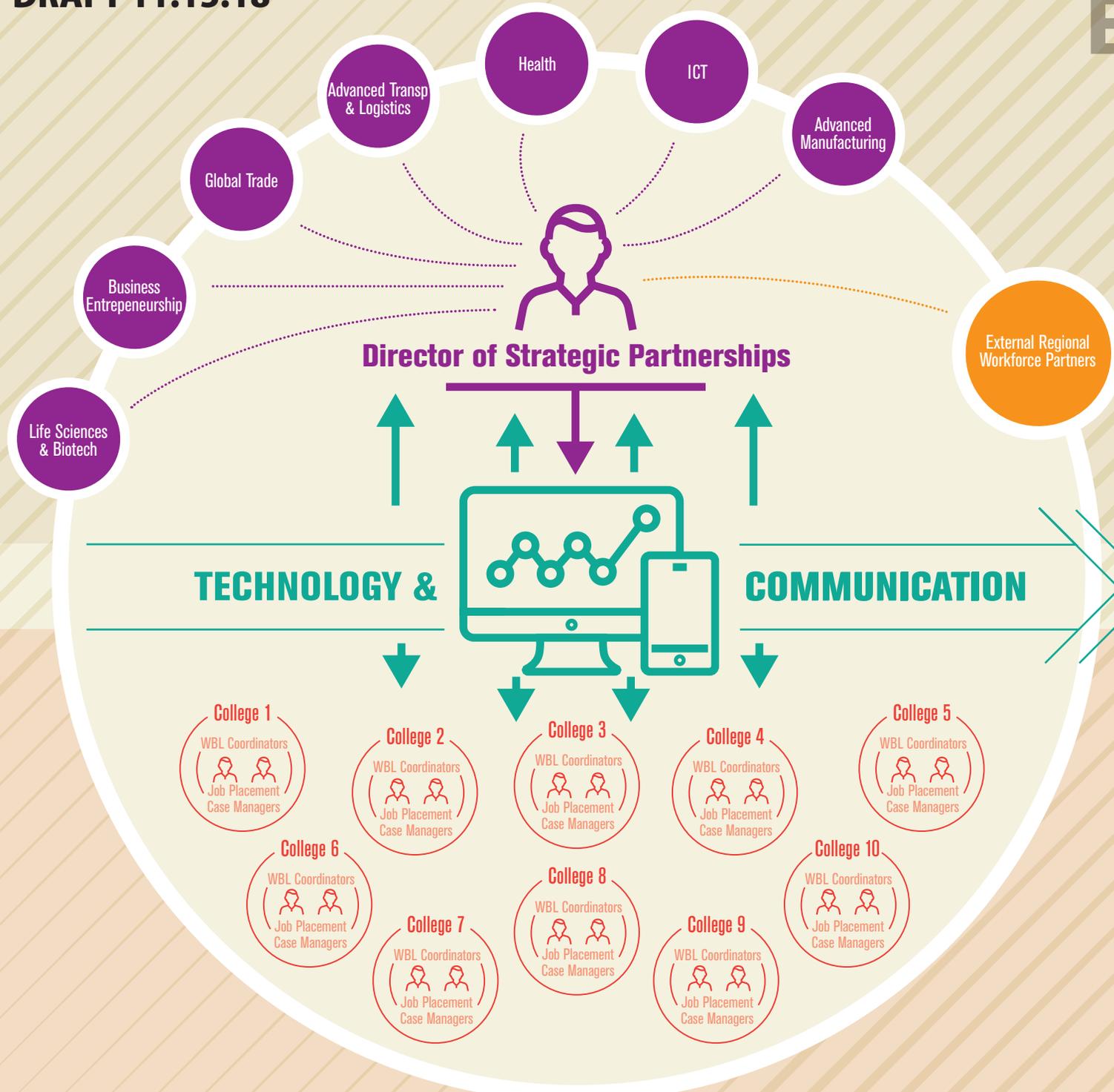
Once the initial planning and implementation phase is complete and colleges have developed their college-specific Jobspeaker adoption and implementation plans, colleges should be ready to implement their respective plans. This may take several months beyond the first phase. During this phase, communication will be critical — at a given college and across the region. Additionally, as implementation continues it will be important to regularly review progress and make adjustments if needed; further develop the community of practice, allowing colleges to share and learn from one another; provide tailored technical assistance; and maintain a high level of project management through the technology implementation committee and respective college implementation teams.

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# A Community College Student's Road to Success





**COLLEGES**  
Completion, Job Placement, Wage Gains

**EDC**  
Double Annual Degreed, San Diegans to 20k

**SDWP**  
Reduce Turnover, Upskilled Workforce, Informed HR

## APPENDIX C: CRM Requirements

Last updated 9/12/19

### Scoring Guide:

0 = required feature not present

0.5 = required feature somewhat present but missing some functionality

1 = required feature fully present

1.5 = required feature has enhanced elements

### Employer/Contact Information Management

ID	Requirement	Notes	Score
A1	Ability to create employer profiles with standard RFI details like: <ul style="list-style-type: none"><li>• Address</li><li>• Sector(s)</li><li>• Website</li><li>• Phone</li><li>• # of employees</li></ul>	Will require protocols for users (e.g., naming conventions, etc.)	

ID	Requirement	Notes	Score
A2	Employer profiles have a place to collect/view related sector(s)	List is customizable Sectors are multi-select on employer profile	

ID	Requirement	Notes	Score
A3	Employer profiles have a place to collect/view which colleges have relationship with employer	Perhaps college + types of engagement/activities with each college Also include who at each college the employer communicates with (name, role, and contact info)	

ID	Requirement	Notes	Score
A4	Employer profiles have a place to collect/view types of engagement offered	From a multi-select list including areas such as jobs, internships, classroom presentations, job shadows, etc. Space to indicate Notes such as dates desired/available for each	
A5	Employer profiles have a place to collect/view the owner and rules of engagement for that employer	Shows the individual's name, role, association (e.g., "DSN" or the college affiliation), and contact info and then narrative on how that employer relationship is handled (e.g., all communication goes through the owner or employer may be contacted by colleges) (Could use a Notes field for this)	
A6	Matching on a unique ID to prevent duplicates being created	Need to limit the number of duplicative records by building in tools to support users locating existing employers. When a user does not find the employer, the system matches on a field (e.g., company website) or combination of fields to identify potential matches before creating a new record.	

ID	Requirement	Notes	Score
A7	Lead Management – Ability to input and track employees/contacts associated with organizations (with their contact info)	Associate employees with employers or vice versa; searching to locate either orgs or people Multiple fields (in case of multiple contacts); include the last update date	
A8	Ability to note particular sector(s) that a contact represents (when an employer has multiple)		
A9	Open fields for notes on employer and contact records	Flagging feature	

### Differentiated Access

ID	Requirement	Notes	Score
B1	Dashboards	Types of data frequently needed for meetings and reporting requirements (e.g., # and types of engagements, etc.) Different types of users have different views; (e.g., WBLC and JPCM): open opportunities and info about students vs. regional overview/counts Custom dashboards by data entered/ supervisor data or by sector (nice to have for custom built)	
B2	Limit access to employer/contact records until the record owner is ready to share	Ability for the owner of an employer profile or contact record to hide that record from others' view until a status change "releases" it to view by others (Related to C6)	

### Process Management

ID	Requirement	Notes	Score
C1	Tasks/Follow-Up	Create tasks with timelines and people responsible Associated with organizations and leads, events	
C2	Email Tracking	Ability to log an email to an org or person record via BCC (nice to have: match on email address to find associated record in the system)	
C3	Meeting/Appointment Tracking	Dates, who did what (standard options for reporting)	

		Might also want to store interactions with students: case management tools to track student meetings, phone calls, etc. (need campus staff to weigh in on existing tools and what's needed) Set follow-up tasks	
C4	Call Tracking	Dates, who did what (standard options for reporting)	
C5	Activity tracking (WBL, etc.)	Documenting what the employer engaged in (e.g., presented at XYZ on Date); might be handled in Career Engagement tool	
C6	Ability to move employers through a sales process	Categories/status for an employer that relate to where they are in their engagement. For example: <ul style="list-style-type: none"> <li>• Lead</li> <li>• Prospective</li> <li>• In communication</li> <li>• Active</li> </ul> + Ability to customize the terms + Options should be clear and concise (implementation note)	

**Notifications/Messaging**

ID	Requirement	Notes	Score
D1	Campaign Management/functions like Constant Contact	Create campaigns, designate recipients, and send from within the same system (as robust as campaign tools like Constant Contact and MailChimp). <i>Nice to have.</i>	
D2	Send Alerts	Connected to tasks; reminders about timelines; outside of the system (email or app alerts) that doesn't require logging into the system	
D3	MS Outlook Integration	Related to the email tracking	
D4	Shared Calendar	Events, appointments integrated with calendar (export to iCal/Google/etc.)	

## Other

ID	Requirement	Notes	Score
E1	Reports	Activity reports on all types of data Sector reports Ability to design and run custom queries Canned reports for easy running (especially for metrics TBD) Ability to run reports by institution, district, region, and by sector for # of contacts/relationships	
E2	Mobile App	<i>Nice to have</i>	
E3	Data Share (both directions) with current system(s)	Depends on use of multiple systems (e.g., a separate CRM) + a job placement site (if not the same system) <ul style="list-style-type: none"> <li>• Career engagement tool: import/export employer records; opportunities; contacts</li> <li>• SWP: share jobs with their Salesforce system</li> <li>• EDC's system</li> </ul> If it communicates both ways, notifications in CRM about status of sending and receiving	
E4	Speech to text functionality		

## Implementation

ID	Requirement	Notes	Score
F1	Training provided		
F2	Ongoing on-call support provided		

# Appendix D: Product Dossiers

## Career Engagement Tools

### GradLeaders

#### *Rubric Scores*

- Background/ Overview: 9
- System Features: 50
- Accessibility & Usability: 24
- Technical Considerations: 15

#### **Overview:**

A robust employer preparation, job placement, and career services tool covering the range of tools across the pathway. They reported extensive improvements over the last two years, implementing best practices in career engagement; robust self-assessment, job market, 21st century skills, and addressing job searching skills and financial literacy. Feature and reporting list is extensive.

#### **1. College Consortium/Networks:**

Can set up 3 different ways

- a. 10 colleges treated as separate systems
- b. Admin system shared by 10 college setups (would share employers)
- c. Single consortium setup

*Note: Shared example of regional setup in Hawaii but didn't see it.*

#### **2. Student Entry and Interface:**

- Student dashboard with extensive list of tools
- Employment preparation
- Job-seeking tool; jobs matched to interests, skills, field of study
- Career research tool
- WBL tool called “experiential learning” – a robust tool built out in the last couple years
- Candidate Score Card – all tracking of activity

#### **3. Case Management Tools:**

##### **Strong set of case management tools; workflow to do list**

- Select groupings of students to email, connect with, recommend job, etc.
- Career tracker – to do list (advising, update profile, job search, with due dates)
- Resume tab – builder and review process

- Notes tab for admin/advisors
- Events and calendar
- Jobs – new listings matched to student profile of goals, needs, etc.
- Activity tab – Tracks metrics on students: last use date, # logins and steps to complete, profile/flow, advising appointments, workshops attended, etc. Extensive score card tracks all students’ activities, engagements, etc.

