

ELL Co-Enrollment Pilot Project Resource Guide: Platforms and Tools for Engaging Clients Remotely



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I. Introduction

This document contains resources intended to guide strategy for engaging ELL Co-Enrollment clients during the COVID-19 crisis. The COVID-19 crisis has resulted in California implementing “safer at home” orders beginning in March 2020 and these orders have significantly impacted workforce service delivery activities across the state with nearly all services moving to an entirely or primarily remote service delivery model. It is especially important for ELL Co-Enrollment project teams to think critically about the platforms and tools they are selecting to enable this remote service delivery given the digital literacy and language barriers of the target population.¹

This resource guide is designed to:

- 1) Present a framework for thinking about what tools and platforms should be integrated into remote service delivery for ELL Co-Enrollment teams;
- 2) Provide information on platforms and tools that can be used to facilitate remote service delivery. This information is presented in a manner that can help teams select the platform or tool that is best suited to the project activities they are trying to complete and the digital skill level of the client(s) they are serving;
- 3) Provide information on best practices in using digital platforms and tools to provide remote services to the target population.

It is intended for use among all ELL Co-Enrollment project partners, including direct service staff and management.

II. A Framework for Selecting Digital Platforms and Tools to Support Remote Service Delivery

¹ In the Survey of Adult Skills, conducted under the auspices of the Organization for Economic Cooperation and Development (also known as the Program for the International Assessment of Adult Competencies, or PIAAC) is administered by National Center for Education Statistics of the Institute for Education Sciences at the U.S. Department of Education, while immigrants made up 15% of the respondents, they comprised 38% of those that fell into the “no digital skills” category and 23% of those that fell into the “limited digital skills” category.

The five-pillar framework below can help form the basis of project team conversations about the choice(s) the team makes in selecting specific digital tools and platforms to support remote service delivery.

Framework Pillar	Why it is Important
Digital literacy and language needs of clients	ELLs have lower levels of digital literacy than native-born Americans and language barriers can add additional challenges with interpretation and it is critical that client-centered choices are made
Specific tasks and activities will require different platforms and tools	Making decisions based on both the specific tasks and activities that need to be completed as well as on the goal of the broader project - helps avoid the pitfalls of one-size-fits all decision-making
Partner and project team infrastructure	Decisions on digital platforms and tools that are aligned with the hardware and software infrastructure of partners will be easier to implement and sustain
Flexibility and responsiveness	Teams are operating in a dynamic environment and being able to respond to social distance policy changes, the specific digital skills and resources of the target population over time, the skill(s) of project staff, and more are all critical in crafting a durable, responsive plan
Safe and secure	Teams must continue to uphold all necessary standards regarding PII and the sharing and storing of sensitive information

As ELL Co-Enrollment Project teams use the framework above to discuss the choice(s) they are making about using specific digital platforms and tools to engage clients with remote services, the following additional guidance is provided:

- **When possible give clients the opportunity to choose the medium of communication that they prefer.** Although some platforms appear operationally similar, for clients building foundational digital literacy skills, adapting their skills/knowledge to even a slightly different interface can be difficult. Use initial check-ins with clients to engage them on which digital platforms they feel comfortable using.
- **Clients may be using tools or platforms in other areas of their life right now** – ask them about this and follow their lead when possible.
- **Coordinate client communication across partners** in order to minimize the number of tools and platforms teams are expecting clients to use.
- It is **inherently difficult to remotely engage clients who have low digital literacy skills**. With any platform, there will be a barrier to entry and for teaching digital literacy, nothing can replace one-on-one instruction to help users become more comfortable. Refer to section IV of this resource guide, “Best Practices in Using Digital Platforms and Tools in Serving Clients Remotely,” for additional strategies on engaging clients with low digital literacy skills.
- **Think about information security in particular at the level of the task or activity.** This approach allows maximum latitude in using some easier-to-use options for general communications, while ensuring that proper security measures are in place when it comes to exchanging specific types of PII or sensitive information.
- In general, **if the level of security of a specific tool or platform is not known, refrain from using it to share/send sensitive information.** Check with your organization’s IT team on the safety and security of a platform or tool prior to use.
- Make sure that all project partners have an understanding of the **resource cost of the choices** being made.
- Make sure all choices are **allowable by organizational-level and funder-level guidelines** of project partners.

