February 22, 2024
Attn: CWDB State-Funded Grantees
RE: Participant Data Collection System Change

Notice of Data Collection System Rollout

The California Workforce Development Board (CWDB) is working toward developing an internal data capture system for all state-funded grant programs. This effort was set into motion nearly two years ago with the rollout of the Cal E-Grants (CEG) portal used for grant solicitations, followed by grant management. The CWDB is now transitioning to the CEG platform as a participant data capture system for all state-funded grant programs.

Since CalJOBS was built to report WIOA-funded activities to the Department of Labor, it has been challenging for both CWDB staff and many of its grantees to use for non-WIOA grant data collection. While the State Grant Data Solution (SGDS) provided flexibility with reporting participant data, it was intended only to be an interim solution until the data modules in CEG were completed. The CWDB is pleased to announce that the first stage of the participant data module has been developed and is being rolled out for all CWDB's state-funded programs.

The CWDB is taking a phased approach to ease the transition into the new data reporting system. CWDB intends for CEG to provide all the same functions as CalJOBS for state-funded grants. Because this cannot happen in one step, the transition to CEG will occur in phases. The first stage of this transition has started, and there are elements of the platform that are still under development, such as the ability to utilize CEG as a Customer Relationship Management (CRM) system for case management purposes. Currently, CEG does not integrate with CalJOBS. The CWDB is presently exploring this, but it will not be in place in 2024. As the development advances, additional functionality will be rolled out in the subsequent phases outlined below.

Transitioning to CEG provides an improved data collection system for CWDB and grantees. With user experience at the forefront, our goal is to develop a platform that will be a valuable tool for our grantees to continuously improve their programs and services by providing a clearer picture of aggregate participant data and project outcomes and flexible and streamlined participant data entry. The CEG data module will also give the CWDB authority to implement needed improvements and respond directly to grantee inquiries regarding data change requests or technical issues on an ongoing basis.

About Cal-E-Grants

Cal E-Grants (CEG) is a Salesforce-based platform that currently houses the functionality for grantees to submit grant applications, monthly invoices, modifications, and semi-annual narrative reports for grant programs and will now be used to collect participant data for state-funded programs as well. Grantees accessing the CEG platform will also use their current accounts to report participant data. New accounts can be created by managers in CEG for any additional users who need access to enter data.

The data collected in CEG will closely resemble those previously collected in CalJOBS and SGDS. The CWDB will provide guidance regarding how to use and submit participant data for reporting requirements. A recorded walkthrough tutorial of the CEG system and live Question & Answer sessions (Office Hours) with the research team will be available in the coming months. Also, individual meetings with the research team can be scheduled upon request after the walkthrough tutorial has been reviewed and the office hour sessions have taken place.

Grant Program Start Dates

State-funded grantees will begin entering their new participant data in CEG instead of SGDS/CalJOBS on the following dates.

01/29/2024: Regional Equity and Recovery Partnerships (RERP)
03/11/2024: Prison to Employment (P2E)
03/11/2024: High Road Construction Careers (HRCC: RWF)
03/25/2024: High Road Training Partnerships (HRTP: RWF)

Office Hour Sessions

The CWDB Research Team will hold several office hour sessions during which all questions are welcome. Office hours will be on Zoom and are open to anyone managing/overseeing any CWDB program. Sessions will be from 1 p.m. to 2 p.m. on the following dates:

January 31, 2024 (Completed)
February 14, 2024 (Completed)
March 6, 13, 20, and 27, 2024
April 3, and 17, 2024
July 3, and 17, 2024

Office Hours Zoom Link: https://us06web.zoom.us/j/89296450965

The Cal E-Grants Vision

Phase I (completed in 2022):

During Phase I of the rollout, resources regarding the data capture options were made available to all state-funded grantees.

- Grant applications submitted via CEG
- SGDS Workbook and Supplemental Report made available

Phase II (completed in 2023):

As part of Phase II, the CWDB provided ongoing technical assistance through webinars, office hour sessions, and meetings with grantees on an as-needed basis to address any issues related to data reporting.

- Grant invoices, modifications, and narrative reports (grant management) in CEG
- Technical assistance is provided with each grant rollout
- Ongoing solicitation and grant management enhancement and development

Phase III (initial completion in 2024—Current Stage):

Phase III is marked by the initial completion of the data module on the CEG platform and data migration from CalJOBS and SGDS to the new platform.

- Grant participant data transitioned to CEG
- Recorded webinars and process manuals made available

Phase IV (expected in 2024):

Phase IV will be marked by the release of Version 2 of the data module that improves issues identified during Phase III.

- Release of Version 2 of the participant data module in CEG
- Technical assistance ongoing

Phase V (expected in 2025):

Phase V will be the release of a case management module within CEG. This functionality does not exist currently but will be explored for release in 2025. CWDB expects to release updated versions of the platform beyond Phase V on an as-needed basis indefinitely.

- Grant participant case management in CEG
- Technical assistance ongoing

Data Transition Expectations

Grantees expect to use CEG for new data when your grant goes live and transition your old data over by **09/01/2024**.

The CWDB Research Unit will provide customized technical assistance to grantees upon request to transition data from CalJOBS/SGDS to CEG for participants who have exited the program and/or received job placement. All participants still in your program and receiving services should be added to CEG as soon as possible so that past activities are logged. CWDB will be available to guide data migration and provide individualized technical assistance as needed. Moving forward, CWDB will create supporting user guides and provide training as new CEG features are completed and rolled out.

The CWDB seeks to continuously improve customer service and support grantees in meeting the needs of the individuals and communities they serve. We appreciate feedback from all our grantees and look forward to collaborating to develop solutions to any complex issues that may arise due to this transition. Feel free to contact our Research Unit directly by emailing ResearchUnit@cwdb.ca.gov with any questions or concerns about the new data collection system.