

*Next Steps for Your*  
**Local Integrated Services  
Leadership Team**

*Today...*

- ✓ Provide ISD Updates
- ✓ Identify the Roles and Responsibilities of the Team
- ✓ Discuss the Integrated Customer Flow with Functional Staffing
- ✓ Define and Enhance the Product Box
- ✓ Plan Next Steps for Your Team to Continue to Implement ISD
- ✓ Exchange Ideas and Share Emerging and Promising Practices

## Local Integrated Services Leadership Team

### Roles:

- ✓ Build Shared Purpose and Relationships
  - ✓ Guide Local ISD Implementation
- ✓ Provide Forum for Overcoming Challenges

### Responsibilities:

- ✓ Implement Local ISD within State Framework
- ✓ Communicate ISD Plans to Stakeholders/Staff
- ✓ Involve Staff in Planning (Within Parameters)
  - ✓ Design an Integrated Customer Flow
  - ✓ Define and Enhance the Product Box
  - ✓ Develop an ISD Procedures Manual
- ✓ Create Org Chart for Each Service Location
- ✓ Name Functional and Service Location Leaders
  - ✓ Assign Staff to Functions
- ✓ Seek Alignment of Local Policies within ISD
  - ✓ Train Staff in New Functions





***Make It Real! Get in the Weeds!***  
**Produce an Integrated  
Customer Flow Procedures Manual**

***Contents...***

- Center customer flow chart
- Functions and function purpose
- Connectivity of functions
- A flow chart for each function
- Procedures for each process step
- Relevant policies for each step
- Data entry and “eligibility” by step
- Bulleted staff expectations by step

***Involve Frontline Staff in Developing  
Procedures Within the Framework***

## **Welcome Function/Team**

- ✓ Greet/Meet All New Customers (1-on-1)
- ✓ Initial Data and Registration (Updated)
- ✓ Co-Enroll At Core (Intensive?) Level
- ✓ Conduct “Initial” Assessment
- ✓ Recommend, Promote, and Schedule First Service
- ✓ Connect to Other Functions (If Needed)

## **Skills Development Function/Team**

- ✓ Staff-Assist Customers Sent by Welcome
- ✓ Skill Focus (with Employment Outcome)
- ✓ Comprehensive Skills Assessment
- ✓ Career Planning and Counseling

- ✓ Provide Easy Access to Product Box
- ✓ Continuously Engage through Service Promotion and Scheduling
- ✓ Help Their Customers in Resource Area

### **Employment Function/Team**

- ✓ Staff-Assist Customers Sent by Welcome
- ✓ Job Focus (with Skill Opportunities)
- ✓ Customized Job Search Advice
- ✓ Verify Skills to Meet Job Requirements
- ✓ Provide Easy Access to Product Box
- ✓ Continuously Engage through Service Promotion and Scheduling
- ✓ Help Their Customers in Resource Area

## Employer Services Function/Team

- ✓ Provides demand-driven alignment advice for the development of job seeking and skill products
- ✓ Engages employers in the Centers
- ✓ Populates Product Box with Employer-Based Products for and across all Centers
- ✓ Develops “dual customer” products directly connecting employers and job seekers:
  - *Job Orders Reflecting Center Talent*
  - *Pre-Hire Testing*
  - *In-Center Hiring Events*
  - *Employer-Based Training*

## Integrated Functional Leadership

Workforce Board and Partners

*Integration Framework in MOU and One-Stop Operator Agreement*



One-Stop Integrated Service Leadership Team

*Integrated Service Procedures Manual and Functional Job Descriptions*



Functional One-Stop  
Center Leader/s

*Day-to-Day Direction:  
Center Work Assignment  
Center Employee Standards*



Employer/s  
of Record

*Conditions of Employment:  
Hire, Wages, Hours, Benefits,  
Fire, Appraisal, Grievances*



Integrated One-Stop Center Functional Staff

*What Makes it Work?*

*Clarity, Consistency, Informal Power, Center Team Identity*

## ***Redeploying Center Staff to Functions***

### **Don't Bring Along Old Program Baggage**

- Go lean: Subtract, streamline, simplify!
- Each step: Have to, want to, add value?