III. Selecting Platforms and Tools

This section is organized around types of remote service delivery including: one-on-one case management services, group coaching and instruction, and self-guided skill development.

It is not meant to include a comprehensive list of all tools or platforms or tools but rather, a compilation of some of the more common and accessible platforms and tools with an emphasis on those that are familiar to large numbers of people and are low-cost or free. *This resource guide is not intended to officially endorse any particular platform or tool but rather to provide options for consideration.*

Finally, many of the tutorials listed in this section rely on being able to turn on subtitles on in YouTube, which can frequently be automatically translated to a wide variety of languages (imperfectly). It is recommended that staff engage in short one-on-one targeted assistance to help clients access this specific function on YouTube to increase a client’s ability to benefit from these types of YouTube tutorials. [See this tutorial](#) on for instruction on how to turn on YouTube subtitles in over 60 different languages.

III.A One-on-One Case Management Services

Tasks that ELL Co-Enrollment project staff might need to complete as a part of one-one-one case management services include:

- Check-in and establishing a new way of working together;
- Assessment of current needs;
- Referrals;
- Verbal conversations and coaching;
- Helping clients decipher new information they are receiving from education and training programs, employers, public benefits, or co-enrollment partners;
- Capturing information that supports documentation of outcomes.

It should be noted that while basic phone calls are often the simplest approach for clients with low digital literacy levels, there may be significant benefit to trying to use one of the platforms or tools below instead of a phone call. Specifically, these platforms and tools may provide the additional benefit of screen sharing, options to send a single message to an entire caseload, and importantly, offer protections to project staff who may not have access to employer-provided cell phones and are concerned about their privacy in working from home using their personal devices.

Platform/App: Google Voice	
<u>What this tool could be used for:</u> Providing phone and text based case management services to clients	
<u>Pros:</u> <ul style="list-style-type: none"> - Ability to initiate and receive calls and texts to and from any phone number - Flexibility to conduct calls through Google Hangouts on a computer over WiFi - Opportunity to preserve a work phone number separate from a personal phone for project staff that may not have a work cell phone 	<u>Drawbacks:</u> <ul style="list-style-type: none"> - Can be time consuming and clunky in practice compared to regular phone call - Limited ability to send mass or group text messages
<u>Digital Literacy Challenges for Clients</u>	
<ul style="list-style-type: none"> - A client must be comfortable answering a phone call from a number they may not recognize 	
<u>Tutorials and Resources</u>	

- [Features of Google Voice](#)
- [Set-Up](#)

Platform/App: WhatsApp

What could this tool be used for: Providing phone, text, and video call case management services to clients

<p><u>Pros:</u></p> <ul style="list-style-type: none"> - Simple and adaptable platform for sharing videos, links, or other coaching materials as well as making voice and video calls - Ability to set up groups of any size through which to share information and foster discussion among clients 	<p><u>Drawbacks:</u></p> <ul style="list-style-type: none"> - WhatsApp must be set up through a number that can receive a text message verification code, typically a cell phone. For those that do not have a work cell phone, this can make it difficult to keep your personal number private from clients.
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Digital Literacy Challenges for Clients:

- For some individuals, the typing aspect of WhatsApp may be difficult while the voice and video calling functionality may be easier

- Tutorials and Resources
- [Quick tutorial \(iPhone\)](#)
 - [Longer tutorial](#)
 - [Setting up WhatsApp](#)

Platform/App: Facetime

What could this tool be used for: Case management services in a video call format

<p><u>Pros:</u></p> <ul style="list-style-type: none"> - Simple functionality similar to that of initiating and receiving voice phone calls - “Face to face” video calls more closely mimic meeting in person and can support building and maintaining trust with clients during social distancing - New Apple products allow for group facetime calls as well as 1:1 calls 	<p><u>Drawbacks:</u></p> <ul style="list-style-type: none"> - Only available with Apple products
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Digital Literacy Challenges for Clients:

