

Best Practices, Benchmarks, Lessons Learned
Integrated Services Delivery

- ✓ Discuss why and how states and locals have moved to integration
- ✓ Capture the best of WIA and Wagner-Peyser cultures
- ✓ Define integrated services delivery and present the key service design elements
- ✓ Share lessons learned and the outcomes from the integrated services pioneers
- ✓ Discuss what will work in North Carolina to plan next steps

Integrated Services Delivery

Agenda Topics

1. Why the Pioneers Embarked on the Integration Journey
2. Environmental Scan: Change Drivers
3. What is Integrated Services Delivery?
4. Bringing the WIA/WP Cultures Together
5. Integrated Services Design Principles:
 - Integrated Customer Pool
 - Integrated Customer Flow
 - Integrated Functional Staffing
6. What Might Work for North Carolina?
7. Getting Started: Best Bets, Next Steps

The Pioneers: Integrated Services Delivery States

- California
- Indiana
- Iowa
- Louisiana
- Missouri
- New York
- Oklahoma
- Oregon
- Utah

- *North Carolina?*

Rationale?

- ✓ Responsiveness
- ✓ Relevance
- ✓ Resources
- ✓ Reengineering

Why They Decided to Say, “Yes” to Integrated Service Delivery

- Respond to a Changing World
- Stay/Become Relevant
- Define Success Beyond Measures
- Serve Customers Even Better
- Increase Number of Customers
- Expand and Improve Services
- Go Lean and Reduce Bureaucracy
- Add Even More Value
- Use Limited Resources Effectively
- Act Now, Before WIA Reauthorization

⚡ *Environmental Scan* ⚡
Strategic Drivers

1. Economy
Very Competitive Labor Market



2. Customers
High Traffic, High Needs



One-Stop Career Centers



3. Resources
Less as the New Normal



4. Policy
Skill and Jobs...Skills for Jobs

What's Changed Since 1996?

Center Change Drivers...

- ⚡ Answering, "What Will You Get at the Center You Can't Get at Home?"
- ⚡ Shifting from "Retail Store" to a "Manufacturer of Talent"



Integrated Services Delivery
Sharing, Serving Customers by Function



Center Service Design Responses...

- ⚡ Going Lean for Process Improvement
- ⚡ Increasing Staff-Assisted Service
- ⚡ Welcoming Customers for Immediate (and Continuous) Engagement
- ⚡ Changing the 90's Sequence of Service
- ⚡ Transforming Intensive Services into a "Core" Service

*We Must Answer This Question to
Justify Infrastructure Costs:
"What Will You Get at the Center
You Can't Get at Home?"*

1996:

- ✓ Core, Self-Service as the
Centerpiece of the Center
- ✓ Resource Area:
Provide Tools and Technology



⚡ The Change Driver ⚡
*⚡ Core, Self-Service:
Virtual, At Home, Libraries ⚡*



2013:

- ✓ More Customers Have or
Have Access to Technology
- ✓ More Invited (Mandatory) Visitors

What Makes You Different?

**Staff-Assisted Service
is the Value-Add!**

↑ The Value-Add ↑

↑ Can't Do By Self ↑

↑ Better Than By Self ↑

↑ Customized Recommendations ↑

↑ Peer Interaction ↑

*- What Does This Driving Change
Mean for Your Customer Flow,
Service Menu, Staff Skills?*

*- Can You Shift to
More Intensive, Staff-Assisted,
Value-Added Services
Without Integrated Staffing?*

⚡ *Emerging Vision* ⚡

Every Center Customer
Leaves as a Better Job Candidate

⚡ *The Center Value-Add* ⚡

Manufacturing Better Candidates

- ➔ All Center Customers Need To Improve Skills to Be More Competitive
- ➔ Just Having Better Job Search Skills Doesn't Make You More Competitive
- ➔ Workforce Improvement is both a Job Seeker and Business Service

Shift: Job Security to Skill Security

- ➔ Not Job or Training (*WP or WIA*)
- ➔ Skill Development and Training
- ➔ Skills and Training for Jobs

**ALL Center Customers
Need an Opportunity to:**

Know Skills



Develop Skills



Get Best Job Possible with Skills

**Center Job Seeker Transformation:
A Universal, Skill-Based,
Integrated Services Customer Flow**

- ✓ Skill Assessment and LMI
and
- ✓ Skill Development and/or
Occupational Training
and
- ✓ Credentials and/or Skill Verification
and
- ✓ Better Job Getting Skills

Partner → Co-locate → Integrate

➤ **Partnership:**

Relationship between two or more separate organizations involved in or sharing an activity

➤ **Integration:**

Synergistic combination of two or more separate organizations acting as a unified whole

Service Integration is NOT...