### **Assign Staff to Functions**

- Traffic: Most customers = most staff
- Talent: What staff like to do and do well

### **Train Staff in New Functions**

- Don't train legacy "program" requires
- Train functions, service procedures, and data entry

### **Redefine Case Management and Case Load**

- Continuous Services for Continuous Engagement
- "Teamload": Next Available; Return Relationship

### **Seek Team Performance and Accountability**

- Metrics to foster working together
- Real-time input metrics leading to performance

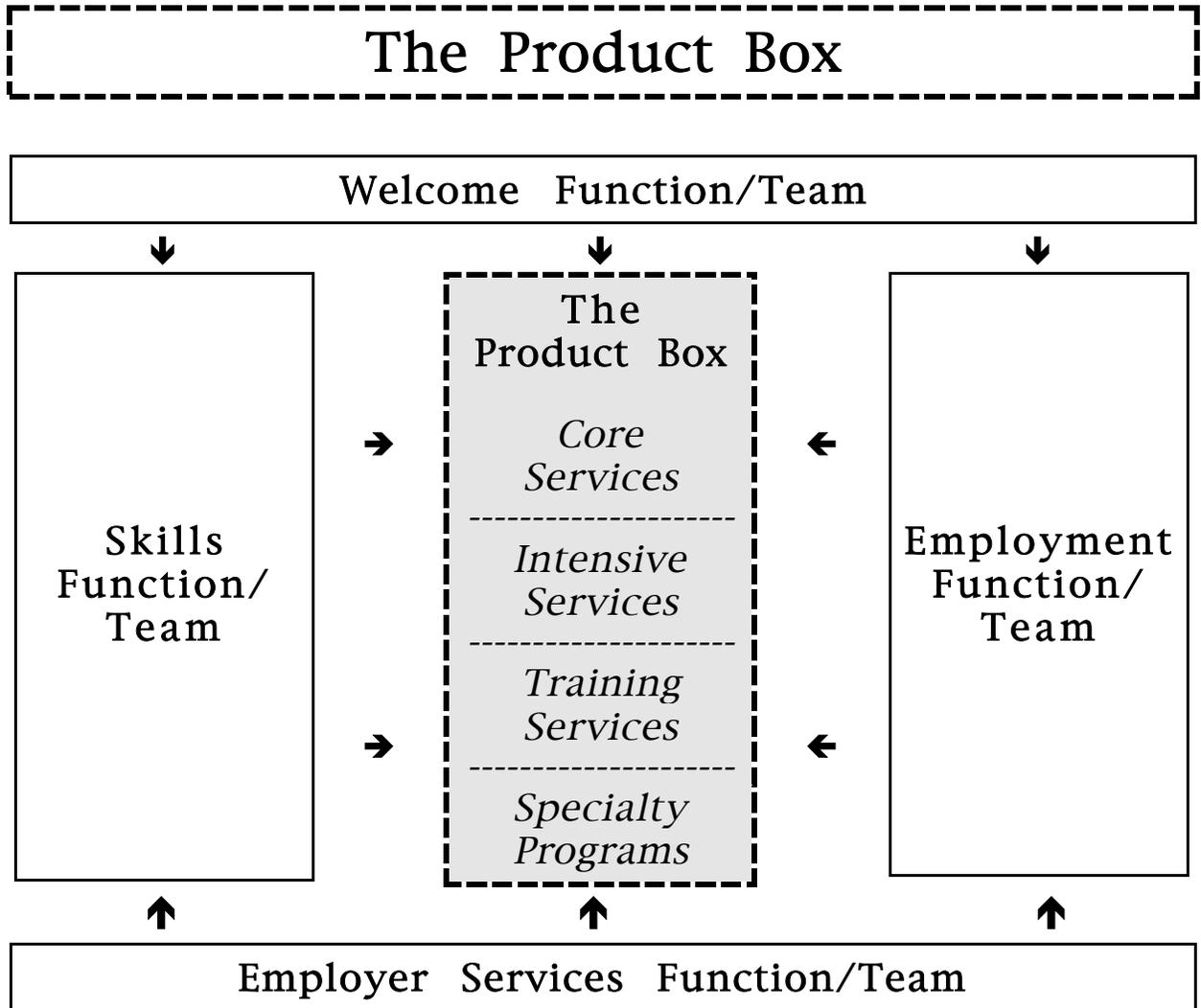
### **Focus on Functions (Not "Teams")**