- A client must understand how to answer a phone call and how to hold the phone in a manner that allows them to view the phone’s screen and camera

- Tutorials and Resources:
- [How to set up Facetime](#)
 - [How to Use Facetime](#)
 - [FaceTime in Groups](#)

Platform/App: Facebook Messenger

What could this tool be used for: Providing phone, text, and video call case management services to clients

Pros:

- Simple and adaptable platform for sharing videos, links, or other coaching materials as well as making voice and video calls
- Ability to set up groups of any size through which to share information and foster discussion among clients
- Utilizes a widely used platform many clients may already be familiar with

Drawbacks:

- Potential difficulty in maintaining clear lines between work and personal communication channels for both staff and clients

Digital Literacy Challenges for Clients:

- Some users may be familiar with using the Facebook Messenger app on their phone but unable to access it easily on a computer

Tutorials and Resources:

- [Basic Tutorial](#)

Platform/App: Google Calendar

What could this tool be used for: Organizing coaching sessions and classes with clients

Pros:

- Ability for clients and Navigators to more simply coordinate meetings and trainings simultaneously with multiple parties
- The calendar tool can be set to send a reminder to clients at a pre-determined interval before a scheduled event

Drawbacks:

- May not be a convenient tool for clients if they are not already in the habit of using an online calendar
- Requires meeting clients to have an email account

Digital Literacy Challenges for Clients

- Understanding the difference between accessing an event on a computer or phone. Clients may receive an invite on one device and not know how to access it on another.
- Understanding the calendar in such a way as to identify and respond to event conflicts

Tutorials and Resources

- [Adding a Calendar Event in Android](#)
- [Guide to Calendar with a focus on start/setup](#)
- [Google Calendar for mobile advanced tutorial](#)
- [Creating Events in Calendar](#)
- [Responding to Calendar Events](#)

Platform/App: Remind App

What could this tool be used for: Individual and group case management and file sharing

Pros: <ul style="list-style-type: none">- Ability to translate messages into over 90 different languages all within the app- Connects with materials on Google Drive, Microsoft OneDrive, Box, Google Classroom and other online cloud based storage tools- Allows for two-way messages and discussion both 1:1 and in multiple groups simultaneously- Messages can be sent live or scheduled in the future	Drawbacks: <ul style="list-style-type: none">- Some functions are only accessible when all clients have downloaded and are using the Remind app
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Digital Literacy Challenges for Clients

- Clients must be comfortable reading and responding to text messages on a phone OR downloading the Remind app to their computer and creating a login

Tutorials and Resources

- [Basic Tutorial](#)
- [Leveraging Remind for Group Instruction](#)
- [Additional Resources](#)

Platform/App: Google Translate App

What could this tool be used for: Case management translation support

Pros: <ul style="list-style-type: none">- Provides real-time text translation between 109 different languages and real-time voice translation between 37 different languages- Can be used on a cell phone app or on a computer- Ability to translate via a phone’s camera tool, handwritten words, a live conversation, and voice recordings	Drawbacks: <ul style="list-style-type: none">- The live conversation tool works best when two individuals are close in proximity and can both speak clearly into the app. When this is not possible, creative work arounds must be used.
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Digital Literacy Challenges for Clients

- The Google Translate tool may not always provide grammatically perfect translations, requiring patience and flexibility on the part of the client and staff member
- While the Google Translate app provides text, audio, and image based translations, these messages must be sent and opened by the client through either a texting, voice or video based platform. The client must be comfortable using the selected platform in order to receive the translated messages.

Tutorials and Resources

- [Google Translate App for Phones](#)
- [Google Translate on a Computer](#)

As part of on-on-one case management in a remote environment, it can sometimes be helpful to have screen share capabilities either from client to staff or staff to client. ELL Co-Enrollment Project Teams might especially want screen share functionality to:

- Help clients read or understand information they have received from work, benefits, or education programming they are engaged in;
- Show a client a particular website, resource, or other document so they can walk through specific next tasks that a client may need to complete (e.g. create a log-in for an online learning system);
- Review documentation that supports recording outcomes.

