Coordinating Intake

When Data Systems Don't Talk to Each Other

PowerNotes LLC

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Mary Ann has extensive experience in workforce development with more than 40 years at the local, state, and national levels of the system in leadership positions.

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Seminar Leader

Seminar Description

The Workforce Innovation and Opportunity Act provides opportunities for more effective coordination among Core Program Partners.   Partner coordination is stymied by partner database functionality and the inability for systems to talk to each other electronically.   This webinar will provide partners an opportunity to consider some actions that can help with coordination in spite of the electronic challenges.   The win/win/win is leveraged resources, increased customer service options, and wrap-around services.   Better partner coordination should result in a more focused approach to job seekers getting and keeping a good job/career.

AGENDA

- WIOA Partner Fundamentals
- Service Access Points
- Customer Flow
  - Reception/Greeter Considerations
    - Screening Principles and Promising Practices
    - Referral Principles and Promising Practices
    - System Orientation Principles
- Local Integrated Workforce Plan Considerations
- Memorandum of Understanding Considerations
- Connecting the Dots and Next Steps

WIOA PARTNER FUNDAMENTALS

- Operate as a comprehensive, integrated and streamlined system to provide pathways to prosperity and continuously improve the quality and performance of its services to job seekers and to employers.

WIOA

Partner Relationships

WIOA
PARTNER CONSIDERATIONS

Core Program Partners

1. Adult, Dislocated Worker, Youth

2. Adult Education and Literacy

3. Wagner-Peyser

4. Vocational Rehabilitation

Required One-Stop Partners

- Adult, Dislocated Worker, Youth

- Adult Education and Literacy

- Wagner-Peyser

- Vocational Rehabilitation

- Career and Technical Education

- Title V Older Americans

WIOA

PARTNER CONSIDERATIONS

Required One-Stop Partners

- Job Corps

- Native American Programs

- Migrant Seasonal Farmworkers

- Veterans

- Youthbuild

- Trade Act

Required One-Stop Partners

- CSBG (Community Acton)

- HUD

- Unemployment Compensation

- Second Chance

- TANF (Governor can reject)

WIOA
ENHANCED PARTNERSHIPS

- In a customer-centered, business results environment partnerships must be meaningful to create ownership and buy-in.

- Seamless is the key to customer satisfaction.

- Shared goals are key to business results.

WIOA
ENHANCED PARTNERSHIPS

- Find out what you have in common.
- Find out their WIIFM's.
- Find out your WIIFM's.
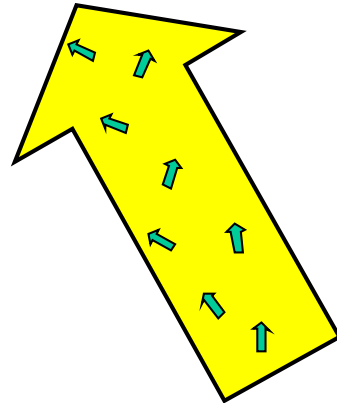
WIOA
ENHANCED PARTNERSHIPS

- Alignment in WIOA is achieved through:
  - System-wide understanding of performance goals.
  - Coordinating activities.
  - Leveraging resources.
  - Regional collaboration.
  - Career pathway strategies.
  - Sector focused strategies.
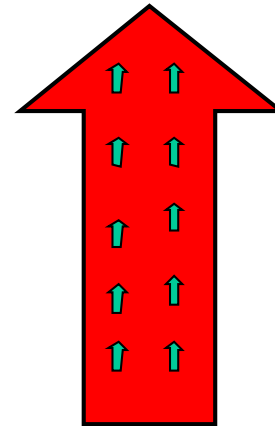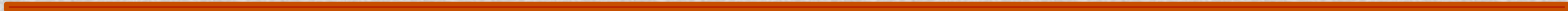
WIOA
ENHANCED PARTNERSHIPS

TRUE NORTH	TRUE NORTH
RESOURCES NOT ALIGNED ON GOALS	RESOURCES ALIGNED

Knowing Partners

WIOA
KNOWING PARTNERS

- Start with the basics.
  - Agency goals and objectives.
  - Program goals and objectives.
  - Client targeting and eligibility guidelines.
  - Services and products offered by the agency.
  - Services and products offered by the program

WIOA
KNOWING PARTNERS

- You DO NOT need to know about your partners if no cross-staffing arrangements are in place or planned. . .
  - Detailed program regulations.
  - Complete history of the agency and how its services have changed over time.
  - Benefit packages for staff.
  - Staff compensation.