- Smaller Centers: Staff have multiple functions
- Fewer Staff: Unify Skills/Employment functions

## **Deployment of Staff to Integrated Service Delivery Functions**

- Communicate “No One Loses Job Because of ISD”
- Decide Number of Locations and Staffing Levels
- Develop Job Descriptions Before Selection
- Choose an Option: Apply, Prefer, or Decide?
- Unbundle Leadership and Frontline Methods?
- Name Leaders First So They Are Involved
- Inventory Strengths and Deploy by Talent
- Seek WIA/WP Balance in Functional Assignment
- Take Care of Everyone (Ego and Salary)
- Give People a Chance to Step Up to the Plate
- Don't Have Clear Winners and Losers
- Create New, Value-Add Positions Across Centers
- Meet One-on-One First in Sensitive Cases
- Remember, Nothing is Ever Forever





- ✓ The heart: the reason for everything else
- ✓ All staff connect customers continuously through service recommendation
- ✓ Offer, promote, and schedule every visit, every customer to continuously engage

## ***Six Questions to Answer...***

- 1. Who is Responsible for the Product Box?**
- 2. What Services are Currently in Your Product Box and What Needs to Be Created or Enhanced?**
- 3. How Will the Services in the Product Box Be Resourced and Delivered?**
- 4. How Will Customers Be Connected to Product Box Services?**
- 5. How Will You Promote Your Product Box Services?**
- 6. How will You Continuously Improve the Quality of the Product Box Services, Including Your Workshops?**

## *Who is Responsible for the Product Box?*

### Product Box Responsibilities

- ✓ Ensuring Demand-Drive
- ✓ Populating and Expanding
  - ✓ Increasing Use
  - ✓ Measuring Success
  - ✓ Improving Quality

### ⚡ What Works! ⚡

- Clear Assignment
- Across Centers
- Define vs. Deliver

*What Services Are Currently  
in the Product Box? What Needs  
to Be Created or Enhanced?*

## Product Box Content Drivers

- ✓ Economic Conditions
- ✓ Workforce Intelligence
- ✓ Employer Demand
- ✓ Job Seeker Needs and Interests
- ✓ Resources Available
- ✓ Contribution to Performance



**Your Product Box:  
Continuous Responsiveness for  
Continuous Improvement**

*Customer Needs/Wants and  
Priorities for Improvement*



**Five Product Lines in Product Box**

- ① Job Getting and  
Job Readiness Services**
- ② Skill Development and  
Improvement Services**
- ③ Occupational Training Services**
- ④ Employer-Sponsored Services**
- ⑤ Specialty Program Services**



*Economic Conditions and  
Labor Market Realities*

## Job Getting and Job Readiness Services Product Line

- ✓ Job Finding Skills
- ✓ Resume, Interviewing, Online
  - ✓ Job Loss Skills
  - ✓ Job Clubs
- ✓ Job Keeping Skills
- ✓ Employer Panels and Presentations
- ✓ Networking Opportunities

### *Continuous Improvement*

- *Most Frequent Jobs*
- *Local Employer Practices*
- *Listing Requirements*
- *Job Seeker Feedback*

**Skill Development and  
Skill Improvement Services  
Product Line**

*Intensive, Short-Term  
Pre-Vocational Services*

*The enhancement of existing skills and development of new skills to make job seekers more qualified to be hired and more competent on the job after hired*

⚡ Major Priority for  
Expansion and Enhancement

⚡ Unlimited Potential and Possibilities

⚡ What Employers Most Want Us to Do

⚡ Key to Transforming  
Job Seekers into Job Candidates

**Make Entry Into Intensive Easier!**  
***Make Core/Intensive Seamless!***

***WIA Dislocated Workers***

**Needs Intensive:**

*“unable to obtain employment...  
requires more intensive services*

***WIA Adult Law and Regulations***

**“If funds for adult employment and training activities are limited, priority for adult-funded intensive and training services must be given to recipients of public assistance and low-income individuals.”**