#### **4. Build Functionality Based on Needs: flexible, customizable**

- Focus on the phrase “configurable” not “customizable”
- Highly flexible – integrated tool with existing institutional software systems
- Customizable fields, form contents, email messages
- Branding for schools – adds logo
- Many canned reports but also custom reporting available. Search and filter, then export function.
- College can create their own automated workflow for WBL opportunities and permissions
- Uses “Looker” for graphics and analytics

#### **Vendor Impressions:**

The tool has extensive functionality required but also doesn’t have an interface that seems CC appropriate or as engaging as it could be, especially to students. I don’t think there is much of anything that the tool cannot do, but it is not clear to me what is standard and what is a special configuration or add-on tool.

Customer service representatives were very responsive with two demos and follow-up questions posed by phone/email.

# Handshake

## Rubric Scores

- Background/ Overview: 8
- System Features: 48
- Accessibility & Usability: 25
- Technical Considerations: 15

### Overview:

Handshake is a college/career network or “career services platform” geared toward giving students and job seekers access to a wide number of potential employers, and employers access to a range of students. It has a student, admin, and employer interface. Handshake’s focus has been 4-year institutions with more recent buildout of features more specific to community colleges.

### 1. College Consortium/Networks:

- None noted
- 22 community colleges working with them
- Early in partnerships with them

### 2. Student Entry and Interface:

The student interface looks and acts a lot like LinkedIn (student profile includes highlighting academic accomplishments, skills, work experience, and extracurricular activities). The focus is on the open network to showcase work range of experience in profile. Strong job seeker features with wide range of jobs banked. The tool appears to offer all the same kinds of things that a career center would. Shows students events, networking opportunities, mock interviews, resume support, “job” searching (which presumably would be adaptable to include all kinds of WBL activities).

### 3. Case Management Tools:

Case management functions include tasks related to career services, career engagement, and onboarding as part of the “case.” Workflow described allows bringing in other tools’ data to complete this picture into the single platform/dashboard. (Note, didn’t see this firsthand but taking their word for it). A range of permissions allows admin users (including faculty) to refer or endorse a student, enter a WBL experience. Uses “Looker” technology for data visualization (like Tableau).

*Note: They focus on “internships” when we talk about WBL so assuming we can insert the range of activities that are similar, but this is a place where the CC focus isn’t quite integrated.*

### 4. Build Functionality Based on Needs: flexible, customizable

- Customizable fields, form contents, email messages
- Community colleges would need to manage/export or import data from other systems or work with Handshake on their specific needs to bring data together

- Tableau-like tool for data visualization, called “Looker”

**Vendor Impressions:**

It looks like LinkedIn for college students and recent graduates with a focus on highlighting things that are relevant to this niche of job seekers. Handshake representative admitted they are very 4-year-college heavy, just getting into the CC space with about 22 in the system now and in early stage of partnerships with CCs. They said their focus the last 1.5–2 years has been on the employer side. One thing that sounded different than other tools is the career research/exploration tool where users can explore a job role using crowdsourced data. If other tools are using crowdsourcing to gather these data, it wasn’t obvious (salaries, locations for avail. jobs, openings). It is a new feature launched Fall 2019.

Customer service representative was responsive to needs/questions, and really honest about their more recent push into the CC universe.

**Notable info:**

From 2017 article in Inside Higher Ed.

*Handshake has gained traction over the last three years. Now headquartered in San Francisco, the start-up has raised \$34 million in venture capital funding, according to Crunchbase. Today, more than 160 colleges use the start-up’s platform to run their career centers.*

*Colleges typically see the number of companies interacting with students double or triple after switching to Handshake, and a 30–40 percent increase in students interacting with the career center, Lord said.*

*The University of California, Berkeley, began using Handshake in 2016. Thomas C. Devlin, executive director of the career center, said in an email that the platform “substantially increases student engagement with the career center.” He was traveling and could not provide exact numbers, but added, “Simply, we find Handshake to be the new superhighway for career-minded students.”*

# Jobspeaker

## *Rubric Scores*

- Background/ Overview: 10
- System Features: 50
- Accessibility & Usability: 25
- Technical Considerations: 15

## **Overview:**

Jobspeaker began in 2009 to help people find work and get the education needed to lead them where they want to go. Jobspeaker’s goals are to connect:

- Common language – skills taxonomy (student, institutional, employer)
- Connected Services – career preparation, virtual coach, communication tools
- Supporting Infrastructure – High School, Workforce Board, Community Colleges, 4-Year Colleges, Jobs on one platform, integrated to help individuals gain the skills needed to move forward into/in their careers

Jobspeaker uses a “lifecycle” approach — with guided pathways for a career lifecycle from student to apprentice to employee to employer, including veterans and adult learners, to gain skills that enable them to move forward in their careers wherever they are.

Jobspeaker cites their differentiating factor as being actively engaged with customers, in conversations on campus of what clients are getting, how they are using Jobspeaker and if it meets their needs, and feedback for improvements.

## **1. College Consortium/Networks:**

Jobspeaker is a network that:

- Is available to anyone and everyone on campus
- Breaks down silos
- Automates connections
- Collects and shares data
- Integrates with campus & employers across the region
- Allows download of data for own reports

## **2. Student Entry and Interface:**

Jobspeaker provides a robust mobile app for students (the default choice of most students) that walks them through each step and engages them with a virtual coach to guide through steps of the job search, application, interview, and offer acceptance. The **Job Seeker** app manages all in one place and includes:

- Jobs matched to students
- Events, career fairs, mock interviews – view, rsvp, get notifications, submit timesheets
- Hints, tips, notes from advisors, etc. – messaging

### Student Job Board:

Jobspeaker has an “Opportunity board” of activities that help students get in the job market, including:

- Listings for jobs, internships, on-campus recruiting, apprenticeships, WBL opportunities, etc.
- uExplore labor market search – search by skill, type of career (e.g., Medical, Javascript)
- A tiered job board – employers w/relationships w/college appear first, then employers connected w/Jobspeaker, then jobs from other jobsites (20,000 sites across nation)
- National labor market data (will show regional data) and ability to look for specific career, or similar career. Look at demand, # jobs, average salary, certifications needed.

To search for opportunities, students select skills, a specified radius location, job type (full/part time, internship, etc.). They can click for information on any results, save, apply (attach resume & profile) – can do all from the mobile app.

The web platform includes a student dashboard with:

- Programs, **courses completed**, what are taking, what need to take
- **Skills & competencies** from courses, listed (badges for completed course skills)
- **Summary of aspirations**, links to social media, portfolio/project links, skills/competencies (can choose which appear in each profile, add), experience, education, interests & co-curricular activities
- Ability to enter additional skills to profile
- **Profiles:** create as many as like, decide visibility to others (targeted profiles)
- **Resume generator** for printing – will be adding multiple templates (now 1 standard format)
- Resume automatically goes in student’s **document library**, can also upload self-created resume and other docs (portfolio)

Each student can decide what they want to display to various audiences; can create multiple profiles and resumes and add custom information in addition to what Jobspeaker generates.

### 3. Case Management Tools:

When administrators or faculty log in, depending on assigned roles, they will see:

- Recent jobs needing approval (if required, some or all employers may need approvals)
  - Approve & post, or reject & send a note to employer, or approve & send to targeted individuals/groups but don’t post on job board
  - Share jobs with students (all, individual, alumni) cohorts, programs, individuals
  - Copy & repost recurring jobs (every semester)
- Review applications from students
- See who applied for jobs, interview schedule, profile & resume provided – override at any step if desired
- Upcoming events (can also send to targeted students/groups)
- Student availability schedule (for interviews, work, internal & external roles) to avoid conflict with class schedules

Job/student tracking – employer can see as well, and note if interviewed, if hired or rejected

### Work-Based Learning:

- Post opportunities

- Print agreements (disclaimers, descriptions, paid/unpaid, etc.)
- Auditable & legal

**Communications:**

- Auto-message alumni (or other groups) on schedule, ask what are currently doing, send links to use the service
- Sort current students/alumni, message individually or groups or all
- Track which alumni are mentoring students

**Student Verification – uVerify:**

- How they communicate with alumni
- Allows employers to verify employment/check reference
- In intervals, send email to groups

**Work-Based Learning:**

Features for additional “WBL” experiences – college decides which parts to use:

- Tracking program, course, position, job type, company, salary, hours, start/end dates, attachments required to apply, assignments related to the WBL opportunities: Internship, job shadow, mentoring, on-the-job training, clinicals, apprentices, site visits, workshops, industry panels
- Timesheet detail total hours and tasks
- Evaluation as part of the system. Eval on student work habits and any other tools they would want to use. Documents with signatures, print records for student file.
- Complex WBL Flow – Customizable milestones and process for post-hire engagements
- Can add any other type of WBL experience for reporting

**4. Build Functionality Based on Needs: flexible, customizable**

**Technical Considerations:**

With Jobspeaker, the college gets access to all functionality – not piecemeal

- New features roll out to everyone – they can use them if they like
- Integration piece: with campus & employers across region (uses Salesforce, connects with student information system at each campus)
- Download data for own reports
- Other college connection to Tableau – will be extra cost for 3rd-party apps

**Updates Under Development:**

**Other examples of Jobspeaker use/development:**

- **uExplore (beta – implemented by end of year)** – search on skill, role, job, industry to explore careers & jobs – gives data on requirements, salaries, skills req, certs requested, similar jobs, possible job titles
- Mentoring/alumni – Bay Area dev
- Employer hub – San Diego & another region features
- Other colleges doing more with assessment of students up front – getting on the Pathway

**Tech Support:**

## Training

- They do the training – focus on the department or role necessary to train, then they train others (training of trainers)
- **Actively engaged on campus to be sure it fits their needs**

**Funding Structure:**

Roll out Jobspeaker features to everyone who wants them (one system)

- Except if add Tableau or paid platform, available for all but pay for third-party features

**Vendor Impressions:**

Impressive knowledge of audience & clients. Mobile app is comprehensive and designed specifically for student convenience and ongoing use. They obviously know the San Diego/Imperial Counties' needs and wants, since they are currently doing a pilot as part of this project.

## Launchpad

### *Rubric Scores*

- Background/ Overview: 10
- System Features: 48
- Accessibility & Usability: 24
- Technical Considerations: 15

### **Overview:**

Launchpad is a full suite of student engagement, career services, employment preparation and job placement tools, following the student from onboarding to alumni engagement. The tool is built on Salesforce CSM tools, making it a powerful tracking and organizational management option with strong ability to integrate with systems and share back data in sophisticated ways.

### **1. College Consortium/Networks:**

Their experience with CC nearby were No. Orange County Community College District. Can “easily” set up the install for a region as a hub with very specific permissions set up for the colleges, their contacts/students/employers, etc.

### **2. Student Entry and Interface:**

Weren’t able to show (firsthand) the student-facing piece, other than sharing a PPT from another demo, but we have access to a Zoom movie of that experience. Tracks potential and current students with these tools:

- Course/program management
- Training/employment (resume builder)
- Attendance tracking
- Certification
- Opportunity matching (jobs or WBL/career engagement)
- Red flags on the students’ journey

### **3. Case Management Tools:**

Tracks and reports on any student interaction with the tool. Strong communication tools (email or SMS any group or subgroup of students). Addresses student supports received, retention data, jobs, internships or WBL opportunities, employers connected with and career preparation steps engaged.

### **4. Build Functionality Based on Needs: flexible, customizable**

They described that 80% of the tool is common fields/tools (e.g., student info, jobs, employment profiles); and about 20% is usually customized (e.g., change field labels, etc.).