WIOA
KNOWING PARTNERS

- To become "seamless".
  - Details about how customers qualify for and enter partners' programs.
  - How partner agencies define a successful outcome.
  - Types of customers a particular program or agency is particularly well equipped to help.
  - A common identifying brand.

WIOA
KNOWING PARTNERS

- Convert "program knowledge" to "system knowledge".
  - Develop a SYSTEM rather than a PROGRAM perspective.
  - Think about ways to improve the system as a whole.
  - Suggest ways to build on the particular strengths of different partners.

WIOA

- What are funding sources and funding levels?
- At what level (e.g. federal, state, local) are different program policy decisions made?
- What are the geographic service areas and region/local service delivery sites?
- What are staff positions and job descriptions?

WIOA

- Business practices influence how well services meet customer needs.

- Business practices also define agency "cultures" and shape staff comfort levels.

- Resolving differences in how agencies do business is perhaps the most difficult challenge to address.

WIOA

- What outcomes is the agency and/or program interested in furthering?
- What types of customers is the agency and/or program required or encouraged to serve?
- How specific are the program's mandates?
- What specific goals or objectives does the agency/program have?
  - How are these measured?
  - Over what period of time?

WIOA
PARTNER GOALS AND OBJECTIVES

- Understand how goals and objectives shape partners' services and the way they do business.
- Identify shared goals and objectives.
- Consider goals and objectives that are not shared.

WIOA

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- What are the eligibility requirements for qualifying for services from the agency/program?
- What additional selection criteria must be met before customers are selected to receive services?
- What is the balance between the demand for services and the available funding or service capacity of the program? Wait lists?

WIOA
SERVICES & PRODUCTS

- What different services does the program offer?
- What are the different levels of service that customers may qualify for? How are customers assigned to specific services?
- What is the content, intensity, duration of specific services.
- What are staff qualifications providing service?
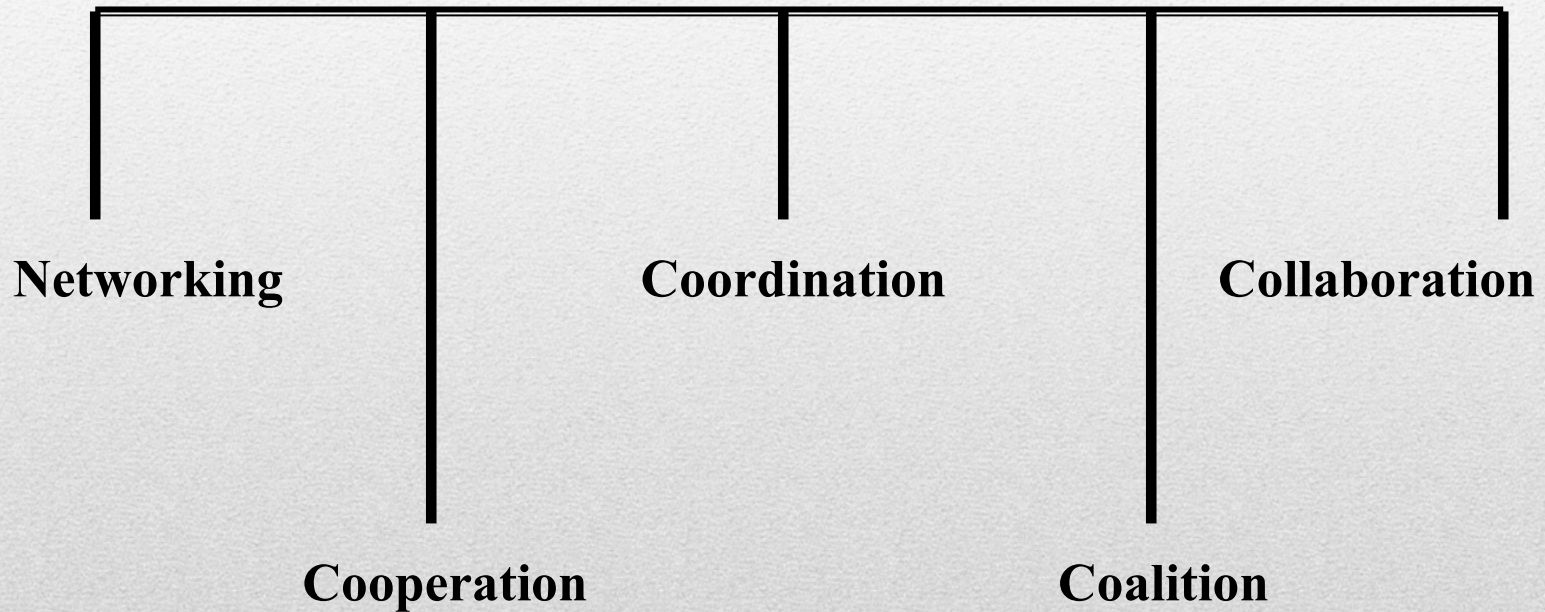
WIOA
SERVICES & PRODUCTS