While several of the resources mentioned in this guide have screen share functionality, the following option may be somewhat simpler and generally allow clients to screen share through simply clicking a link in a text message.

Platform/App: Screen Leap	
<u>What could this tool be used for:</u> Screen share functionality to support case management	
<u>Pros:</u> <ul style="list-style-type: none"> - The ability to “show” a client something on your screen while you talk through it including providing a visual example of a specific document, login or process - Allows visual sharing without needing to send and receive documents via email, text message or other format 	<u>Drawbacks:</u> <ul style="list-style-type: none"> - Security features are for viewing of normal information and not specifically tailored to sensitive information or PII
<u>Digital Literacy Challenges for Clients:</u> <ul style="list-style-type: none"> - Requires the user to be able to click on a link in a text message and conceptually understand that they are either looking at another person’s screen or another person is looking at their screen 	
<u>Tutorials and Resources:</u> <ul style="list-style-type: none"> - Basic Tutorial 	

III.B Group Coaching or Instruction²

Tasks that ELL Co-Enrollment project staff might need to complete as a part of group coaching or instruction include:

- Providing coaching or support to a group of clients that are in a cohort-based program;
- Supporting the development of specific skills such as resume development or interview skills;
- Providing opportunities to hear from partner(s), guest speakers, and others in a group environment

It is strongly recommended that project staff support account set up and check that clients can log in and access these platforms in advance of any scheduled group coaching or instruction activity to avoid challenges at the time of the session.

Platform/App: Skype	
<u>What could this tool be used for:</u> Video based case management, group meetings, and file sharing	
<u>Pros:</u> <ul style="list-style-type: none"> - Supports large groups of people connecting at once 	<u>Drawbacks:</u>

² It should be noted that the resources being presented for group coaching and instruction are primarily targeting an audience outside of traditional adult school providers. Adult schools – with their focused purpose on instruction and dedicated infrastructure and staff expertise around instruction – are typically going to have significantly more options in considering how to provide learning remotely. The information in this section will likely be most useful for organizations (e.g. CBOs, career center staff) that are providing some type of group engagement or skill building and do not currently have a robust, existing infrastructure in place for online learning.

<ul style="list-style-type: none"> - Allows the sharing of messages and files during video calls - Can be accessed both from a computer through the web and via a phone based app 	<ul style="list-style-type: none"> - The system is not particularly intuitive for clients with a low level of digital literacy - Registration and login includes a multi-step process that requires an email address - Does not allow the host to mute and unmute call clients
<u>Digital Literacy Challenges for Clients:</u> <ul style="list-style-type: none"> - Downloading Skype onto a computer or telephone requires several different steps and requires the individual to have an email address - Creating an account prompts the user to enter credit card information (though there is no fee when calling between two Skype contacts) - Using audio and video devices simultaneously can sometimes be difficult for those new to the platform 	
<u>Tutorials and Resources:</u> <ul style="list-style-type: none"> - Quick tutorial - Setting up Skype meetings - Longer tutorial just visuals 	

Platform/App: Zoom	
<u>What could this tool be used for:</u> Group meetings and trainings	
<u>Pros:</u> <ul style="list-style-type: none"> - Ability to record and simply share training sessions for later viewing - Can be used on desktops, laptops, mobile devices - Functionality to screen share, conduct polls, organize in-call breakout rooms, and have clients annotate the screen - One-way cloud based interpretation feature 	<u>Drawbacks:</u> <ul style="list-style-type: none"> - With a program like Zoom, there will be a high barrier for clients to access it for the first time without foundational digital literacy skills - Free version is restricted by time and number of clients - Interpretation feature is one-way in that it only translates the presenter’s speech to the audience and not audience questions or feedback back to the presenter
<u>Digital Literacy Challenges for Clients:</u> <ul style="list-style-type: none"> - Although clients do not need a Zoom account to get from an invitation in their email to the actual meeting, they will have to access several menus and buttons that are not intuitive and can be difficult - Users must connect their computer or phone’s audio and video components to the Zoom call. This sometimes requires a user granting permission for Zoom to access their devices audio and visual equipment. - Once on a Zoom call, it can be difficult to navigate between the main screen, the mute and unmute buttons, the chat, and any other features being used. 	
<u>Tutorials and Resources:</u> <ul style="list-style-type: none"> - Supportive resources developed for COVID-19 pandemic - How to teach an online lesson with Zoom - More in-depth - Joining a Zoom meeting 	

