



Replacement Project Replacement Discovery Events Feature Summary

Purpose

The purpose of this document is to capture a high-level description of targeted functionality for the 'minimum replacement product' (MRP) event-related capabilities that will be built into the [REDACTED] platform. It also compiles references to supporting materials that have been generated through discovery activities by [REDACTED], provides contextual information relating to the fit of the events feature in the [REDACTED] website, connects the feature to the business goals and needs of [REDACTED] who will benefit, and describes other details relating to the anticipated implementation approach.

Note: In the near future, the [REDACTED] URL will be updated to a .gov URL, but for the purpose of this document will continue to be referred to by its current URL, which is [REDACTED]

Background and Current State

One of the primary ways the [REDACTED] staff members reach and provide guidance to job seekers is through events. [REDACTED] currently supports, or facilitates the delivery of, multiple types of event-based services, including not only [REDACTED] sponsored events but also events provided through established partners as well as external parties like employers. These include in-person, virtual, and phone-based meetings, workshops, and 1-on-1 consultations, as well as skill-building events, job fairs, job clubs, and networking opportunities. They are an opportunity for job seekers to receive customized support in their process of obtaining employment, and it's important that event-related functionality offered within [REDACTED] is robust, thorough, and user-friendly both to staff members who manage events and end users browsing and registering for events.

In the current state, [REDACTED] website provides end user access to events, along with basic filtering and searching of upcoming events, as well as other supporting features such as automatic un-ublication of past events. Registration for all events currently involves [REDACTED] so the current state requires





a visitor who might have found the event on [REDACTED] to have an account with [REDACTED] in order to register, and there is no current integration or alignment between the two sites.

Planned Functionality for MRP

Event Catalog

The planned implementation of the events system in [REDACTED] revolves around the concept of an event catalog, which enables strict management of pre-defined events that individuals with scheduling permissions work from. Nearly all events that can be scheduled and published through the [REDACTED] website will be based on a master or parent event that is first defined in the event catalog, and a relatively narrow number of authorized staff members will have responsibility to manage the catalog. The catalog will ensure events are initially set up correctly, including that they correctly align to PIRL codes that are crucial for reporting and outcomes measurement, though not all events managed in the calendar will have the same requirements for reporting or connecting to PIRL. The hierarchical relationship between the catalog and scheduled events, along with carefully set user permissions, will help ensure scheduled events are appropriate, consistent, and do not introduce unexpected or unintended variation that could impact reporting capabilities of the department.

The information managed at the catalog level will include the general type of event, whether it can be offered virtually, in person, or both, and who can publish it. Information managed at the individual instance level will include the capacity of the event, its location, day and start/end times, and other key details. Event instances will always be linked to or offered through a [REDACTED] location, however the scheduling user will have the option to specify an alternate location for events not being held at [REDACTED] site but at another community setting such as a local library. This will solve a pain point in the existing system because that concept of an alternate location is not generally supported.

Job Seeker Experience Enhancements

From an end user experience standpoint, multiple improvements are planned, including richer filters that expose more options that allow a user to find events of interest, and shortcuts on the events listing page that help a user quickly reach certain types of events or popular filters. The design also surfaces additional details





about the events themselves, including tags (topic) and format / delivery information. Similarly to the job search experience, the event listing has been designed to include mid-list 'ads' for a streamlined and integrated way for users to encounter event-related promotions, such as invitations to pursue one-on-one appointments. The event calendar will remain very 'real time' with events being retired from the UI automatically once they are in the past, using a batch which runs every 15 minutes, so that the first 15 minute increment after the start time would cause the event to disappear to an end user.

This implementation will further improve upon the end user's registration process by consolidating it into a single site. [REDACTED] anticipates business rules built into the system that will require the collection of additional information about the registering user if it has not previously been obtained. Holistically, this supports a goal to make account registration relatively low-barrier, and involves multiple points throughout the account holder experience in which the individual would be asked to provide more information, rather than being asked every possible field upfront. This workflow will be covered in greater detail in the User Accounts and Registration feature summary.

The job seeker user, when logged in, will be able to access their list of upcoming/registered events as well as past events, which will generally show the individual's presence / attendance at events that occurred in the past according to the recording of attendance by staff members. From this list, the user will also be able to cancel their registration.