- Understand what services different partners provide and how comprehensive the service menus are.

- Understand how partners differ in the type of services they offer and content, intensity, and duration.

- Identify service categories for which partners appear to offer similar, overlapping, or related services.

Partnering Models
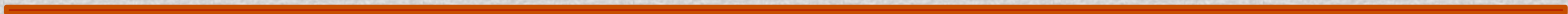
WIOA
PARTNERING MODELS

Networking   **Coordination**   **Collaboration**

          Cooperation   **Coalition**

WIOA
NETWORKING

Purpose	*Structure*	*Process*
• Dialogue and common understanding. • Information. clearinghouse. • Create base of support.	• Non-hierarchical. • Loose/flexible links. • Roles loosely defined. • Communication is primary link among members.	• Low key leadership. • Minimal decision making. • Little conflict. • Informal communication.

WIOA
COOPERATION

Purpose	*Structure*	*Process*
• Match needs. • Limit duplication of services. • Ensure tasks are done.	• Central body of people as communication hub. • Semi-formal links. • Roles somewhat defined. • Links are advisory. • Little or no new financial resources.	• Facilitative leaders. • Complex decision-making. • Some conflict. • Formal communication within the central group.

WIOA
COORDINATION

Purpose	*Structure*	*Process*
• Share resources to address common issues. • Merge resource base to create something new.	• Central body of people consists of decision makers. • Roles defined. • Links formalized. • Group leverages/ raises money.	• Autonomous leadership but focus is on issue. • Group decision making in central and subgroups. • Communication is frequent and clear.

WIOA
COALITION

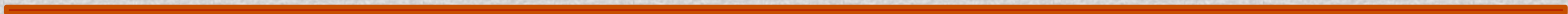| *Purpose*	*Structure*	*Process*
• Share ideas and be willing to pull resources from existing systems. • Develop commitment for a minimum of three years.	• All members involved in decision making. • Roles and time defined. • Links formal with written agreement. • Group develops new resources and joint budget.	• Shared leadership. • Decision making formal with all members. • Communication is common and prioritized.

WIOA
COLLABORATION

Purpose	Structure	Process
• Achieve a shared vision. • Build interdependent system to address issues.	• Shared decision making. • Consensus used. • Roles defined. • Links are formal. • Resources and joint budgets are developed.	• High trust. • Ideas and decisions are equally shared. • Communication system is highly developed.