***Boards Decide, “If Funds Limited”***

**? Limited for Training, Not Intensive ?**

**? Priority: Does It Mean Everyone ?**

**? Limited If Expend Direct Dollars ?**

## Basic Skills

- ✓ Skill Brush-Up for Pre-Employment Testing
- ✓ GED Tutoring and Prep
- ✓ NCRC Prep and KeyTrain
- ✓ Basic Computer and Online Skills

## Cross-Industry and Cross-Occupational Skills

- ✓ Computer Applications (Excel, WORD, CAD, PPT)
- ✓ Customer Service
- ✓ Words-for-Work and Rosetta Stone
- ✓ Working in Teams

## Key Sector Skills

✓ CPR

✓ Inventory

✓ Food Safety

✓ Cash Register Basics

## Skill Verification and Credentialing Opportunities

✓ GED Attainment

✓ NCRC Attainment

✓ WorkKeys

✓ Manufacturing Certification

✓ OSHA

## Occupational Training Services Product Line

- ✓ Planning a New Career Workshop
- ✓ Finding Money for School Workshop
- ✓ Assistance in Completing FAFSA
- ✓ Individual Training Accounts
  - ✓ Pre-Training
  - Basic Skills Brush-Up
- ✓ Study Skills and Study Groups
- ✓ Tutoring

⚡ *Promising Practice* ⚡

*Facilitate Entry into Occupational  
Training Whether WIA Funded or Not*

## Employer-Sponsored Services Product Line

✓ Skill-Based Internships and  
Work Experience Opportunities

✓ OJT and  
Customized Training Opportunities

✓ Customized, In-Center  
Recruitment Events

✓ Job Orders Reflecting  
Center Talent Inventory

✓ Pre-Hire Testing

⚡ *Define Priorities* ⚡

*Top Priority for the  
Employer Services Team is to Populate  
the Product Box with These Services*

## Specialty Program Services Product Line

- ✓ WIA Title I Youth
  - ✓ Vets
  - ✓ Trade and REA
  - ✓ TANF and FSET
- ✓ Vocational Rehabilitation/Adult Ed

### ⚡ *Role of Specialty Programs* ⚡

*In a Center with Integrated Services  
Delivery, WP and WIA Adult Staff the  
Integrated Customer Flow*

*Specialty Programs for Targeted  
Populations Receive Seamless Referrals  
from the Flow and Specialty Programs  
Help Their Customers  
Seamlessly Access Other Needed  
Product Box Services*

*Referral From Universal Customer Flow*

*Co-Enrollment in WP/WIA Ad/DW*

*Data Follows Customer*



*The Product Box:*

*Other Product Box Services*

*Seamless Access to Universal Services*



*Specialty Programs with Specialty Services for Targeted Populations*

*Co-Enrollment Where Eligible, Easy*

*Streamlined Program Requirements*

*Welcome Function*



*Targeted Outreach and Invitation*

*How Will Services in the Product Box  
Be Resourced and Delivered?*

**Resourced:**

- ✓ Center Staff (or Circuit-Riders)
- ✓ Volunteers and/or Peers
- ✓ Partner Agreement w/Seamless Referral
- ✓ WIA “Intensive” Procured/Contracted
- ✓ Purchase of Slots (Intensive “ITAs”)
- ✓ Web-Based, No-Cost Content

**Delivered:**

- ✓ At the Center
- ✓ At Community (or Partner) Locations
- ✓ At Home or Center Online

*Promising Practices:*

- ✦ *More Training Rooms and Laptops*
- ✦ *Facilitated, Onsite, Blended E-Learning*

## What are the Product Box Success Indicators?

### ? Quantity of Use

- Number and Percentage
- More than One, Frequency of Use

### ? Conversion Ratios

- First Visit/First Product Box Service”
- First Service/Second Service

### ? Customer Feedback and Satisfaction

- Qualitative (Opinion)
- Quantitative (Behavior)