Attendance Tracking, Waitlists, and Priority Placement

An important part of delivering event-based services as well as monitoring utilization is attendance tracking. The new events capability will include a friendly, efficient user interface for staff members to capture attendance at events, though the process will still involve manual cross-referencing between the registration list and the participants present at the event itself.

A connected feature is the waitlist - scheduling the instance of an event will include setting the capacity of the event, so that the system can apply automation to enable registration by end users as long as the event has remaining capacity. Once that capacity has been met, the event will continue to allow users with priority of service to add themselves to the waitlist instead of registering. The waitlist will only be available for those with priority service. Other users will be prompted with different





language when an event is full. Authenticated users who do not receive priority of service based on veteran or related status will be shown similar events. Anonymous users will be encouraged to create an account if they are veterans to join the waitlist. [REDACTED] will manage the waitlist manually, by changing the status of a registrant from "Waitlist" to "Registered." They will also be responsible for reaching out to those on the waitlist and informing them a spot has opened up.

External Events

There are two types of external events that can be submitted to appear on the events page. These two event types differ in how they are added to the site, but do appear in the centralized, blended list of events. It will be fairly invisible to the job seeker browsing events that these differ from [REDACTED] events.

The first type of external event will be initiated by an anonymous end user (general use case is that this person is a representative of an employer who is running an event) accessing a public-facing form to submit their event. This type of event is shared within the [REDACTED] site but isn't within the scope of [REDACTED] responsibility for delivery or reporting. If deemed acceptable upon review by a member of the [REDACTED] staff, the instance is published and can then be found by end users on the events page. Registration for these does not occur within the [REDACTED] instead these will link to an external destination provided on the event submission form. Additionally, there is no connection between these and PIRL codes, attendance is not recorded using [REDACTED] systems, these do not originate in the event catalog, and reporting is not involved.

The second type of external event is one that is submitted by providers. Providers are [REDACTED] partners who have been vetted and have [REDACTED] accounts. The experience for submitting events by providers is similar to that of the [REDACTED] staff, where they will have access to a catalog of events. The catalog items available to providers differ from those accessed by [REDACTED] staff. It will have different catalog items to choose from. Providers will have the ability to request a new event if it is not in their catalog. After a provider schedules an event, an administrator will review and approve it before it appears on the site. Registration will take place on [REDACTED] for provider-submitted events.

Trainings





Trainings are different from other events held in the [REDACTED] site in several ways, but will also be included in the implementation. They have a separate page from the events page. Trainings are programs that are 1-3 months and result in new skills for the attendee. Trainings are generally held by providers, who are vetted account holders in the [REDACTED] site. There will be a public-facing form that providers can use to request a new training event be added to the trainings page. Once submitted, an administrator will review and approve the training to be added to the trainings page. From an end user standpoint the dedicated training page will use many of the same UI elements including the basic presentation of the list of events and the sidebar placement of filters. The training event creation / edit experience has been designed to clearly layout all metadata fields required to define a training offering, to help ensure published trainings provide the minimum and required details so the event is clear to interested participants.

One-on-one Appointments

Because 1:1 appointments are fundamentally different from events that can be attended by multiple individuals, they will be held within a dedicated page in the [REDACTED] UI, and the user interface for browsing and finding 1:1 appointments will vary from the main event listing. These event types still originate from and are managed in the event catalog, and reporting for this type of event (including service and activity tracking) is important for this type. Registering for an appointment involves booking the time slot that has been made available and allows the participant to indicate how they will attend the appointment and the topics they wish to cover. Once a 1:1 appointment is booked, it disappears from the listing and cannot be booked by another user.

Recurring Events and Rolling Publication of Events

For MRP, there will be limited capabilities in the system for a content manager to publish that an event is recurring or a series. At the time of scheduling an event, [REDACTED] staff can indicate that the event is recurring. The two recurring cadence options are weekly and every other week. All other event details remain the same for every occurrence. Future occurrences will remain in an inactive status until being published through automation.

The business expressed the importance of not having a large number of future events available for an end user to browse. The focus is on providing a relatively limited amount of time projected forward with published events in the [REDACTED]





UI. This is because it is important to keep job seekers focused on more immediate events that are available and minimize the potential for confusion or the scenario of a customer registering for an event in the future when there is a sooner one available. The system will use automation to publish scheduled events on a rolling basis to minimize the manual effort required of [REDACTED] staff to keep the event catalog published.