Networking

Informal information sharing

Cooperation

Coordination

Links

Collaboration

Integrated career planning

Coalition
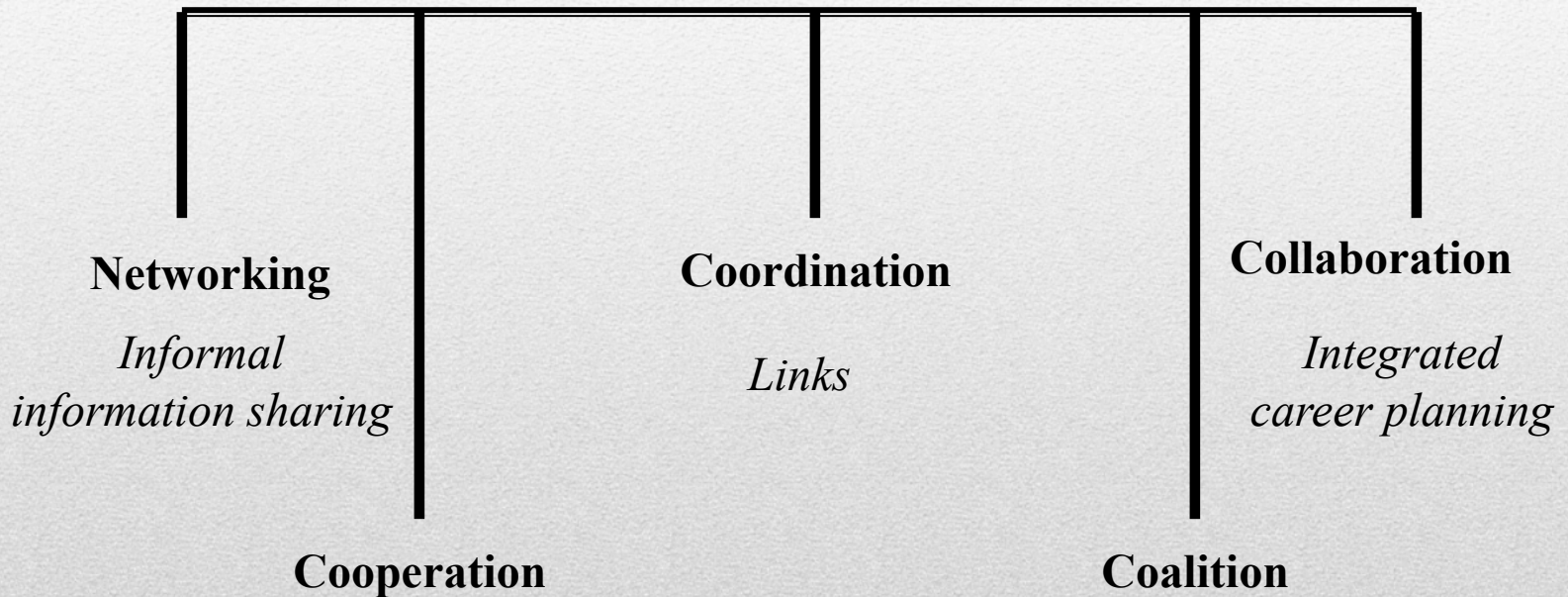
Collaboration

WIOA
COLLABORATION

- Is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve a common vision or common goals.

WIOA
COLLABORATION

- Mutual respect and trust.
- Mutual understanding of goals/vision.
- Appropriate cross-section of participation.
- All members see it as in their self-interest.
- Members share a stake in process and outcome.
- Open and regular communications.
- Ability to compromise.
- Develop clear roles and policy guidelines.

WIOA

COLLABORATION

- Attainable goals and objectives.
- Shared resources.
- Flexibility.
- Adaptability.
- Balanced attention to short-term and long-term goals.
- Ability of partners to document and take credit (individually and collectively) for accomplishments of the partnership.

WIOA
COLLABORATION

- Examples of collaborative opportunities:
  - Outreach/Marketing/Branding.
  - Greeting/Information Desk.
  - Intake.
  - Referral.
  - Assessment.
  - Job Development.
  - Business Development.
  - Workshops.

SERVICE ACCESS POINTS

Customer Flow

- Access starts with outreach and recruitment.
  - Social media
  - Website
  - Flyers
  - Customer Referrals
  - Newsletter
  - Advertisements
  - Public Speaking
  - News Articles

Customer Flow

- Why People Access the Workforce System
  - Money Crisis
  - Basic Needs
  - Work
  - Career

- Typical Request
  - "I need a job"

Customer Flow

- Access Points
  - Telephone
  - Internet
  - One-Stop Center
  - Partner Agency

CUSTOMER FLOW

Customer Flow

What is It?

