

COORDINATING INTAKE WHEN DATA SYSTEMS DON'T TALK TO EACH OTHER

November 6, 2019

- Title:** Coordinating Intake When Data Systems Don't Talk To Each Other
- Purpose:** Introduce Partners to Concepts to Assist in Providing a Seamless Service
- 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/ Tasks:

- 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
 - November/December meeting will focus on system orientation.

Mary Ann Lawrence Bio

Motivational Speaker, Author, Trainer, Facilitator,
Colleague



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Mary Ann Lawrence is the CEO of PowerNotes, LLC. Mary Ann has extensive experience in workforce development with over 40 years at the local, state, and national levels of the system in leadership positions. Mary Ann was appointed by the Secretary of Commerce and served on the Board of Examiners for the Malcolm Baldrige Quality Award responsible for reviewing and selecting award recipients for high-performing businesses.

Mary Ann has worked to train and provide technical assistance to U.S. Department of Labor employees in continuous improvement efforts at both the national level and regional offices. Mary Ann played a significant role in the initial design and delivery of USDOL One Stop Training including linking the work done from State to State related to occupational learning objectives for staff working in the one stop environment. Mary Ann serves as an executive coach in helping the workforce system and executives develop and enhance strategies for successful Workforce Innovation and Opportunity Act deployment.

Mary Ann has a Business Administration Degree and is also certified in Task Analysis and Curriculum Design. She has extensive experience in non-profit leadership having been the Executive Director of a central Indiana Workforce Investment Board and the Executive Director of the Maryland Institute for Employment and Training Professionals. She has been recognized nationally with the Professional Development Award from the National Association of Workforce Development Professionals. She serves on the National

Association of Workforce Professionals Board of Directors and is currently Chair for the third term. Mary Ann served for two years as a member of an advisory council, Professional Workforce Development Panel, established to advise the Department of Labor on capacity building issues system-wide. During her two-year term Mary Ann served as a member of the Panel's executive team. Mary Ann has eight staff certifications that are web-based and/or classroom-based to assist with the WIOA required staff certifications including Job Seeker Services Certification, Business Services Certification, Advanced Business Services Certification, Leadership Development Certification, Re-entry/Ex-offender Services Certification, Communication and Presentation Skills Certification, Career Planning and Development Certification, and WIOA Fundamentals Certification. And, MaryAnn has Youth Life Skills Certification, Adult/Dislocated Worker Job Readiness Certification, and Youth Work Readiness Certifications that are all web-based.

In addition to executive leadership coaching, Mary Ann has extensive experience in non-profit board development, volunteerism systems, and fund development activities. Mary Ann is a Certified Fund Raising Executive and has managed successful non-profit events, mass marketing, and capital campaigns. Mary Ann does both Board and staff training in a vast array of subjects. Mary Ann specializes in strategic planning, grant writing, business plan development, marketing plans, partner coordination, policy development, organizational development, team building, balanced scorecard creation, board development, procurement, mystery shopping of one-stops, fee-for-service activities, business services, integrated service design, chartering and certification of workforce systems, and third party organizational evaluations. She facilitates planning for a variety of groups including welfare reform, school-to-work, vocational rehabilitation, community based organizations, economic development, adult education, educational institutions and one-stops. Mary Ann has been active in helping Local and State Workforce Development Boards establish the reengineering needed at each level to successfully administer, manage, and operate all functions within the workforce development system and its partners. MaryAnn conducts program and fiscal monitoring of local agencies engaged in Workforce Innovation and Opportunity Act functions.

Currently, Mary Ann is coaching and guiding States and Local Workforce Areas and partner agencies on the implementation of WIOA and the transition from WIA to WIOA.

Mary Ann puts "fun" in organizational development and a dash of humor in reengineering!

PARTNER FUNDAMENTALS

- Workforce Innovation and Opportunity Act partners 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.