**Vendor Impressions:**

Launchpad appears to have been developed with CTE, workforce development and community colleges in mind, more so than other tools reviewed. The dashboard is the nicest display of data/infographics I have seen in the tools (see below). Given the Salesforce platform, I assume this would be an expensive and student FTE funding option. Their pitch was more “salesy” and less knowledge of the CC systems and needs. The contacts were very responsive and basically said yes to any question asked. That didn’t really always make it clear what was a special configuration and what is standard with Launchpad. That the person we worked with wasn’t able to really dig into the student-facing experience was a little odd and brought about some caution.

## Purple Briefcase (PB)

### *Rubric Scores*

- Background/ Overview: 9
- System Features: 49
- Accessibility & Usability: 25
- Technical Considerations: 15

### **Overview:**

Purple Briefcase is a comprehensive career services management tool from RNL, a provider of higher education enrollment, student success, and fundraising solutions. PB is built from the ground up for career services professionals. Unique, email-based logins for students, administrators and faculty, and employers determine what the user sees and can do. Customizable for each school, the site allows tracking students' completion of activities as they move through an "experiential learning" process to prepare for careers.

### **1. College Consortium/Networks:**

Purple Briefcase can be individualized to each college in a consortium, while allowing employers access to connect to individual schools, or all consortium schools at once. (Connecting with individual schools is free, there is a fee to connect to all schools at once.) Employers enter their job one time for all consortium schools, each school is notified and able to approve the job to share with their students.

### **2. Student Entry and Interface:**

When students first login to Purple Briefcase, they start in "Experiential Learning" where they may start an application, view saved applications, pending activities, current activities, completed, incomplete, or declined activities. PB provides students with an "engagement score," tracking how much a student has done in the system. (Based on a "gamification model," students initially get more points for set-up activities, to encourage them to continue activities and raise their scores.)

Each student has a Profile with skills/attributes, major, interests, LinkedIn connection, resume (post, request approval), favorite (starred) employer profiles, jobs they are looking at and have applied to. Jobs meeting student interests can be "pushed" to their profile. For internships, students include employer information, advisor information, and activities. Students can track daily hours with comments of what they did while working (time card, export to Excel, to be signed by employer). Students also submit documents as needed (reflection, employment forms, etc. – upload docs) and can save a job, apply for job, mark as "my job" if hired – employers can also mark as hired.

Students can participate in "Career Chats": a social sharing and posting forum/social media experience where users from the PB Network campuses can communicate and inquire about best practices as it relates to career management and job search.

Students also save “My links” including:

- My channels – videos on Job Boards, Interviewing, be prepared, every step of interviewing
- Built-in resources: Resume builder & online portfolio
- My Jobs: search based on preferences, area, industry, job function, etc.
- Jobs and Internships tabs – those approved by their school (also access to other job boards, outside of school-approved list)

PB tracks what the student is looking at and what has applied to – type of interaction

### 3. Case Management Tools:

Purple Briefcase provides an admin dashboard so on login admin can see Pending items, such as student/alumni resumes to review, job postings to approve, On-Campus employer connections to approve, etc.

- Faculty sees what a student sees, plus (customizable to each school)
- Faculty can manage & view student activities – see all students you approved
- Can create a communication plan for every cohort – email templates, communication plan – automatic emails triggered by approvals, etc. (welcome, reminders) – send to students, employers, career services
- Customizable terminology (including the name) and look, including custom smartphone app

Faculty have a list of “**My Users**” – my students (in my school) or can search by student, with:

- Engagement score for each – what have done (resume, profile – visible to employers), name, email, student ID, major, notes on student record (college notes from office visits, track appointments, content); note types are customizable
- Reports based on note categories – how many students I talked with about xyz this semester

**My Team** concept – control what faculty & staff view for student records

- Add to my team & limit access – administrators Full, Base, Limited, Standard access
- View student record (360 view), first & last name, email, student ID – can add other fields, grad year, major, GPA, class level, campus, dept/school
- Events attended, Jobs Applied to, Interview attended, Appointments attended
- Profile with attributes, major, interests, LinkedIn connection, resume, favorite star for employer – all in profile
- Alumni Tracking – if alumni works for a particular employer, if the employer is an alumni

Faculty also have access to the PB Network User Social Forum, where users can post questions and topics that both other users in the network as well as career service administrators (professionals) can answer and share.

**Work-Based Learning** opportunities:

- Vetting WBL opportunities: System to review and approve opportunities
- Internships: Processing required paperwork: Submission of forms, approvals, tracking of hours, etc.

#### **4. Build Functionality Based on Needs: flexible, customizable**

##### **Technical Considerations:**

The Purple Briefcase network is fully hosted within the US on a private cloud solution that has been optimized to offer high availability, uptime, and the highest degree of security. The cloud-based, software-as-a-service platform provides customizable fields, form contents, and email messages

**Import** information – can integrate with SSO and/or data sync with student info system, set up schedule to send info to this system

**Reports** are all Excel reports so could put in other systems

No extra charge for set-up/training

##### **Updates Under Development:**

- New features to address current requirements in the field
- Respond to user feedback & experience for improvements

##### **Tech Support:**

- Complete support library included – how-to videos & articles
- Help desk ticket system – name, email & request – PB tracks tickets, live person, respond within 2 hours
- Training – send trainer for big groups (1–2 days) and/or web-based training

##### **Funding Structure:**

PB offers a few add-ons @ \$500 each

- Mentorship Module – My Mentors – contact creates an account (alumni, employer, etc.) so can volunteer to be a mentor for that school, list their job, industry, affiliations, spots available, opportunity description, duration, company, etc. (Email not provided to students, list connect limit & school manages submissions/approvals to contact mentor). On student side, looks like job search, list of opportunities, search for mentors that meet their needs based on various criteria such as their role, degree, location, or past major and send email.
- Graduation Survey (NACE aligned) – add on, school submits outcome survey (4 yr)

Also, employers may post jobs to individual schools for free (with an access code from the school), but pay a fee to post to multiple (consortium) schools all at once.

Cost basis – for consortium – would be based on each school’s enrollment (FTE), with a discount for a group purchase (total price around \$20,000 total for 9 schools). They are also currently offering add-ons at no cost to current customers and could likely do the same for the consortium if they all wanted certain add-ons.

##### **Vendor Impressions:**

Purple Briefcase was very responsive to our request for a demo and all questions. Overall, the dashboard and interface look very friendly with up-to-date usability. PB seems to have a really comprehensive set of features but may have many more features than some colleges want/need and/or is overwhelming.

# Symplicity

## Rubric Scores

- Background/ Overview: 8
- System Features: 49
- Accessibility & Usability: 23
- Technical Considerations: 15

### Overview:

Symplicity Career Services Manager (CSM) is a career services hub with key features around employment preparation, career support, and job placement tools. It claims to be a one-stop shop, supporting the student and institution at all levels. They integrate and partner with other student-facing tools (e.g., Portfolium, CareerSpots, Career Shift (career exploration tool), and Mentat. It has entry for students, employers, faculty, and alumni/graduates and the viewing and reporting is unique for each.

### 1. College Consortium/Networks:

Symplicity describes their regional installation as a “Hub” or “multi-instance” campus environment. The consortium example they discussed but didn’t show was Ivy Tech Community Colleges in Indiana (15 campuses). Extensive experience with colleges and community colleges.

### 2. Student Entry and Interface:

Specific functionality for students included:

- Resources: Career finder and career research tools including O\*NET profiler with 60 questions
- Career preparation tools including mock interviewing virtual tool with 1000+ bank of interview questions
- Networking with professional networks, employers, recruiters, LinkedIn
- Documents area to house resume versions and share with employers
- Job searching/recommended jobs based on behavior
- Resume builder that can integrate with Peoplesoft or other SIS
- Counseling and calendar for events and connection to career services
- Experiential Learning Module (for WBL experiences – can be configured for the SDIC language used)
- Credentials, activity, survey responses, are included in the list of other modules for the student
- Students OR faculty could initiate a WBL opportunity

### 3. Case Management Tools:

Their language for the case management tool is “Pathways” that tracks the student journey. All of student’s touchpoints or behavior in the tool is tracked and easily reported out. Specifically, students have a sequence of tasks or “to dos” and can see what that sequence/path looks like to anticipate what comes next. Admin, employer, etc. can see where student stands, if they are progressing or not, for example. All users can see any notes about the student added to their profile.

Student actions can be connected to a review and approval process. For example, a counselor can approve or schedule appointment and connect it to the “task” assigned to use Resume Builder for their resume.

Incorporates flags, upcoming tasks, and employer engagement as part of the Dashboard. Not sure how flags are generated.

#### **4. Build Functionality Based on Needs: flexible, customizable**

All language, dashboards, communication tools, reports, nav bar items can be customized. Will build out tools by request from colleges, but don’t have further info on that.

#### **Vendor Impressions:**

A strong and robust set of case management functionalities (more than others), and what seems like a longstanding history (over 1,300 institutions on board and 41+ million users including 1 million employers!). User experience looks nicer and more student friendly than some of the other tools. Focus on a lot of data synchronization, claiming to be able to easily connect/integrate with any other system at the college. I would say that this one was higher on the list of those I reviewed closely.

Cost seems to be based on student FTE, which is probably typical but something we would caution the region against, as far as I understand.

## CRM Systems

### B2B Engage

Total score: 22 points

#### **Background:**

- Company is BusinessU
- CCCCOC selected the tool as the CRM provider for the WEDD grant
- 90% of sectors and 4 consortia are using it. Not mandated by the CO.
- Regions: South Central, Central Valley, Inland Empire, Orange County (each using it differently)
- Types of users currently using B2B: 139 users in the system; DSNs and SNs primarily
- Costs would include licenses + any configuration needs

#### **Strengths:**

- Built with public agencies in mind; a lot has been customized for California/SWP needs
- Discussing an API process with Jobspeaker and Central Motherlode region
- If using the shared California system, would have access to information that has been authorized by other regions/users to share to see existing relationships, etc.
- A lot is configurable directly by users

#### **Potential Weaknesses:**

- If cost sharing with other California users on the same multi-tenant system, there would be limitations in ability to customize and some concern around shared access

#### **Cost and Implementation Notes:**

- Seat costs/software licenses: each user was billed at \$540 per year
- Cost model includes hosting, helpdesk support/training, and any customization requirements (e.g., APIs)
  - Specs needed for helpdesk and customizations before estimate can be generated
- BusinessU owns the system; user agreements around data sharing if on the shared California system
  - B2B system in California is one shared system in the state that uses differentiated access through user groups
  - B2B is the superuser so we'd have to contact them when we need to add users
  - Could set up multiple user groups for SDIC
- Could also set up a separate instance of the system that is ONLY our region. If we had our own instance, we could customize more on our own.