Customer Flow provides the steps an individual goes through to access, understand, and utilize employment and training resources

Screening/Referral/Orientation
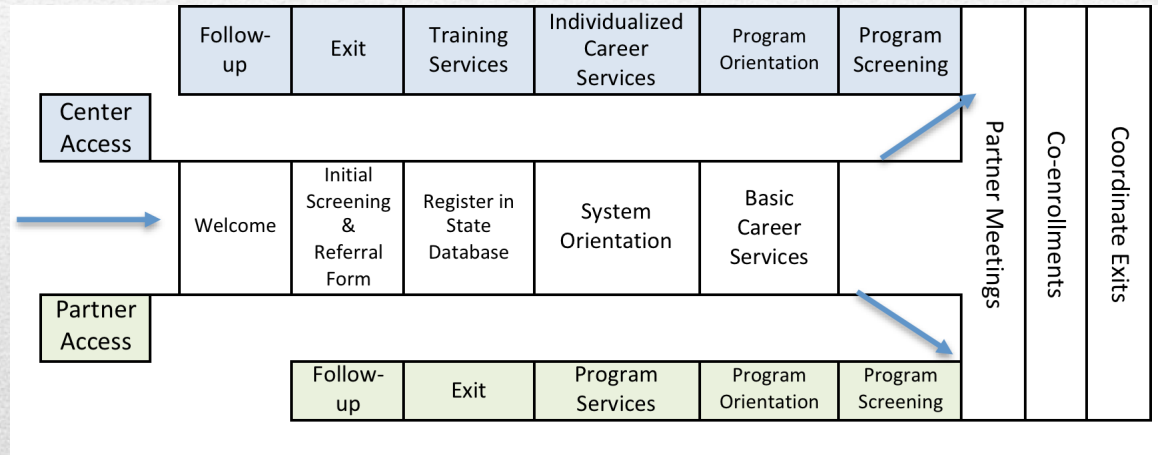
WIOA

- Greet Customer
- Conduct an Initial Screening
  - Target Population / Priority of Service Status
  - Work Ready / Self-Directed Job Search
  - Work Ready in Need of Training or Retraining
  - Needs Soft Skills and Ready to Work Skills
  - Needs Barriers Addressed
- Provide System Orientation
- Register in State Workforce System
- Connect with Service/Referrals

- Acknowledge
- Make individuals feel comfortable
- Be respectful
- Reduce the bureaucracy
- Treat individuals like YOU would want to be treated

Greet Customer

- Chat/Survey
  - Goal is to identify appropriate starting point.
  - Ask questions to establish target population and first course of action
    - Working now?
    - Last job?
    - Want to return to previous work experience?
    - High school graduate?
    - Disability?
    - Veteran?
    - Basic Needs/Money Crisis/Work/Career?

Conduct Initial Screening

- An approach that focuses on an initial "sorting" of customers and allocation of resources according to the customer's desire or need for a specific activity/service and method of service delivery.

Triage

Triage

- Workforce System Goal:
  - Provide customer quicker, more directed initial assessment, thus moving him/her in an appropriate direction as quickly as possible.

- Initial Screening:
  - Why you are here.
  - What you want.
  - What you need.

Triage

- Target Population/Priority of Service?
  - Is this an individual that should be referred to Vocational Rehabilitation, Adult Education and Literacy, Adult/Dislocated Worker/Youth, Wagner-Peyser Labor Exchange, or other partner services
  - Is this individual potentially low-income?

Conduct Initial Screening

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- Work Ready / Self Directed Job Search?
  - Is he or she working now?
  - Is the job a livable wage job?
  - Is the current or previous job in one of your local area's in-demand occupations?
  - Does the individual have an appearance that supports the job they are looking for?

Conduct Initial Screening

- Work Ready in Need of Training or Retraining?
  - Does the individual need to get on a career path?
  - Does the individual have work history but needs additional skills to improve pay and job responsibilities?
  - Is the individual possibly low-income or have other barriers for qualifying for targeted services?

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Conduct Initial
Screening
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- Needs Soft Skills and Ready to Work Skills?

  - Does the individual lack in work experience?

  - Why did he or she leave the last job?

  - Does appearance or speech make you think he or she may need soft skills or ready to work skills?

  - Observe customer characteristics, behaviors indicating need for special services.

Conduct Initial Screening

- Needs Barriers Addressed?
  - Does the individual have a money crisis?
  - Does the individual have basic needs of food/shelter/clothing?