PARTNER RELATIONSHIPS

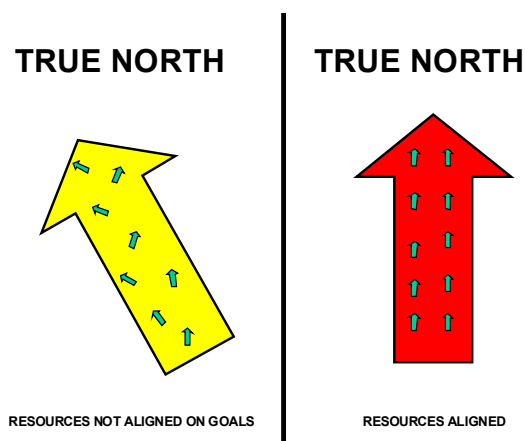
Core Program Partners

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
 - 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 or have as required or have as a core partner)
- 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.

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- Find out what you have in common.
 - Find out their WIIFM's.
 - Find out your WIIFM's.
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- Alignment in WIOA is achieved through:
 - System-wide understanding of performance goals.
 - Coordinating activities.
 - Leveraging resources.
 - Regional collaboration.
 - Career pathway strategies.
 - Sector focused strategies.



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

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- 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.

 - 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.

 - 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.

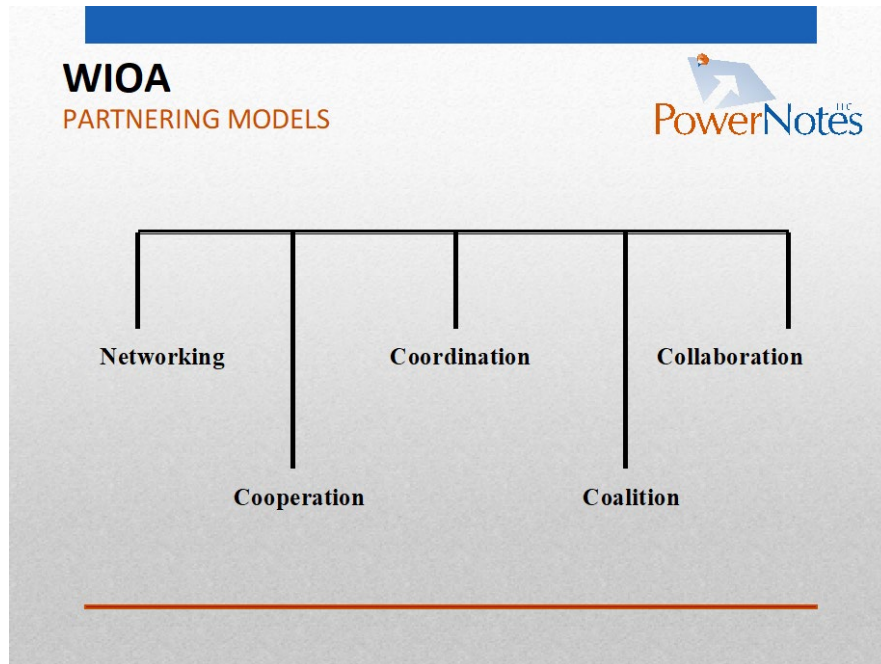
 - How an agency does business.
 - What are funding sources and funding levels?
 - At what level (e.g. federal, state, local) are different program policy decisions made?
 - What are the geographic service areas and region/local service delivery sites?
 - What are staff positions and job descriptions?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

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- 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.


 - Partner customer eligibility and targeting.
 - 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?
 - Understand how agency determines who is an appropriate or high priority customer.
 - Identify shared customers.
 - Identify distinctions between customer target groups.

 - Services and 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?
 - 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
NETWORKING



<i>Purpose</i>	<i>Structure</i>	<i>Process</i>
<ul style="list-style-type: none">• Dialogue and common understanding.• Information clearinghouse.• Create base of support.	<ul style="list-style-type: none">• Non-hierarchical.• Loose/flexible links.• Roles loosely defined.• Communication is primary link among members.	<ul style="list-style-type: none">• Low key leadership.• Minimal decision making.• Little conflict.• Informal communication.

WIOA
COOPERATION



<i>Purpose</i>	<i>Structure</i>	<i>Process</i>
<ul style="list-style-type: none"> • Match needs. • Limit duplication of services. • Ensure tasks are done. 	<ul style="list-style-type: none"> • Central body of people as communication hub. • Semi-formal links. • Roles somewhat defined. • Links are advisory. • Little or no new financial resources. 	<ul style="list-style-type: none"> • Facilitative leaders. • Complex decision-making. • Some conflict. • Formal communication within the central group.