**Features Review:**

**Scoring Guide:**

0 = required feature not present

0.5 = required feature somewhat present but missing some functionality

1 = required feature fully present

1.5 = required feature has enhanced elements

**Employer/Contact Information Management**

ID	Requirement	Notes	Score
A1	Ability to create employer profiles with standard RFI details like: <ul style="list-style-type: none"> <li>• Address</li> <li>• Sector(s)</li> <li>• Website</li> <li>• Phone</li> <li>• # of employees</li> </ul>	Can create different instances of the employer if you don't want to use a public one elsewhere in the state	<b>1</b>
A2	Employer profiles have a place to collect/view related sector(s)	Sectors are multi-select on employer profile	<b>1</b>
A3	Employer profiles have a place to collect/view which colleges have relationship with employer	<ul style="list-style-type: none"> <li>• Assigned owners have college affiliations but no specific location for noting college(s) with relationship</li> <li>• Stakeholder Engagement is similar but for non-employer contacts (SWP support, curriculum development, etc. for deans and others)</li> <li>• Account lookup: Search to see who has a relationship with someone. Shows who owns the record (and where they are from, role), click on the contact to see contact details.</li> </ul>	<b>0.5</b>
A4	Employer profiles have a place to collect/view types of engagement offered	<ul style="list-style-type: none"> <li>• Engagement types collected in Business and Industry Engagement: advisory committee, curriculum development, etc. (can select more than one)</li> <li>• WBL is a separate list of options; plus can note when part of CareerXP</li> <li>• Business Services is a separate field for reporting</li> <li>• Promoter: level of support; logo on CCC website, etc.</li> </ul>	<b>1</b>

ID	Requirement	Notes	Score
A5	Employer profiles have a place to collect/view the owner and rules of engagement for that employer		1
A6	Matching on a unique ID to prevent duplicates being created		1
A7	Lead Management – Ability to input and track employees/ contacts associated with organizations (with their contact info)	<ul style="list-style-type: none"> <li>Contact has a Company selection that includes Account Type: employers, colleges, etc. Can be commerce or economic development org, etc.</li> <li>Assign a contact to one or more individuals</li> </ul>	1
A8	Ability to note particular sector(s) that a contact represents (when an employer has multiple)	Could be added	0
A9	Open fields for notes on employer and contact records		1

#### Differentiated Access

ID	Requirement	Notes	Score
B1	Dashboards		1
B2	Limit access to employer/contact records until the record owner is ready to share	Organizations: Or shared system, can collaborate with other users in different sectors (e.g., Advanced Manufacturing) and see who is where (Community College Directory) or limit access through groups. Contacts can be shared or not. Can set to default to always be Only User Group.	1

#### Process Management

ID	Requirement	Notes	Score
C1	Tasks/Follow-Up	<ul style="list-style-type: none"> <li>Tasks with reminders, add to calendar, etc.</li> <li>Process flows (e.g., Curriculum Review); stages and roles and apply to different modules (accounts, contacts)</li> </ul>	1

		<ul style="list-style-type: none"> <li>• Customize steps and other work; multiple processes for different modules</li> <li>• Actions Bank for developing workflows</li> </ul>	
C2	Email Tracking		<b>1</b>
C3	Meeting/Appointment Tracking		<b>1</b>
C4	Call Tracking		<b>1</b>
C5	Activity Tracking (WBL, etc.)		<b>1</b>
C6	Ability to move employers through a sales process	Robust process design tools that can be applied throughout (not just employers)	<b>1.5</b>

### Notifications/Messaging

ID	Requirement	Notes	Score
D1	Campaign Management/ functions like Constant Contact	<ul style="list-style-type: none"> <li>• Contact Type: can tie to campaigns and reports (e.g., Deans, Employers)</li> <li>• Email template for campaigns. Save templates if you have repeated sends; formatted, attachments.</li> <li>• Track campaigns. Can also use workflows and automation based on someone's engagement with the campaign.</li> </ul>	<b>1</b>
D2	Send Alerts	Activity feed; social feed; public or private or to one person	<b>1</b>
D3	MS Outlook Integration		<b>1</b>
D4	Shared Calendar	There's an internal calendar and you can integrate with Outlook and Gmail	<b>1</b>

### Other

ID	Requirement	Notes	Score
E1	Reports	<ul style="list-style-type: none"> <li>• Tag cloud for accounts, contacts, etc. Can see list of records with that contact. Would help with reports, campaigns.</li> <li>• Reports would show which colleges are engaged with an employer</li> <li>• New activity reports aligned with state DSN reports</li> </ul>	<b>1</b>

ID	Requirement	Notes	Score
E2	Mobile App		0.5
E3	Data Share (both directions) with current system(s)	Possible but depends on requirements; unclear how much experience they have with setting these up. Their next step is working with Jobspeaker on setting up an API for one of the Central Motherlode colleges that uses both tools.	0.5

## HubSpot

Total score: 25.5 points

### Background:

- Free version explored by some DSNs this year
- Demo included all paid features

### Strengths:

- Highly configurable/self-service
- User friendly and modern
- Strong reporting tools
- Good documentation on API capacity
- Transparency on costs and support included

### Potential Weaknesses:

- Sales/marketing focus with less experience in education (but has developed an education division to meet needs); majority of current education clients appear to be 4-year private schools

### Cost and Implementation Notes:

- Implementation and client support is all included in their pricing structure
- 25 teams for professional level
- Pricing is based on individual users
- Includes up to 500k API calls per day

First Year: 12-month term billed in advance

- Sales Hub Enterprise (10 Users Included): \$10,800.00 / 12 mo
- Sales Hub Enterprise Additional User (20 Users): \$21,600.00 / 12 mo
- Sales Hub Enterprise Onboarding (one-time fee): \$3,000.00

Total first year: **\$35,400.00**

*Note: Does not include consulting and developer support for Jobspeaker API. Requirements would need to be developed to cost that out.*

Subsequent year(s):

- Sales Hub Enterprise (10 Users Included): \$11,520.00 / 12 mo
- Sales Hub Enterprise Additional User (20 Users): \$23,040.00 / 12 mo

**Annual recurring fees: \$34,560.00 / 12 months**

**Features Review:**

**Scoring Guide:**

0 = required feature not present

0.5 = required feature somewhat present but missing some functionality

1 = required feature fully present

1.5 = required feature has enhanced elements

**Employer/Contact Information Management**

<b>ID</b>	<b>Requirement</b>	<b>Notes</b>	<b>Score</b>
A1	Ability to create employer profiles with standard RFI details like: <ul style="list-style-type: none"> <li>• Address</li> <li>• Sector(s)</li> <li>• Website</li> <li>• Phone</li> <li>• # of employees</li> </ul>	Profiles are fully customizable and would address A1, A2, A3, A4, and A5 plus any specific requirements for the region	<b>1.5</b>
A2	Employer profiles have a place to collect/view related sector(s)		<b>1</b>
A3	Employer profiles have a place to collect/view which colleges have relationship with employer		<b>1</b>
A4	Employer profiles have a place to collect/view types of engagement offered	Search/filter by activity type	<b>1</b>
A5	Employer profiles have a place to collect/view the owner and rules of engagement for that employer		<b>1</b>
A6	Matching on a unique ID to prevent duplicates being created	Duplication handled in a number of ways	<b>1</b>
A7	Lead Management – Ability to input and track employees/ contacts associated with organizations (with their contact info)		<b>1</b>
A8	Ability to note particular sector(s) that a contact represents (when an employer has multiple)		<b>1</b>
A9	Open fields for notes on employer and contact records		<b>1</b>

### Differentiated Access

ID	Requirement	Notes	Score
B1	Dashboards	Some dashboard templates plus create custom	1.5
B2	Limit access to employer/contact records until the record owner is ready to share	Can create sub-teams to limited visibility	1

### Process Management

ID	Requirement	Notes	Score
C1	Tasks/Follow-Up	<ul style="list-style-type: none"> <li>Can create a task queue: Quickly page from one to the other</li> <li>Playbooks in the system tell you some tips/steps when engaging; some can be designed to collect the responses within fields/notes</li> </ul>	1
C2	Email Tracking	Through Outlook and Gmail plug-ins	1
C3	Meeting/Appointment Tracking		1
C4	Call Tracking	<ul style="list-style-type: none"> <li>Can make and record phone calls from within the system</li> <li>100 live chat boxes with Professional account</li> </ul>	1
C5	Activity Tracking (WBL, etc.)		1
C6	Ability to move employers through a sales process	<ul style="list-style-type: none"> <li>Workflows: Design custom processes tied to tasks or campaigns, etc.</li> <li>Workflow extensions: Design what happens after determined statuses (emails, notifications): templates available but you can drag and drop to create your own</li> <li>Can have required fields before moving something to a new stage in the pipeline</li> </ul>	1

### Notifications/Messaging

ID	Requirement	Notes	Score
D1	Campaign Management/ functions like Constant Contact	<ul style="list-style-type: none"> <li>• 100+ pre-build reports in the system</li> <li>• All emails are responsive and you can test what they will look like (like Mailchimp)</li> </ul>	<b>1.5</b>
D2	Send Alerts		<b>1</b>
D3	MS Outlook Integration	<ul style="list-style-type: none"> <li>• Can email directly from system or use Gmail or Outlook plug-ins; can log any emails and track via the plug-in within Gmail or Outlook</li> <li>• Email scheduling</li> </ul>	<b>1</b>
D4	Shared Calendar	Plus integration with Outlook and Google	<b>1</b>

### Other

ID	Requirement	Notes	Score
E1	Reports	<ul style="list-style-type: none"> <li>• Create custom reports on single data sets, multi data sets, attributing reporting</li> <li>• Deal pipelines to help forecast and report</li> <li>• Pipelines are customizable</li> <li>• Analytics also provided: on email templates, etc.</li> </ul>	<b>1</b>
E2	Mobile App		<b>1</b>
E3	Data Share (both directions) with current system(s)	A lot of documentation of their API capacities	<b>1</b>

## Launchpad

Total score: 22.5

### Background:

- Working in 12 states
- 100 organizations including workforce development, regional consortia, etc.
- LA County using Launchpad to connect 19 community colleges with workforce development and others engaged with students and employers. Focus on their 6 high-priority sectors. Started small and grew to encompass additional entities.
- Part of a broader offering of tools that includes potential student and alumni CRM, case management tools for current students, and career services tools
- Provided demo for SDCCD that included the job seeker portal of the San Diego Workforce Partnership website
- SDCCD trying to come to a consensus this year; would like to make a decision by the end of 2019. If Deans agree at the end of 2019, it will go to Chancellor's Cabinet in Spring of 2020; piloting, and then optimistically would go live in fall 2021.

### Strengths:

- Integration potential (SDWP and others)
- Existing education clients have introduced customizations that make more sense to colleges
- Could be built to iteratively address other needs (e.g., student CRM)
- Good reporting tools

### Potential Weaknesses:

- Not a lot of self-service in terms of configurations
- CRM terms can be confusing and not often adjustable
- Potential for additional costs when system isn't configurable by users

### Cost and Implementation Notes:

- Jobspeaker going through the partner review process for Salesforce so there might be easier integration opportunities
- 8 Launchpad Workforce Cloud w/ Embedded Salesforce Licenses: \$8,000/year
- 1 Partner Community License (20-user bundle): \$3,200/year
- One-time Business Services CRM and Partner Community Implementation (Estimate Only Full SOW provide after discovery): \$200/hour (Launchpad estimate = \$20,800)
- Total start-up and first year costs: \$32,000

### Features Review:

### Scoring Guide:

0 = required feature not present

0.5 = required feature somewhat present but missing some functionality

1 = required feature fully present

1.5 = required feature has enhanced elements

### Employer/Contact Information Management

ID	Requirement	Notes	Score
A1	Ability to create employer profiles with standard RFI details like: <ul style="list-style-type: none"><li>• Address</li><li>• Sector(s)</li><li>• Website</li><li>• Phone</li><li>• # of employees</li></ul>	<ul style="list-style-type: none"><li>• Some details can be configured as part of setup</li><li>• Business Assessment survey can be designed and administered to collect information from employers (e.g., Are you currently hiring?)</li><li>• Hierarchy levels for different offices of the same organization</li></ul>	<b>1</b>
A2	Employer profiles have a place to collect/view related sector(s)	Field is currently single-selected but could be modified to multi-select	<b>0.5</b>
A3	Employer profiles have a place to collect/view which colleges have relationship with employer	Review notes: Not a separate field but would rather be viewing the profiles of account owners	<b>0.5</b>
A4	Employer profiles have a place to collect/view types of engagement offered		<b>1</b>
A5	Employer profiles have a place to collect/view the owner and rules of engagement for that employer	WBL can have different categories or services can be used for this	<b>1</b>
A6	Matching on a unique ID to prevent duplicates being created		<b>1</b>
A7	Lead Management – Ability to input and track employees/ contacts associated with organizations (with their contact info)	Contact types are configurable (jobseekers, alumni, and others included in addition to employers)	<b>1</b>
A8	Ability to note particular sector(s) that a contact represents (when an employer has multiple)	Review notes: Not present but easy to add	<b>0</b>
A9	Open fields for notes on employer and contact records		<b>1</b>