### ? Contribution to Performance

- Common Measures
- State and Board-Defined Measures



## Local Leadership Team Integrated Services Planning

Activity	Who/How	Date
1. Form Integrated Services Leadership Team to Develop Local Integrated Services Plan		
2. Adopt a Local Integrated Service Framework		
3. Define Roles and Responsibilities of WIB, WIB Staff, Area Managers, Partners, and Title I Service Providers in ISD		
4. Decide Which Partners Staff Universal Flow and Which Partners Are In the Product Box		
5. Set a Realistic Launch Date		

6. Schedule Detailed Activities to Launch		
7. Develop a Communication Strategy to Keep All Staff Informed and Involved in Process		
8. Collect and Analyze Data Informing Integrated Customer Flow and Staffing		
9. Identify Integration Success Indicators		
10. Negotiate Integrated, Common Measures Performance Standards		
11. Decide Number of Service Locations		
12. Map an Integrated Customer Flow with Key Service Functions and Function Connectivity		

13. Inventory Current Policy and Procedures to Assess Alignment with New Customer Flow		
14. Rescind Existing Policy and Procedural Barriers to Implementing the Flow		
15. Create New Integrated Service Policies to Support Flow		
16. Define, Populate, Resource the Product Box		
17. Determine Functions Center-Based and Cross-Center		
18. Develop Center Functional Organizational Chart and Number of Staff to be Deployed By Function in Each Service Location		

19. Define Functional Leadership		
20. Write Functional Job Descriptions		
21. Decide How to Identify and Deploy Staff to Functions and Locations		
22. Select Center and Service Location Leaders		
23. Name Functional Team Leaders in Larger Centers		
24. Assign Staff to Function and Location		
25. Convene Staff by Function to Plan Implementation		
26. Develop Center and Functional Operational Procedures Manual with Frontline Involvement		

27. Embed Framework, Flow, Organizational Chart, and Procedures into MOU, Operator Agreement, Procurement, Contracts, and Local Plan		
28. Decide Transition Strategy Until Launch		
29. Redesign Space and Ensure Needed Tools		
30. Train Staff on Data Entry by Function and Procedural Step		
31. Conduct “Dress Rehearsal/s”		
32. Plan First Month Support Strategy		
33. Celebrate and Launch		
34. Continuously Improve		

*Summary and Next Steps...*

*Attached: A Framework for Re-Engineering  
North Carolina's Workforce Delivery System*

## **A Framework for Re-Engineering North Carolina's Workforce Delivery System**

*Today's environment requires North Carolina's workforce delivery system to change the way it provides services to its citizens and businesses. Four specific events over the last several years have led to this need to change.*

- *North Carolina's economy is transitioning. The recession of 2008-09 in combination with the structural changes to the state's economy has resulted in high unemployment (the 5<sup>th</sup> highest in the country). Despite the high unemployment, some businesses are struggling to find skilled workers.*
- *The Department of Commerce and Employment Security Commission merged creating an opportunity to coordinate local workforce service delivery.*
- *The Commission on Workforce Development recognized the need to rethink service delivery and included in its 2012-14 Strategic Plan an objective to create a new framework for a more integrated one-stop delivery system.*
- *Governor McCrory has stated that customer service is a priority for all state services.*

*The convergence of these four events requires North Carolina's Career Centers to operate in a new way by integrating workforce services. Integrated service delivery will better serve the state's citizens and businesses by responding to customer needs, not just program requirements. It will create a seamless delivery system and improve customer service. Integrated service delivery will assist people access the services they need to get back to work and help businesses connect with qualified workers. The North Carolina Division of Workforce Solutions looks forward to continuing to work with local Workforce Development Boards, stakeholders, and partners to move our delivery system forward.*

The following Strategic Framework for North Carolina's Career Centers will be implemented with the commitment and urgency that the economy demands and our customers deserve. This new approach to service delivery is characterized by:

- An integrated customer pool
- An integrated customer flow
- Integrated Career Center staffing
- Integrated technology