WIOA
COORDINATION



<i>Purpose</i>	<i>Structure</i>	<i>Process</i>
<ul style="list-style-type: none"> • Share resources to address common issues. • Merge resource base to create something new. 	<ul style="list-style-type: none"> • Central body of people consists of decision makers. • Roles defined. • Links formalized. • Group leverages/raises money. 	<ul style="list-style-type: none"> • Autonomous leadership but focus is on issue. • Group decision making in central and subgroups. • Communication is frequent and clear.

WIOA
COALITION

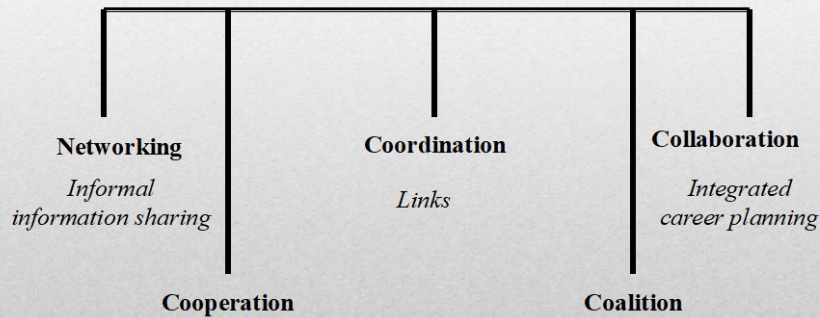


<i>Purpose</i>	<i>Structure</i>	<i>Process</i>
<ul style="list-style-type: none"> • Share ideas and be willing to pull resources from existing systems. • Develop commitment for a minimum of three years. 	<ul style="list-style-type: none"> • All members involved in decision making. • Roles and time defined. • Links formal with written agreement. • Group develops new resources and joint budget. 	<ul style="list-style-type: none"> • Shared leadership. • Decision making formal with all members. • Communication is common and prioritized.

WIOA
COLLABORATION



<i>Purpose</i>	<i>Structure</i>	<i>Process</i>
<ul style="list-style-type: none"> • Achieve a shared vision. • Build interdependent system to address issues. 	<ul style="list-style-type: none"> • Shared decision making. • Consensus used. • Roles defined. • Links are formal. • Resources and joint budgets are developed. 	<ul style="list-style-type: none"> • High trust. • Ideas and decisions are equally shared. • Communication system is highly developed.



COLLABORATION

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

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

SERVICE ACCESS POINTS

- Access starts with outreach and recruitment.

Social media

Website

Flyers

Customer Referrals

Newsletter

Advertisements

Public Speaking

News Articles

- Why People Access the Workforce System

Money Crisis

Basic Needs

Work

Career

- Typical Request

“I need a job”