### Differentiated Access

ID	Requirement	Notes	Score
B1	Dashboards	<ul style="list-style-type: none"> <li>Can be role-based or user can define reports/views to appear</li> <li>SWP Metrics Dashboard exists</li> </ul>	1.5
B2	Limit access to employer/contact records until the record owner is ready to share	<ul style="list-style-type: none"> <li>Account owner has read/write access and others can be set to read-only</li> <li>Can set some accounts to approval needed before access given</li> <li>Can create groups for colleges, sectors, employers</li> <li>Employers can also have limited access to the system</li> </ul>	1

### Process Management

ID	Requirement	Notes	Score
C1	Tasks/Follow-Up	Tasks have due dates, etc.	1
C2	Email Tracking		1
C3	Meeting/Appointment Tracking	Events are scheduled meetings Attendance at events are tracked	1
C4	Call Tracking		1
C5	Activity Tracking (WBL, etc.)		1
C6	Ability to move employers through a sales process		1

### Notifications/Messaging

ID	Requirement	Notes	Score
D1	Campaign Management/ functions like Constant Contact		1
D2	Send Alerts	Chatter area for internal/external social feed	1
D3	MS Outlook Integration	And Gmail	1
D4	Shared Calendar	Outlook and Google supported	1

### Other

ID	Requirement	Notes	Score
E1	Reports	Have developed most SWP reports for LA County	1.5

ID	Requirement	Notes	Score
E2	Mobile App		<b>1</b>
E3	Data Share (both directions) with current system(s)	Exports and imports supported now; APIs are possible but the details would need to get worked out with the other system so it's a TBD	<b>0.5</b>

## APPENDIX E: Career Engagement Tools – Requirements and Evaluation Rubric

Last updated: 09/06/19

### A. Background/Overview

Detail the tool’s history, reliability, and reputation, as well as the availability of independent reviews and user community activity.

#### Considerations:

- How long has the tool been available?
- Is the tool produced by a known and reputable institution or company? Is the company stable?
- Has the software evolved over time? What evidence exists to indicate that the tool might keep pace with future advancements?
- What educational institutions currently use the software? Are software reviews available from these institutions?
- Have institutions experienced significant technical issues?
- Are independent reviews of the software available? If so, how is the software rated relative to other options?
- What kind of user and technical support is available? What proof is available from other institutions about the quality of the support that is provided? Is the company that produced the software committed to friendly, quick, helpful, and accurate support?
- Does the tool have an active user community?

ID	Requirements	Must-Have	Nice-to-Have	Notes
A1	Required features are fully implemented	x		
A2	While the tool is fully operational and acceptable in its current state, updates are under development that would enhance the product		x	
A3	The company is reputable, with strong client references or related kudos	x		
A4	The company understands the community college context and nuances of the related needs	x		

ID	Requirements	Must-Have	Nice-to-Have	Notes
A5	The company is consistently adapting the product with new features to address current requirements in the field based on a defined change management process	x		
A6	The company has a defined change order process for an individual college's specific needs	x		
A7	The company is consistently adapting the product to respond to user feedback and user experience improvements	x		
A8	Current clients rate the company favorably for client support	x		

**B. System Features**

Detail the tool's features and how they address the project's use cases and requirements.

Considerations:

- Is the tool available to the appropriate audience(s)?
- Does the tool address at least one key activity/requirement of the system, as determined by stakeholder feedback? (Preference for systems that address multiple requirements.)
- Can specific privileges be assigned to various roles or does the system specify the privileges assigned to each role?
- Can tool data be viewed from a variety of perspectives?
- What security features does the tool offer? For example, does it require the use of encrypted passwords?
- Can student information be imported in bulk/batch (e.g., the names of all students and program affiliations)? If so, what form must it be in (e.g., an Excel spreadsheet)?
- Can data/files be imported and/or exported to existing or future administrative systems?
- Can the activities of all users be tracked (e.g., by their log-in time, log-out time)?

ID	Requirement	Must-Have	Nice-to-Have	Notes
B1	The audience responsible for completing a related activity has access to the tool. Includes students, college staff, faculty, and employers.	X		
B2	When appropriate, multiple audiences are served (e.g., a student builds his	x		

ID	Requirement	Must-Have	Nice-to-Have	Notes
	resume and a career center counselor has access to it to provide feedback)			
B3	The system allows for different privileges based on user role, when appropriate	x		
B4	The system displays different information for different audiences (May not always be applicable)		x	
B5	The system has the capacity to be used as a regional installation, if appropriate	x		
B6	The system complies with all campus security requirements (e.g., FERPA)	x		
B7	The system allows for APIs with required systems (not always required)		x	
B8	The system allows for information to be imported, when APIs not possible (e.g., SIS data, course data)	x		
B9	Automatic activity tracking features are available, when necessary (e.g., time stamps)	x		
<b>Feature: Career research</b>				
B10	Ability to connect to/integrate with career exploration tools (e.g., career profiles, assessments)	x		
<b>Feature: Work-Based Learning and Employment Preparation</b>				
B11	Resume development: Resume builder	x		
B12	Resume development: Online portfolio	x		
B13	Matching skills to resume from verified source (e.g., LMS or faculty entry)		x	
B14	Support in resume development: Tools for college to view students' resumes and provide feedback	x		
B15	Interview training: Online tutorials and other resources		x	

ID	Requirement	Must-Have	Nice-to-Have	Notes
B16	Interview training: Online mock interviews		x	
B17	Tracking completion of activities: Place for college to view students' activities	x		
B18	Ability for college to message student about preparation activities	x		
<b>Feature: Work-Based Learning Process Management</b>				
B19	Tools for college to add employers and WBL opportunities to the system	x		
B20	Ability for colleges to share employers and opportunities across all 10 colleges	x		
B21	Ability to categorize WBL type for posted opportunities (e.g., internships, job shadows) and by sector/pathway	x		
B22	Vetting WBL opportunities: System to review and approve opportunities posted by employers	x		
B23	Providing students with information about WBL opportunities: Searchable board of opportunities	x		
B24	Providing faculty with information about WBL opportunities: Searchable board of opportunities	x		
B25	Notifications to students with information about WBL opportunities: Emails/texts about matching opportunities	x		
B26	Notifications to faculty with information about WBL opportunities: Emails/texts about matching opportunities	x		
B27	Tools to record intake of student, including assessments, background, and preferences	x		
B28	Tracking student participation: Place to record and view student activities	x		

ID	Requirement	Must-Have	Nice-to-Have	Notes
	from placement to post-placement for case management tracking			
B29	Tools to collect student, employer, and faculty feedback	x		
B30	Ability to document referrals to other services (e.g., career center or counseling)	x		e.g., SARS counseling system; how does the tool transition student experiences between systems
B31	Communication tools that allow WBLC, faculty, and student to connect around WBL activities	x		
B32	Process management tools (e.g., approvals, tracking hours)	x		Ability to track completion of required documentation, forms, signatures, etc. (electronic forms, view stage in the process, view completed forms and forms remaining to be completed), export forms, evidence of completion, etc.
B33	Process management tools can accommodate some level of variation college by college	x		
B34	Ability for colleges to have proprietary relationships with colleges for internship postings	x		
B35	Ability for employers to share internship opportunities across colleges	x		
B36	Title 5 reporting requirements		x	Needs clarification, what are the details of this requirement?
B37	Assessments	x		Ability to solicit feedback from employers/faculty/students
<b>Feature: Job Placement Process Management</b>				
B38	Tools to record intake of student, including assessments, background, and preferences	x		
B39	Ability to document referrals to other services (e.g., career center or counseling)	x		

ID	Requirement	Must-Have	Nice-to-Have	Notes
B40	Look for jobs: Student can view job postings	x		
B41	Look for jobs: Save favorite jobs	x		
B42	Look for jobs: Notifications about matching jobs		x	
B43	Look for jobs: Automatically send stored resume	x		
B44	Look for jobs: Apply for jobs	x		
B45	Place for student to track their activities (e.g., jobs applied to)	x		
B46	Ability for employers to search for candidates and message when appropriate	x		
B47	Tools for college to add employers and WBL opportunities to the system	x		
B48	Ability for colleges to share employers and opportunities across all 10 colleges	x		
B49	Ability for colleges to have proprietary relationships with employers for job postings	x		
B50	Tracking completion of activities: Place for college to view students' activities	x		
B51	Communication tools that allow college and student to connect around job placement activities	x		
B52	Ability to build and administer surveys to alumni about employment outcomes	x		
B53	Ability to build and administer surveys to confirm employment with alumni employers	x		
B54	Email reminders to employers to encourage them to close positions after they have been filled	x		
B55	Assessments	x		Ability to solicit feedback from employers on new hire's skills and job placement process

### C. Accessibility and Usability Features

Detail the tool’s user friendliness and accessibility.

Considerations:

- Is the tool user-friendly?
- Does the tool align with student and staff technology literacy skills?
- Does the tool comply with current educational policies and laws, such as the Americans with Disabilities Act?

ID	Requirement	Must-Have	Nice-to-Have	Notes
C1	The tool aligns with student and staff technology literacy skills	x		
C2	The tool complies with best practices in user design	x		
C3	The tool provides a modern, responsive design	x		Responsive: the tool scales to display correctly on both computers and mobile devices
C4	The tool includes a mobile app version		x	A separate app that allows for push notifications, etc.
C5	The tool meets all applicable ADA requirements	x		

### D. Technical Considerations: Detail the software, hardware, and network requirements.

Considerations:

- Does the tool integrate with existing systems?
- Can information from the tool be transferred to existing institutional software?
- Can information from existing tools be transferred to the tool?
- Can the tool be customized?
- Can the tool be branded with the institution’s name and logo? If so, is there an additional cost?
- Can you change the arrangement and format of items presented to tool users?
- What procedures must be followed to customize the software?
- What type of support is available — email, chat, telephone, and/or on-site?
- What consulting services are available? Are consulting services available to assist with implementation planning and execution?
- What training will the software vendor or distributor provide?
- What are the future development plans? When is the next version of the software expected?
- Is this platform scalable? Can it be expanded easily to accommodate a larger number of students and instructors?

ID	Requirement	Must-Have	Nice-to-Have	Notes
D1	Information from the tool can be transferred to existing institutional software (e.g., via APIs or data exports, outcomes survey data)	x		
D2	Information from existing tools can be transferred to the tool (e.g., via APIs or data exports, LMS data used for student profiles)	x		
D3	The tool can be customized for the college/region with branding	x		
D4	Content such as field labels, form contents, email messages and other elements are customizable by the college	x		
D5	The vendor provides technical support during regular business hours	x		
D6	The vendor provides technical support during extended hours		x	
D7	Consulting services are available to assist with planning and technical needs	x		
D8	The vendor provides adequate training to key staff	x		
D9	The tool is scalable	x		

## Career Engagement Tools – Weighted Scoring

Please provide input into the weighted scoring process by identifying the relative importance of requirements and features.