### **Integrated Services to Better Serve Customers**

- North Carolina's Career Centers must move beyond mere partnership and co-location and transform to true integrated service delivery. While all Career Center partner programs are valued, Workforce Investment Act (WIA) Title I Adult and Dislocated Worker programs and the Wagner-Peyser Employment Services program are the operational backbone of the Centers. Consequently, these programs will be the initial focus of a customer-focused, skill-based, integrated service strategy.
- An integrated customer flow will be developed and implemented that responds to customer need – not just to program requirements. Staff-assisted services will be emphasized and Center services will be continuously promoted and provided until the customer's goal has been achieved. This integrated flow will include three major functions that comprise the customer welcome, skill development, and employment activities.
- These customer flow functions will be fulfilled by integrated, cross-trained staff with functional leadership. The integrated, functional teams will include both Wagner-Peyser and WIA Title I Adult and Dislocated Worker funded employees and the focus will be on the assigned function – not just the requirements of a particular funding stream.
- Another very important functional team will provide services to employers that will both assist in the alignment of Center services with the needs of employers, as well as develop employment opportunities for Center jobseeker customers. This team may operate on a regional labor market basis, but will be a valuable asset to each Center in the area.
- All Career Center customers (when eligibility permits) will be enrolled in the performance pool of both the WIA Title I Adult program and Wagner-Peyser program during the first visit to a Career Center. All Trade Act customers will also be enrolled in the performance pool of the WIA Title I Dislocated Worker Program.
- The North Carolina Division of Workforce Solutions will integrate its own staff and shift from a program silo organization to an integrated services organization. The Division expects that local Workforce Development Boards and Career Centers will adopt the same approach.

**Create a Career Center Service Model that Values Both Skills and Jobs**

- All Career Center customers, including Unemployment Insurance claimants, will be provided with the opportunity to know their skills, improve their skills, and get the best job possible with their skills. Every jobseeker that enters the Career Center will leave as a better job candidate because of the value-added services received.
- The Career Center customer flow will include a first-visit, standardized initial skills assessment, easy access to a wide range of skill development services, and the opportunity to improve employment opportunities through skill upgrading, skill validation, and credentialing.

**Increase the Number of Career Center Customers  
Accessing Skill Development and Training Services**

- North Carolina's Career Centers will develop, continuously improve, and actively promote a wide range of skill development opportunities through multiple service delivery methods. All services in this robust "product box" will be available to all Center customers, embedded in an integrated customer flow, and easily accessed by eligible customers with the support of all Center staff. Local Workforce Boards are very strongly encouraged to invest and dedicate more of their valuable resources to pre-vocational skill improvement intensive services.

**Implement Lean Processes and Streamline Service Delivery by  
Removing Bureaucratic Barriers and Waste**

- In order to better serve customers, reserve staff time for value-added service delivery, and make integrated services a reality, the North Carolina Division of Workforce Solutions will actively work to streamline requirements and alleviate bureaucratic barriers to support the delivery of customer-focused quality service. The Division will remove unneeded paperwork, reduce unnecessary documentation and reporting, change outdated policies that inhibit integrated and efficient service delivery and provide modern technology to accommodate integrated service delivery.
- The Division will focus its monitoring on quality service delivery and with "compliance" as a necessary responsibility, but not as an end in itself.

Local Workforce Boards will be expected to respond to this continuous, state-level streamlining, by analyzing and streamlining their own policies, procedures, and practices.

### **Redesign and Re-Purpose Employer Services**

- Services to employers must move beyond listing jobs and making referrals of job candidates. Local staff should closely align and coordinate with state and local economic development partners to ensure a system of workforce services that will help North Carolina employers reach their full potential. Local staff must be aware of the current business climate and the human resource needs of employers. Emphasis must be placed on assisting existing North Carolina employers with accessing workforce services; including matching employers with Career Center participants that have the skills they require and assisting them access available activities, such as work-based learning, pre-employment skill development, and apprenticeship programs.
- A renewed emphasis will be on developing sector strategies that target high-growth industries, such as green industries, healthcare, life sciences, emerging technology and advanced manufacturing.

### **Meet New Performance Expectations:**

#### **Success Defined Through New Quality Service Metrics**

- North Carolina must move beyond the WIA and Wagner-Peyser common measures that focus exclusively on silo and programmatic performance measures to value-added service delivery. In other words, we must adopt and achieve shared success metrics that value inputs and results– not just performance standards management.