Conduct Initial Screening

- System Orientation
  - Explain array of services and customer options.
  - Assist in discussing options and determining appropriate next step with customer.

Provide System Orientation

- Verbal

- Brochures

- PowerPoint Looped Presentation

- Center Tour

Provide System Orientation

- Have individual complete registration

Register in System

- Target Population / Priority of Service Status
  - Referral Completed to Vocational Rehabilitation or Adult Education and Literacy or Veterans Programs
  - Determine Basic Career Services that Should Be Provided Immediately

Connect with Service

- Work Ready
  - Refer to Resource Room for Self-Directed Job Search
  - Resume Preparation

Connect with Service

- Work Ready in Need of Training or Retraining
  - Refer to Career Planner
  - Conduct Initial Assessment
  - Do Eligibility Determination
  - Create Individual Employment Plan
  - Determine if Other Partner Services May Be Needed
  - Work the Plan

Connect with Service

- Need Soft Skills and Ready to Work Skills
  - Refer to Resource Room for Basic Career Services
  - Refer to Career Planner
  - Conduct Initial Assessment
  - Do Eligibility Determination
  - Create Individual Employment Plan
  - Determine if Other Partner Services May Be Needed
  - Work the Plan

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Connect with Service
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- Needs Barriers Addressed
  - Determine if Other Partner Services May Be Needed
  - Refer to Core Program Partner or Required Partner or Community-Based Organization

Connect with Service

- At any point in the process, staff and/or partners may redirect the customer if comprehensive assessments and other factors indicate and support a different course of action.

Connect with Service

INTEGRATED PLANNING

Integrated Planning

Small Group Assignments

- Break into 4 groups – if possible have each core partner represented in each group:
  - Initial Screening
  - System Orientation
  - Referral Process
  - Basic Career Services

Integrated Planning

Small Group Assignments

- Based on customer flow diagram and language in the customer flow handout, each group will complete the exercise assigned.
- Choose a recorder.
- Choose a reporter.

Integrated Planning
Initial Screening

- Assignment:
  - Initial Screening: considering that all of the core program partners must provide integrated services it is important the initial screening is fast and efficient and gathers enough information to determine if an individual is _potentially eligible_ for one of the core program partners.
  - Small group should brainstorm questions that should be/can be asked to determine if individual is potential client to any core program partner.

Integrated Planning
System Orientation

- Assignment:
    - System Orientation: considering that all of the core program partners must provide integrated services it is important a workforce system orientation be available at each access point.
    - Small group should brainstorm what should be included in the system orientation video/PowerPoint.

Integrated Planning

Referral Process

- Assignment:
    - Referral Process: considering that all of the core program partners must provide integrated services it is important a procedure is in place for referrals back and forth.
    - Small group should brainstorm the steps for each core partner related to referrals in and out. Consider Vocational Rehabilitation on-line appointment system for them and then what works for the other core program partners.