1. For each of the categories below, specify the relative importance of the category based on a 100-point scale. For example, if you rate all four of the categories as equally important you would assign 25 points for each.

Requirements Category	Point Values assigned (2 responses)
Tool Background/Overview (Items A1–A8)	
Tool System Features (Items B1–B52)	
Tool Accessibility and Usability (Items C1–C5)	
Tool Technical Considerations (Items D1–D9)	
Total	100

2. For each of the feature categories below, specify the relative importance of each category based on a 100-point scale. For example, if you rate all four of the feature categories as equally important you would assign 25 points for each.

Feature Category	Point Values assigned (2 responses)
Career Research (Item B10)	
WBL and Employment Preparation (Items B11–B18)	
Work-Based Learning Process Management (Items B19–B36)	
Job Placement Process Management (Items B37–B55)	
Total	100

## APPENDIX F: Recommended Jobspeaker System Improvements and Product Enhancements

The following is a compilation of recommendations for system improvements to Jobspeaker generated by pilot participants. The vendor reviewed the list and categorized according to type and next step. Note that it will be important to establish criteria for determining priorities (e.g., nice-to-have versus must have).

### Type:

- Available (done)
- In Progress
- RoadmapNew: Recommendation added to Jobspeaker product roadmap
- SanDiegoOnly: Recommendation unique to the San Diego context (e.g., API with HubSpot)
- SanDiegoNew: Recommendation identified by San Diego but may benefit other clients

### Next steps:

- Design: Requires a design discussion before requirements can be defined
- Requirements Gathering: Design understood but specific requirements and use cases need to be defined before development can begin
- Content: Content needs to be developed for this feature
- Development: Development is underway
- Testing: Development is almost complete
- Training: Training is required
- Configuration: Need configuration requirements before implementation is possible

Timeline estimates for items not already available or in progress assume a January 2020 start time. Timeline will need to be adjusted to accommodate changes in regional timelines, once determined.

#	Type	Feature Area	Description	Timeline	Next Step
1	Available	Employers and Opportunities	Add to employer registration a question about the types of engagements interested in	Q4/19	Training
2	Available	Student Registration and Profiles	Evaluate the current registration questions to see if they are appropriate for our students. (TBD but would need to know if possible to customize registration for the region if desired.) Example: the first question is Desired Job, which might be intimidating for new students.	Q4/19	Configuration Requirements
3	Available	Student Registration and Profiles	Allow students to select from multiple colleges' programs to build their School(s) and Programs and Skills.	Q4/19	Training
4	In Progress	Job Board	Should be a way to research employers/companies (employer profiles or links to their websites) when they are posted on Jobspeaker.	Q4/19– Q1/20	Testing
5	In Progress	Student Registration and Profiles	Make it clear on the Skills and Competencies page that these are the skills that will be achieved when the program is completed. Or allow students to manage these here vs. on the profiles (remove the skills they haven't acquired and put them back in the "bank" until the course is completed).	Q4/19	Development
6	In Progress	Student Registration and Profiles	Allow alumni to select their program of study and use that data feature, too.	Q4/19	Requirements Gathering
7	In Progress	Student Registration and Profiles	Lower priority but would be nice: Enhance the alumni experience for those who are not here as Jobseekers but rather want to focus on the networking and engagement side of alumni engagement.	Q4/19	Testing (Mentoring)

#	Type	Feature Area	Description	Timeline	Next Step
8	In Progress	System Speed	Certain pages (e.g., job board and edit profile) and features are slow to load (ruling out internet connectivity issues). This presents an issue for features like type/suggest as the user can be quicker than the suggestions load and they don't use the feature correctly.	Q4/19	Testing
9	In Progress	User Experience	Need more user support materials in the form of videos, user guides, tool tips, etc. Telling students the purpose behind the process would be very helpful.	Q4/19– Q1/20	Content Development
10	RoadmapNew	Events	Ability to copy an event for recurring types would be very helpful (CCN does this).	Q1/20	Requirements Gathering
11	RoadmapNew	Events	Add a search to My Events	Q1/20	Requirements Gathering
12	RoadmapNew	Events	Add audience types for events so list is specific to user role (public [all users], staff + students only, employers + students, employers only).	Q1/20– Q2/20	Requirements Gathering
13	RoadmapNew	Job Board	Location search was often confusing. Maybe the company's headquarters are shown rather than the job location?	Q2/20	Requirements Gathering
14	RoadmapNew	Student Registration and Profiles	Differentiate between the skills the student has achieved vs. those they will achieve upon completion of their selected program. Auto-loading the entire set of courses and skills is confusing, especially for new students.	Q1/20	Design
15	RoadmapNew	Student Registration and Profiles	Recommend that the student starts their profile development by selecting the courses they have completed from a list of courses in their program + other programs.	Q1/20– Q2/20	Design

#	Type	Feature Area	Description	Timeline	Next Step
16	RoadmapNew	Student Registration and Profiles	In absence of college verification step (which could take some colleges a long time to work out with IT), allow students to say a course is completed (as a way to limit skills listed to current education attainment) and have a different layer for courses completed that are “college verified” when the college is ready to set up an API/data feed from the SIS.	Q1/20– Q2/20	Design
17	RoadmapNew	Student Registration and Profiles	The student can decide if they want to add courses in progress but the skills should display differently (a different color, etc.).	Q1/20– Q2/20	Design
18	RoadmapNew	Student Registration and Profiles	Skills associated with other/future courses are available for reference but not part of the student’s profile until the courses are added.	Q1/20– Q2/20	Design
19	RoadmapNew	Student Registration and Profiles	Make the profile creation/update process more guided, step-by-step so students are thoughtfully building their profiles to generate more complete resumes. Explain the purpose of multiple profiles.	Q1/20– Q2/20	Design
20	RoadmapNew	User Experience	Better overall navigation. Recommend working with a UX designer to assess the functions of the site and map out a more user-friendly organization of tools.	Q1/20	Design
21	RoadmapNew	User Experience	Unclear that you need to select your name to view other areas since the Job Board is the only persistent nav element.	Q1/20	Design
22	RoadmapNew	User Experience	Make navigation task-based with simplified language.	Q1/20	Design
23	RoadmapNew	User Experience	Group navigation options in a more logical way (School and Programs and Skills closer to Profiles, etc.).	Q1/20	Design

#	Type	Feature Area	Description	Timeline	Next Step
24	RoadmapNew	User Experience	Explore developing an onboarding type of experience so students work in the order that makes data relationships clear (e.g., start by adding/updating your Schools and Programs, then go to Skills to manage that, then go to Profiles to build and refine based on what you did in the first two locations, etc.).	Q1/20	Design
25	RoadmapNew	User Experience	Some terminology is confusing to students (e.g., universal recommendation to rename “uExplore” to something like “Explore Careers”; unclear that “School and Programs” is where you add your coursework; “Program” is sometimes less familiar than “Major”).	Q1/20	Design
26	RoadmapNew	WBL	Student looking for WBL opportunities posted on job board.	Q1/20	Design and Requirements Gathering
27	RoadmapNew	WBL	Student fulfilling WBL reporting requirements for a course-based WBL activity.	Q1/20	Design and Requirements Gathering
28	RoadmapNew	WBL	Student self-reporting their WBL activity (need more detail around required data and why a student would be reporting this beyond part of the work experience section on the profile/resume). The “workaround” to do this via Events for Mesa was not intuitive but also probably a stopgap solution for the pilot.	Q1/20	Design and Requirements Gathering

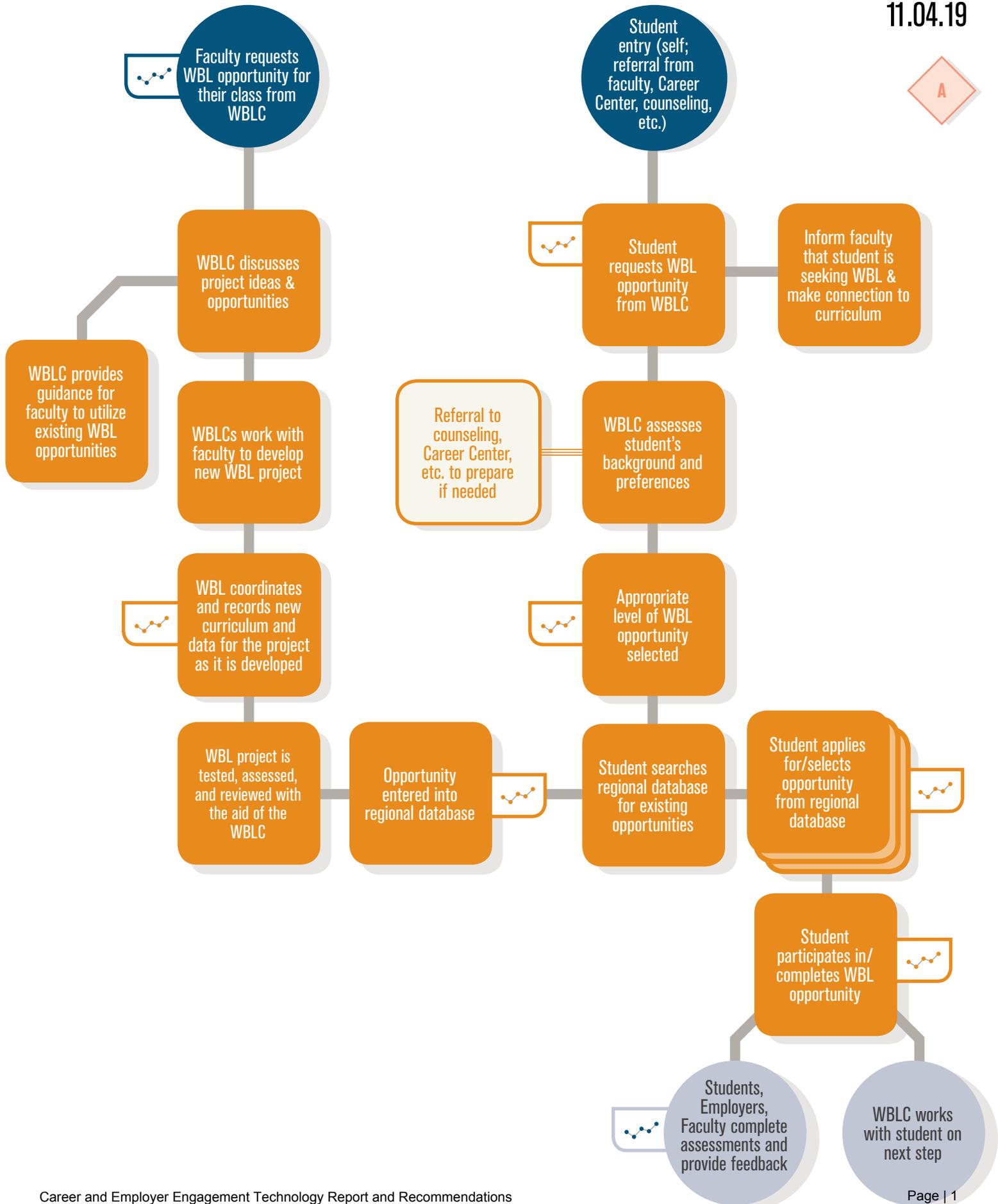
#	Type	Feature Area	Description	Timeline	Next Step
29	RoadmapNew	WBL	Clearer organization of the multiple tools/use cases related to work-based learning. Currently only course-based WBL resides in the Work-Based Learning section. Students go to the job board to locate other opportunities like job shadows, etc., and this is confusing. Need to define this with all colleges (currently all feedback coming from Mesa) but consensus that there needs to be more cohesiveness around potential use cases so the navigation and workflows make sense.	Q1/20	Design and Requirements Gathering
30	SanDiegoNew	Case Management	Ideally the ability to add a referral to an office/person that triggers a notification. For example, the job placement case manager may add a note that the student has an interview coming up and is being referred to the campus clothing closet for an interview outfit; that might trigger an email to whoever manages that effort to let them know a student will be coming in and needs help.	Q3/20	Design and Requirements Gathering
31	SanDiegoNew	Case Management	More fields/structure to collect interactions and the outcomes. Needs to be more robust than a list of Notes so that we can report on different types of engagement.	Q1/20– Q2/20	Requirements Gathering
32	SanDiegoNew	Case Management	Example: type of interaction in a menu (initial assessment, resume support, student email received, etc.), the notes, and then a next step (which might be a referral, that is also a drop-down menu).	Q1/20– Q2/20	Requirements Gathering
33	SanDiegoNew	Case Management	A way to track a student’s job readiness status. Could be a simple checklist of steps/stages that get checked off as student is assessed (e.g., resume reviewed) or something more elaborate that mirrors the student’s job progress tracker as a quick visual to staff where the student is in the process.	Q1/20– Q2/20	Requirements Gathering