Platform/App: Google Hangouts
<u>What could this tool be used for:</u> Video based case management, group meetings, and file sharing

<p>Pros:</p> <ul style="list-style-type: none"> - May be more intuitive for those who are already familiar with using other Google based tools - Sessions can be recorded for later viewing 	<p>Drawbacks:</p> <ul style="list-style-type: none"> - Viewing a recorded session requires additional navigation and digital literacy skills
<p>Digital Literacy Challenges for Clients:</p> <ul style="list-style-type: none"> - Although joining a Google Hangout without having an email account it possible, it requires additional steps and digital literacy skills - Users with an existing email account will have a much simpler time accessing a Google Hangout however will still need to be able to access their email account, open the invitation email and click on the link to enter the Hangout 	
<p>Tutorials and Resources:</p> <ul style="list-style-type: none"> - Basic tutorial - Hangouts Meet Mobile Tutorial - Setup Google Hangouts 	

Platform/App: Microsoft Teams	
<p>What could this tool be used for: Group Meetings and Trainings</p>	
<p>Pros:</p> <ul style="list-style-type: none"> - Easily integrates chat features, audio and video calls, and file sharing on a single user interface - Allows for simultaneous group and 1:1 communication - More intuitive for existing Microsoft Office users 	<p>Drawbacks:</p> <ul style="list-style-type: none"> - The app is still relatively new and there are small ongoing functionality issues as improvements continue to be made by Microsoft.
<p>Digital Literacy Challenges for Clients:</p> <ul style="list-style-type: none"> - Receiving an invite for a Teams meeting requires the user to have an email address - Clicking the link to enter the Teams call from an email is not intuitive and requires the user to know where to look for the link - Using Teams can be simplified by using the Teams app however this requires an understanding of how to download the app to either a phone or computer device 	
<p>Tutorials and Resources:</p> <ul style="list-style-type: none"> - Inviting Guests to Microsoft Teams and Accepting Invitations - Inviting Guests to a Meeting - Joining a Meeting as an External Guest - Teams Meetings 	

III.C Self-Guided Skill Building³

³ It should be noted that the resources being presented for self-guided skill building are primarily targeting an audience outside of traditional adult school providers. Adult schools – with their focused purpose on instruction and dedicated infrastructure and staff expertise around instruction – are typically going to have significantly more options in considering how to provide self-guided

Tasks that ELL Co-Enrollment project staff might want clients to complete as self-guided skill building include:

- Learning specific tasks such as developing a resume or learning critical workplace health and safety standards in the COVID-19 context;
- Practice foundational skills including English.

In general, self-guided skill building options are best-suited for individuals that have at least intermediate digital literacy and English language skills and will often prove frustrating for those that do not. In cases where it is critical that clients master certain information or skills, it is highly recommended that some type of staff-involved skills check or assessment is incorporated as a part of service delivery.