Reminders for Upcoming Events

Registered users will receive a reminder email for the event one day prior to the event, and also on the day of the event. For online events, users will receive the link to join the event included in their reminder emails.

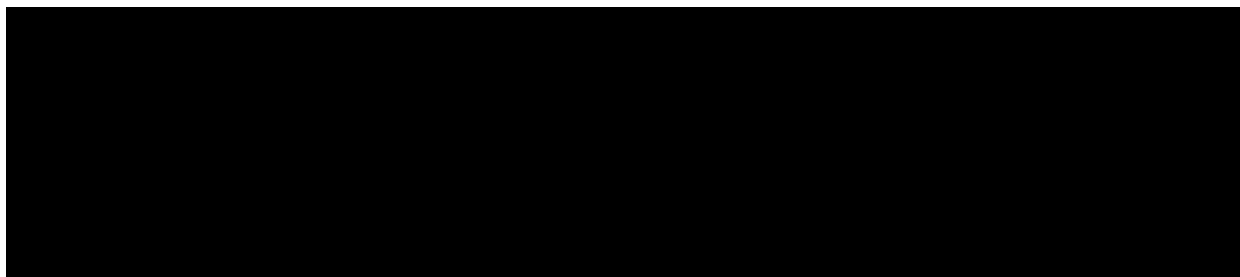
Private Events

[REDACTED] staff have the ability to schedule private events, which have the same general functionality as other events, but they do not appear on the event listing page. Staff can share a link to a private event, which will bring the site visitor directly to the event's detail page. Staff can specify an event is private at the time it is being scheduled. Generally any event from the catalog could be scheduled as a private event. Beyond this they are managed in the same way as non-private events.

Post-MRP Enhancements

- Content manageable / configurable buttons (note: this has analytics collection implications that should be addressed if this feature is pursued)
- Integration with virtual conference tools for speedier or automated attendance tracking
- Multi-day event configuration for provider events

Related Discovery Resources





Requirements Traceability Matrix (RTM) - See Sharepoint

Anticipated Implementation Epics

- Event catalog and user permissions to edit, add, and delete entries
- Event scheduling workflows - [REDACTED] sponsored (including 1:1 appointments), partner-sponsored, and externally-sponsored
- End user access to event listing, search and filters
- End user access to 1:1 appointments, search and filters
- End user access to training events, search and filters
- Registration and wait list, including tiered intake questions for account holders and priority placement
- Attendance management and job seeker ability to cancel registration
- Recurring events and series
- Private events
- Events service and activity tracking (note: this will be covered in more detail in a separate feature summary)
- Reporting and monitoring

Dependencies and Potential Order of Implementation

The newly designed events features in [REDACTED] will have some interdependencies on other to-be-built features. Firstly there are connections between this functionality and associated service and activity tracking features, so we would expect to implement a portion of service and activity tracking capabilities along with the events functionality, in support of [REDACTED] need to record services that are provided in this area.

Additionally, event registration requires the user to be an account holder and authenticated; we anticipate that a new account login system supporting identity and access management (IAM) will be an important functional predecessor to implementing the event features. [REDACTED] registration is required for users to register for events, so the tiered registration functionality will need to be in place to support registration features. From a migration standpoint, [REDACTED] expects that important migration-related activities will need to be associated with work on this feature, to bring over job seeker accounts and possibly their existing registrations for upcoming events.





There is an option to break the desired functionality up and release it incrementally, which would expedite our ability to deliver some of the core value of the features to end users, even if some pieces of it are deferred to a later point. A potential sequencing of work within this feature area, which would support incremental releases, is as follows:

1. Event catalog and event scheduling/publication workflows  and provider-sponsored), including registration / tiered registration, wait list management, and attendance recording, as well as service and activity tracking and reporting/monitoring capabilities, and including user access to past and upcoming events.
2. Addition of externally-sponsored event capabilities, such as the public-facing submission form and admin views and functions to vet and publish
3. Training calendar and associated content and workflows
4. Minor enhancements such as messaging relating to earlier events that are available
5. Recurring events and series
6. Private events