#	Type	Feature Area	Description	Timeline	Next Step
34	SanDiegoNew	Employers and Opportunities	Configuration of the “regional hub” for employers to manage opportunities that are available to all students and to view all regional candidates.	Q1/20– Q2/20	Design and Requirements Gathering
35	SanDiegoNew	Employers and Opportunities	Assumed that employers will access the regional hub to post opportunities in and those opportunities are shared across all 10 college installations for students to access.	Q1/20– Q2/20	Design and Requirements Gathering
36	SanDiegoNew	Employers and Opportunities	Assumed that employers use the regional hub to review student candidates across all 10 colleges.	Q1/20– Q2/20	Design and Requirements Gathering
37	SanDiegoNew	Employers and Opportunities	Assumed that some small number of users at each college also has access to view student candidates across all 10 colleges to support employers when a need can’t be met by their college.	Q1/20– Q2/20	Design and Requirements Gathering
38	SanDiegoNew	Employers and Opportunities	Assumed colleges may still have proprietary relationships in their own installations and these are not part of HubSpot or the regional hub.	Q1/20– Q2/20	Design and Requirements Gathering
39	SanDiegoNew	Events	Add ability to share events across the region.	Q2/20	Requirements Gathering
40	SanDiegoNew	Student Registration and Profiles	In the automated resume, don’t include empty sections (e.g., Portfolio/Projects).	Q1/20– Q2/20	Design
41	SanDiegoOnly	Employers and Opportunities	Assumed that all employer data from HubSpot is shared with the regional hub.	Q1/20– Q2/20	Design and Requirements Gathering
42	SanDiegoOnly	Employers and Opportunities	We need to evaluate what fields we send from HubSpot and if they have a current home in Jobspeaker.	Q1/20– Q2/20	Design and Requirements Gathering

#	Type	Feature Area	Description	Timeline	Next Step
43	SanDiegoOnly	Employers and Opportunities	Also what (or if) we send data back from Jobspeaker to HubSpot.	Q1/20– Q2/20	Design and Requirements Gathering
44	SanDiegoOnly	Job Board	Additional filters on the job board since that data is available (Education Level, Experience Level, Posted Date Range).	Q1/20	Requirements Gathering

# WBL Process Map

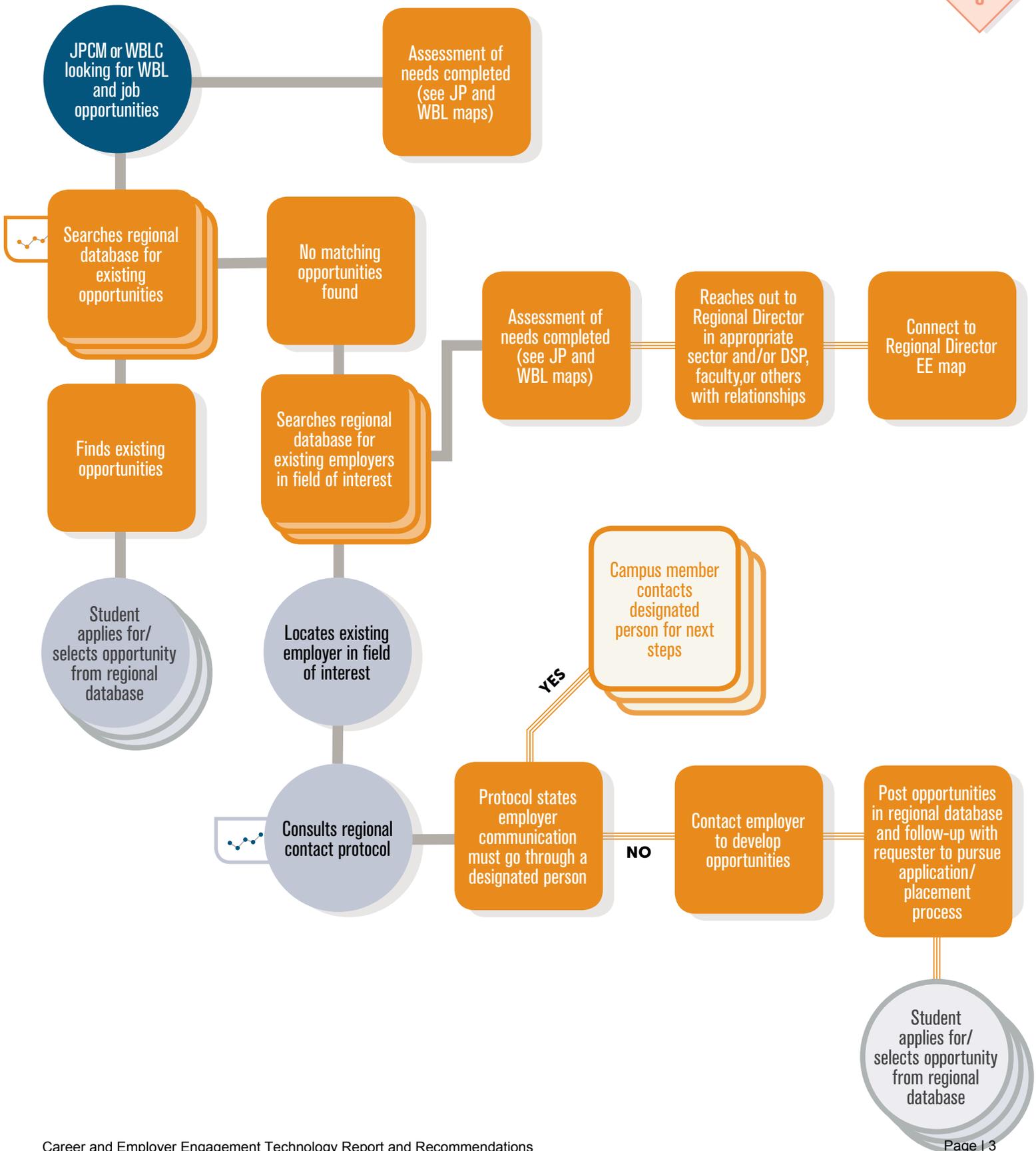
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# JPCM or WBLC Outreach to Employers