Platform/App: Canvas	
<u>What could this tool be used for:</u> Classroom-like online guided learning	
Pro: <ul style="list-style-type: none"> - Canvas has extensive functionality to build out online learning specifically adapted to a particular client population and needs - Provides the functionality to build out an entire learning curriculum online using posts, presentations, discussions centers, activities, and learning modules. - Can be accessed on mobile devices or via a computer 	Drawbacks: <ul style="list-style-type: none"> - The free version of Canvas is capped at 500MB of material uploads - Canvas has extensive features and functionality that require an investment of time to sort through and build out for each class - Requires strong digital literacy for clients to interact with the course and use many of the Canvas features
<u>Digital Literacy Challenges for Clients:</u> <ul style="list-style-type: none"> - Creating an account and maneuvering between Canvas for Student and for Teacher - Navigating the course menu is usually only intuitive for someone who has experience with similar menus and is comfortable searching for files or links in a browser - More advanced functionality like assignments and discussions would present additional digital literacy challenges 	
<u>Tutorials and Resources:</u> <ul style="list-style-type: none"> - Tutorials from Canvas about setting up your course - Tutorial videos from Canvas about getting started as a student <ul style="list-style-type: none"> o Specific video about the Canvas Student App - Additional video guides from Canvas - Another Student Orientation Video (Clients will have to ignore the first few seconds because they are specific to the college producing the video) - One more Student Orientation Option 	

IV. Best Practices in Using Digital Platforms and Tools in Serving Clients Remotely

The following best practices will be helpful in ensuring that the target population of the ELL Co-Enrollment project teams are able to access and benefit from remote service delivery.

- **Text messaging** is a strong tool to simply check in with clients and is frequently familiar to even those with very low levels of digital literacy.

learning remotely. The information in this section will likely be most useful for organizations (e.g. CBOs, career center staff) that are providing some type of group engagement or skill building and do not currently have a robust, existing infrastructure in place for online learning.

- **Text message platforms that have broadcast capabilities** that protect individual client phone numbers can be an effective way to quickly conduct outreach, update an entire caseload on new information, and more.
- Some text messaging platforms allow the creation of sub-groups which can be helpful for creating **language-specific text groups**.
- **Screen sharing is powerful.** It can be used to walk through a presentation with clients, show them examples of documents during a conversation, and open the door to broader visual reinforcement of information you wish to convey. There are options for simpler screen sharing outside of a “full feature” platform such as Zoom and these may be easier for clients with lower levels of digital literacy.
- **Keep remote engagement with clients to a reasonable length of time**, recognizing that this is a different environment than talking to someone one-on-one and clients have a lot of new pressures in their home right now.
- Consider strengthening clients’ ability to use digital platforms and tools **by building in regular opportunities to practice** – this will help them feel more confident in accessing both your services and other services in this era of social distancing.
- Make sure you **understand specifically what the client will have to do to access a specific tool or platform**. In general, clients with lower levels of digital literacy will have an easier time with tools or platforms that do not require them to set up an account, download new programs or apps, etc. and instead are accessible through a basic link sent through a text message.
- If a platform or tool requires registering or downloading an app in advance, **consider calling clients individually 1-2 days in advance before having them participate in a group call to walk them through the process of registering and getting set up**; this will give everyone time to complete this task and you can troubleshoot challenges without worrying about a class that is about to start.
- If working with a group of clients together, **consider having a co-host on your platform** (e.g. Zoom) so one person can lead on providing the content/engagement and another staff member can troubleshoot technical issues among clients.
- Remember that the **platforms and tools used for communicating information or building skills do not have to be the same for assessing that that information has been learned or that skills have been mastered**. Consider staff-involved, live assessment of learning and skills (e.g. a follow-up phone call) after clients have participated in a more self-guided activity.
- **Coordinate across programs and partners** to minimize the number of tools and platforms clients need to learn and use.
- **When using an interpreter, ensure in advance that they are familiar with and know how to use the platform you are selecting** for a specific interaction with a client. Consider having a call with your interpretation resource provider in advance to strategize about how you will work together.

Additional Resources on Using Digital Tools for Remote Service Delivery

- HHS Guidance on [Virtual Case Management Considerations and Resources for Human Service Programs](#)
- National Skills Coalition [blog post](#) on digital literacy challenges illuminated by COVID-19
- Hanover Research report “[Expert Interviews: Developing Online Programming](#)” provides guidance and considerations for building online learning programs
- [Language Access in Times of Crises: Getting Started with Video Remote Interpretation](#) by Switchboard