Integrated Planning

Basic Career Services

- Assignment:
    - Basic Career Services: considering that all of the core program partners must provide integrated services please list each of the basic career services each core program partner can provide to their targeted population at their access point.
    - Small group should discuss what basic career services each partner can offer and which ones they will refer out to the American Job Center.
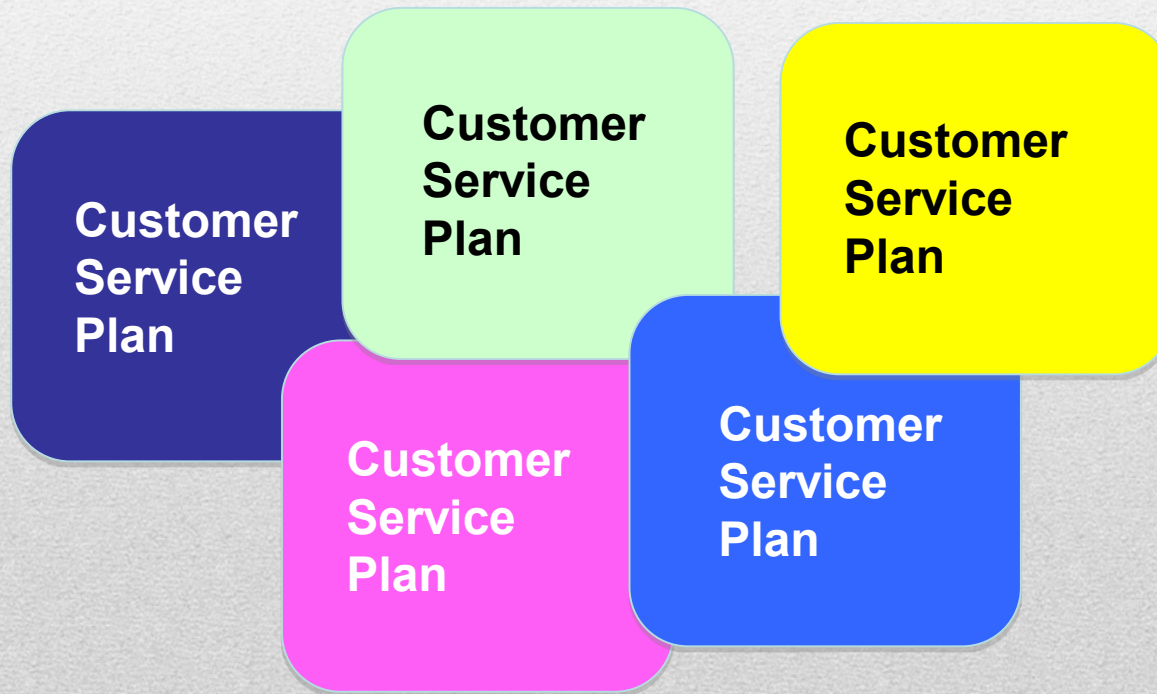   - This can be done with a service mapping exercise described on the next few slides.

Service Mapping

- Each partner gets "coded" post-it notes.
  - Different colors.
  - Symbols.
  - Abbreviations on edge.
- Distribute list of services and products possibilities.

- Each partner should write each of the products and/or services his/her source does – ONE PER POST IT NOTE. *(Please be sure partner is using his/her coded post-it notes)*

Mapping

- Conduct an affinity diagram process:
  - All the partners put post-it notes on the wall.
  - Cluster LIKE services.

Customer Service Plan

Customer Service Plan

Customer Service Plan

Customer Service Plan

Customer Service Plan

Mapping

- Cluster LIKE services.
  - Identify which services have several providers.
  - Identify which services have one, or a few providers.
  - Identify which services no one does.

Mapping

- Transcribe affinity diagram information onto a spreadsheet.

Funding Source	Screening	Recruitment
Wagner Peyser	x	
Voc Rehab		x
Kelly Temp Svs	x	x
WIOA Adult	x	x
WIOA Dislocated Worker	x	x
Adult Education		
Goodwill	x	x

Mapping

- Create product line work groups from the service map

- Have partners in each "cluster" get together for discussions related to the service.

- Each cluster becomes a product line.

Mapping

- Each work group shares information.
- Discuss what each partner MEANS when they say they provide this service.
    - Target population?
    - Eligibility requirements?
    - Length of service?
    - Depth of service?

    - Expected outcome?

Mapping

- Create Common Definitions
  - Consider all the descriptions by each partner.
  - Peel away any mention of target groups, funding streams, and acronyms.
  - Each person write down individually the definition they heard across all the descriptions if they took out anything about characteristics of the funding source or target populations.
  - Share individual definitions.
  - Pick the most appropriate that is cross-cutting.

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- Create Common Measures Plus
  - Go around the table and find out what each partner must do for their investors related to the product line to stay in business.
  - List the measures required.
  - Are any similar?
  - Jot down the success indicator such as job.
  - Discuss how each individual can help with all the goals listed.

MEMORANDUM OF UNDERSTANDING

- The Memorandum of Understanding is the formal document that provides the official decisions on screening, referrals, and the system orientation.

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Developed by…

Workforce System Certifications

- Business Services Certification
- Advanced Business Services Certification
- Leadership Development Certification
- Communication and Presentation Certification
- Career Planning and Development Certification
- Soft Skills Certification (48 modules) – also available in a train-the-trainer format
- Re-entry Services Certification
- Youth Services Certification
- WIOA Operations Certification