11.04.19

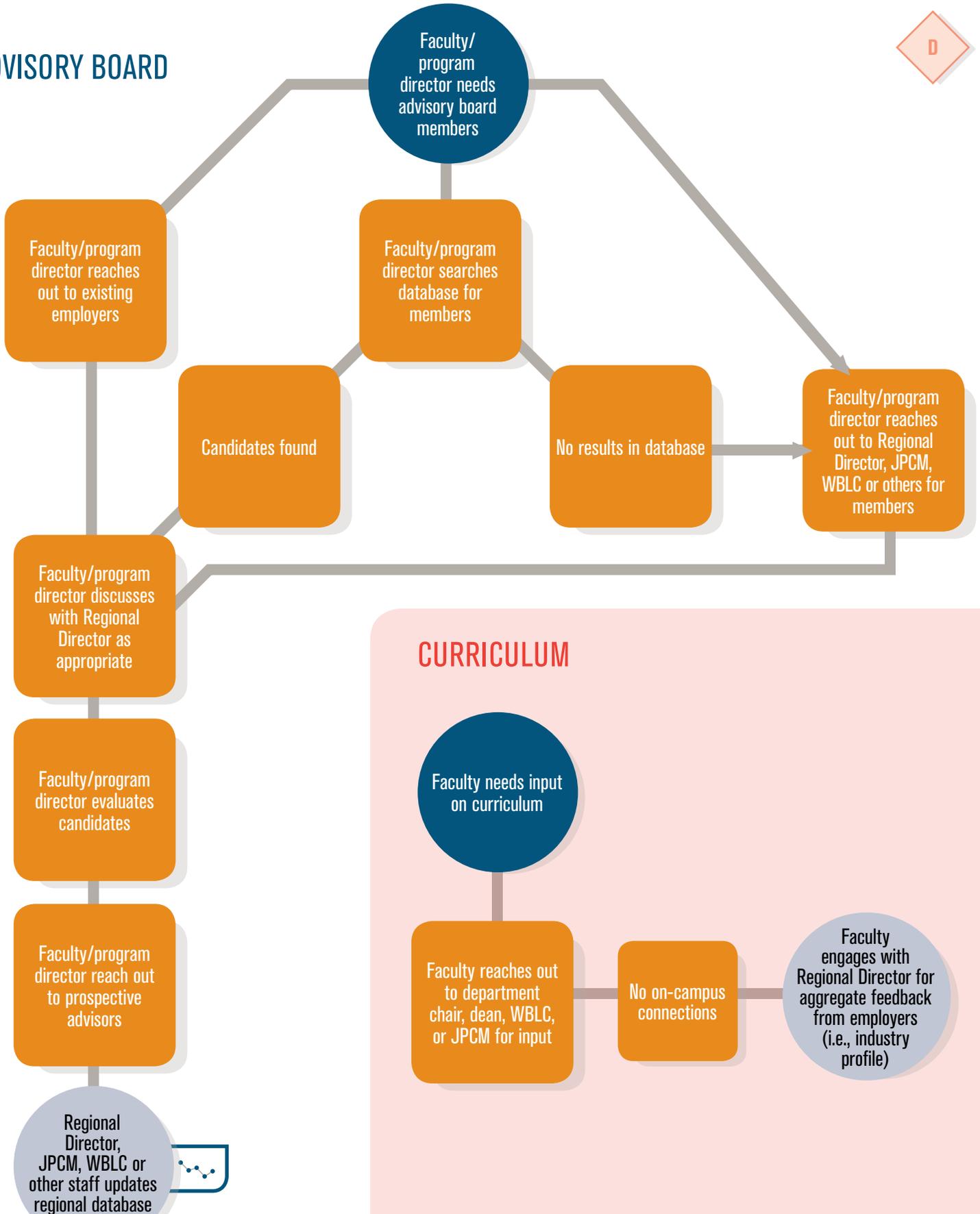


# Faculty Outreach to Employers for Advisory Board & Curriculum

11.04.19

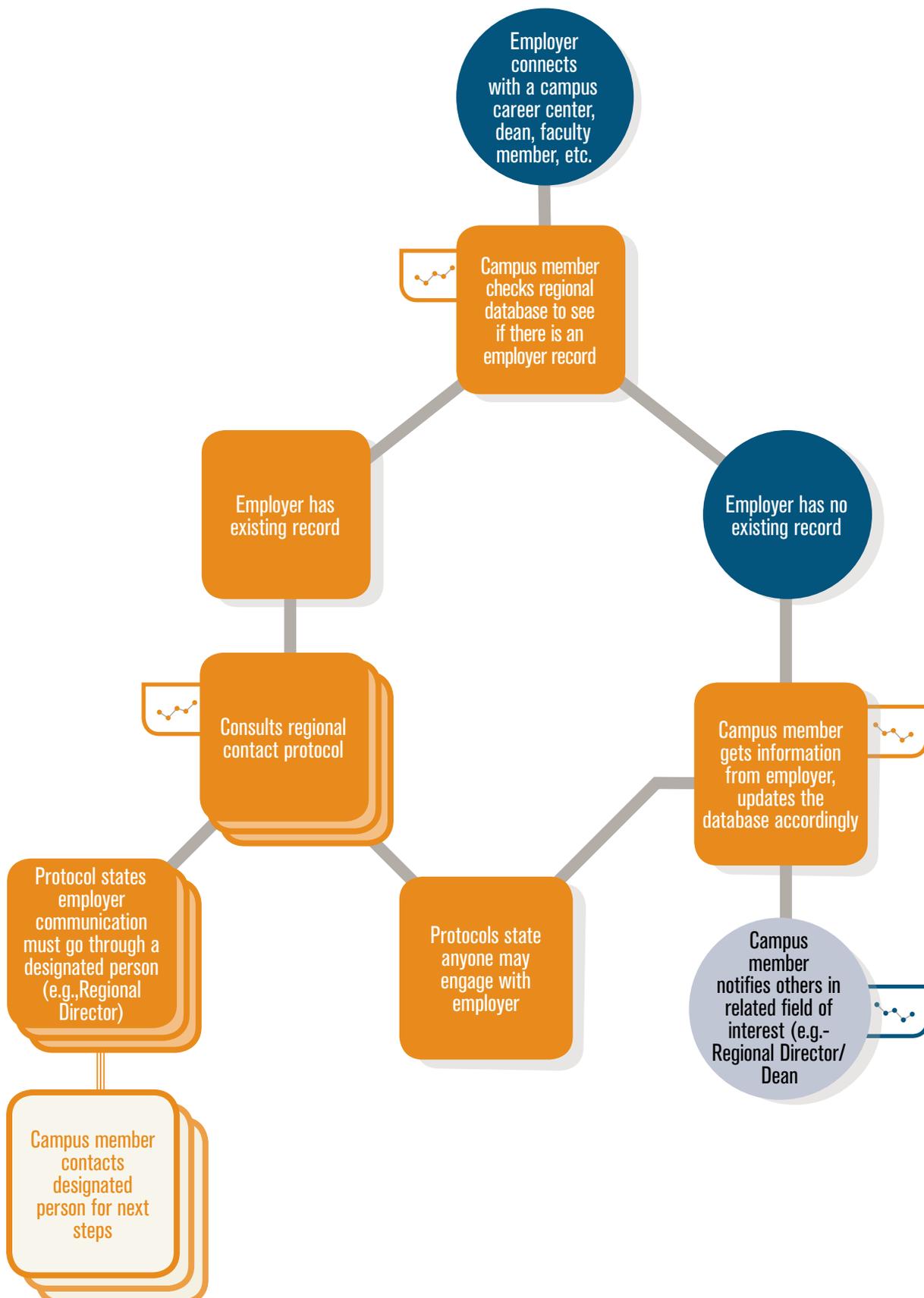


## ADVISORY BOARD



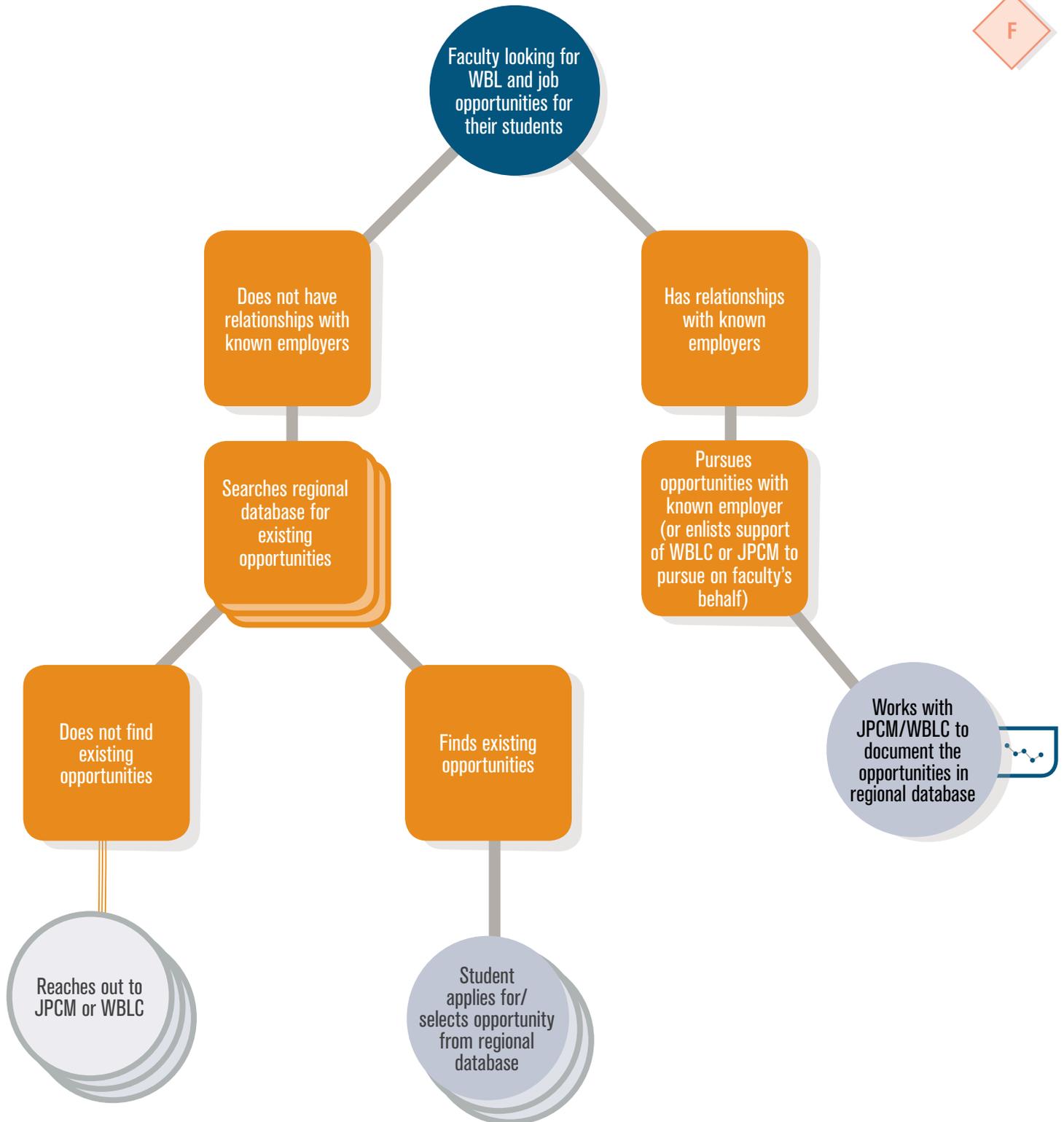
# Employer Outreach to Colleges

11.04.19

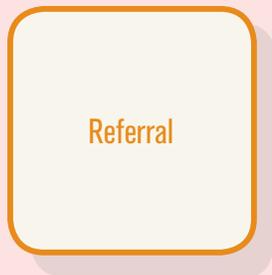
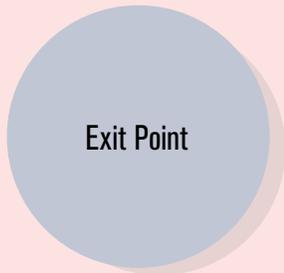


# Faculty Outreach to Employers for Job/WBL Opportunities

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## LEGEND



Data Points for Collection



Possible extension step

## APPENDIX H: Operationalizing Process Maps Worksheet

Example: Faculty Requests WBL Opportunity

Process Step	How	Who	What's documented	Timeframe or due date	Connection to	Then what	Implications
	<i>How does the step happen (e.g., in person, by phone, via email)?</i>	<i>Who is involved? Who needs to know about this?</i>	<i>What information should be documented? In what format? Where will it be captured? Who needs to see it?</i>	<i>When should this happen? Is it time sensitive?</i>	<i>What is this connected to?</i>	<i>What happens next (if not already represented in the process steps)?</i>	<i>What systems, structures, processes, need to adjust in order to implement this step in the process?</i>
Faculty requests WBL opportunity for their class from WBLC							
WBLC discusses project ideas and opportunities							
WBLC provides guidance for faculty to utilize existing WBL opportunities							
WBLC works with faculty to develop new WBL project							
WBLC coordinates and records new curriculum and data for the project as it is developed							

	<b>How</b>	<b>Who</b>	<b>What's documented</b>	<b>Timeframe or due date</b>	<b>Connection to</b>	<b>Then what</b>	<b>Implications</b>
<b>Process Step</b>	<i>How does the step happen (e.g., in person, by phone, via email)?</i>	<i>Who is involved? Who needs to know about this?</i>	<i>What information should be documented? In what format? Where will it be captured? Who needs to see it?</i>	<i>When should this happen? Is it time sensitive?</i>	<i>What is this connected to?</i>	<i>What happens next (if not already represented in the process steps)?</i>	<i>What systems, structures, processes, need to adjust in order to implement this step in the process?</i>
WBL project is tested, assessed, and reviewed with the aid of the WBLC							
Opportunity entered into the regional database							

## APPENDIX I: Pathway Navigation – Change Process

### Communication Plan: Who are the stakeholders and what do they need to know?

Stakeholders are an important component of a change process. Communication is key. This worksheet is designed to help you design a communication plan that outlines your communication goals, and identifies the various, relevant stakeholders, and the details for how best to communicate with them.

Instructions:

1. Describe the context of your communication plan. What are your objectives? What challenges are you trying to address?
2. For each objective (or purpose), identify all the stakeholders that have interest in or will be impacted by this challenge/objective (add rows, if needed).
3. For each stakeholder describe what they need to know, how best to communicate with them and how often, and who will be responsible.
4. Add any special notes and specific next steps, as needed.
5. Repeat for each objective.

**Background:** What is the context of the communication plan? What are the challenges? What are the overall objectives? (e.g., secure buy in, curtail rumors or misinformation, etc)

**Purpose or Objective (from list above):** \_\_\_\_\_

Stakeholder or Audience (who)	Message or Information (what)	Method or Approach (how)	Timing and Frequency (when)	Responsible Person (who)

**Notes:**

**Next Steps:**

Purpose or Objective (from list above): \_\_\_\_\_

Stakeholder or Audience (who)	Message or Information (what)	Method or Approach (how)	Timing and Frequency (when)	Responsible Person (who)
<b>Notes:</b>				
<b>Next Steps:</b>				

Purpose or Objective (from list above): \_\_\_\_\_

Stakeholder or Audience (who)	Message or Information (what)	Method or Approach (how)	Timing and Frequency (when)	Responsible Person (who)
<b>Notes:</b>				
<b>Next Steps:</b>				