- Access Points

Telephone

Internet

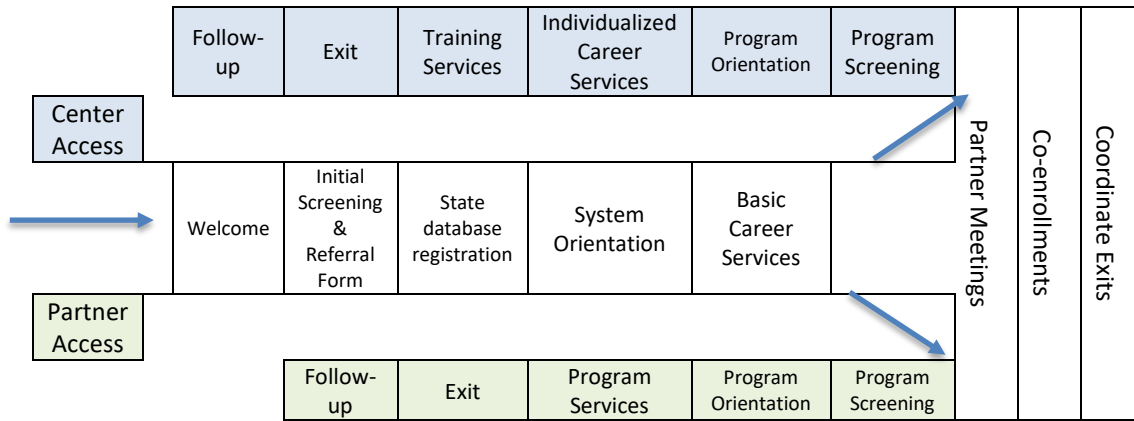
One-Stop Center

Partner Agency

CUSTOMER FLOW

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

SCREENING/REFERRAL/ORIENTATION



Jobseekers, youth, and workers may access the workforce system at the comprehensive American Job Center, a satellite American Job Center, a mobile American Job Center, Vocational Rehabilitation, Department of Social Services, or Adult Education and Literacy. A “no-wrong door” approach agreed upon by the partner agencies provides common steps regardless of the access point. The partners are establishing an initial screening tool that is comprised of some basic questions that provide an indication of whether the individual may be a potential candidate for another Core Program Partner. If the initial screening identifies a potential partner referral may be helpful, the referral process negotiated by each partner agency is triggered. Everyone entering each of the access points will then be provided a computer to register in the State database. The partner-convening group should create a system orientation that will be technology-based and individuals will watch the PowerPoint. The system orientation will provide information on the diverse array of options that may be available. Next, basic career services may be provided by the Center first accessed or a partner agency or an individual may be referred to an American Job Center to utilize the resource room if access is somewhere other than an American Job Center. Next, program screening is conducted by the respective partner including assessments, and the individual is given the unique program orientation for the services he or she will be enrolled in. Funding streams provide appropriate program services.

Front Desk Services/Welcome Team

- Greet Customer

Acknowledge

Make individuals feel comfortable

Be respectful

Reduce the bureaucracy

Treat individuals like YOU would want to be treated

- 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

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?

Triage

- 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.
- 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.

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?

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?

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?

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.

Needs Barriers Addressed?

- Does the individual have a money crisis?
- Does the individual have basic needs of food/shelter/clothing?
- Provide System Orientation

Explain array of services and customer options.

Assist in discussing options and determining appropriate next step with customer.

Verbal

Brochures

PowerPoint Looped Presentation

Center Tour

- Register in State Workforce System
- Connect with Service/Referrals

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

Work Ready

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

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

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

Needs Barriers Addressed

- Determine if Other Partner Services May Be Needed
- Refer to Core Program Partner or Required Partner or Community-Based Organization

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.

INTEGRATED PLANNING

- Break into 4 groups – if possible have each core partner represented in each group:

Initial Screening

System Orientation

Referral Process

Basic Career Services

- 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.

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.

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.

REFERRAL PROCESS

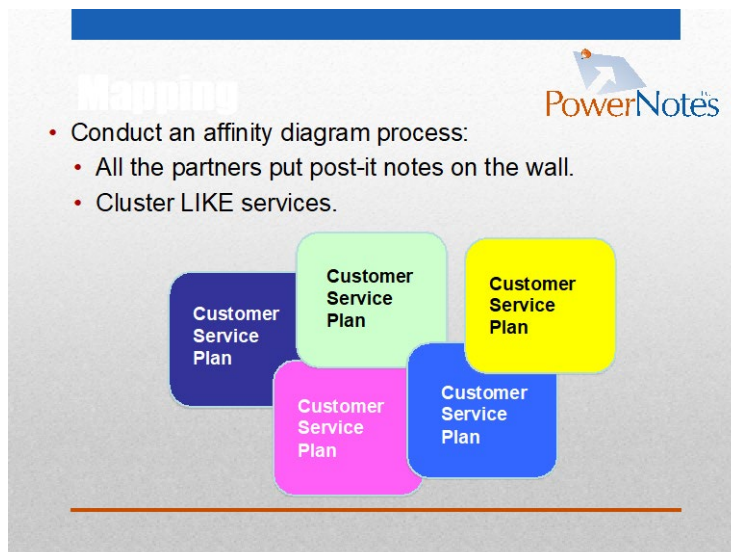
- Assignment:
 - Referral Process: considering that all of the core program partners must provide integrated services it is important a procedure is in place for referrals back and forth.
 - Small group should brainstorm the steps for each core partner related to referrals in and out. Consider Vocational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

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)*



- 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

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- 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

- 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.
- 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?
- Create Common Definitions
 - Consider all the descriptions by each partner.
 - Peel away any mention of target groups, funding streams, and acronyms.

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- 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.
 - 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.