➤ **Program Consolidation**
(Separate Programs Continue to Exist)

➤ **Just Co-Location**
(Co-Location Can Occur With or Without Partnership or Integration)

Service Integration Progression

Integrated Services Delivery



Integrated Staffing and Resources



Integrated Customer Flow



Integrated Customer Pool



Shared Customers



Shared Activities



Co-located Referrals



Co-located Programs



Non-Co-located Referrals

Integrated Services Delivery

- ✓ Unified vision, policies, metrics
- ✓ Services, not programs
- ✓ Customers, not program participants
- ✓ Our customers, not my customers
- ✓ Programs invisible to customers
- ✓ Programs managed back-of-house
- ✓ Center flow, not program flow
- ✓ Organized by service, not program
- ✓ Unified staffing of customer flow
- ✓ Funding source not determine duties

Beyond Co-location and Partnership!

Start Integrated Services Delivery with WP and WIA Title I Adult/DW

- ✓ 1998 Vision and 2013 Reality
- ✓ Are all Mandatory Partners Equal?
- ✓ WP/WIA Title I the Center Backbone
- ✓ One-Stop Operating Consortia Exist
- ✓ “Common” Measures
- ✓ Adult Core Service Eligibility Similar
- ✓ Have to Begin Somewhere
- ✓ Now in Same State Department

...But How About the Other Partners?

- ✓ Coalition of the Willing
- ✓ Join the Integrated Flow where Can
- ✓ Specialty Services in the Product Box

Creating a New, Integrated Organizational Culture

Culture is...

- The totality of socially transmitted beliefs and behavior patterns
- Qualities that are passed from one generation to the next

Organizational Culture is...

- Sum total of ways people are supposed to (and actually do) act
 - Proven solutions to solving past problems which are learned, valued, transmitted, and reinforced.

Changing Culture Means Changing:

- Expectations
- Values
- Beliefs
- Norms

Bring Together the Best of Both!		
<i>Wagner-Peyser Culture</i>	Integrated Culture	<i>WIA Title I Culture</i>
<i>WIA Title III</i>	Workforce	<i>WIA Title I</i>
<i>Jobs</i>	Skills for Jobs	<i>Training</i>
<i>Employers</i>	Connectivity	<i>Individuals</i>
<i>Universal</i>	More Intense	<i>Selective</i>
<i>Claimants</i>	Customers	<i>Dislocated</i>
<i>Core</i>	Customer Flow	<i>Intens/Train</i>
<i>Single Visit</i>	Engagement	<i>Multiple Visits</i>
<i>Staffing</i>	Resources	<i>Money</i>
<i>Common Meas</i>	Shared Meas	<i>Common Meas</i>
<i>Productivity</i>	Serve to Meet	<i>Performance</i>

Creating a New, Integrated Culture Means Working in the Weeds

- ✓ Total Policy Alignment (in Writing)
- ✓ Clear Operational Procedures
- ✓ Overcoming Specific Prog Barriers

More Than Kumbaya in a Hot Tub!

What is Integrated Services Delivery?

Serving all Center customers seamlessly through:

1. An integrated customer pool, where all center customers (when-ever eligibility permits) are co-enrolled simultaneously in as many programs as possible, so customers may be served by all staff.
2. An integrated customer flow clearly defining a service delivery process with a sequence of universal services that does not emphasize program eligibility and program participation.
3. An integrated staffing chart to providing services by function to the integrated customer pool in the integrated customer flow.

1. Integrated Customer Pool

- ✓ Comply with WIA staff-assisted service registration requirements
- ✓ Co-enroll all adult customers in Wagner-Peyser and WIA Title I Adult Programs at first visit, so all Center Staff can serve all customers seamlessly by service function
- ✓ Streamline WIA Title I eligibility requirements at the core (and intensive service) level
- ✓ Create a data system that makes co-enrollment easy for staff
- ✓ Negotiate performance standards on the common measures to reflect the new customer pool and new service design

Integrating the Customer Pool...

- ❑ “Shared” (Not “Common”) Measures
- ❑ Wagner-Peyser Registers Everyone
- ❑ USDOL TEGL 17-05:
If Staff-Assisted, Must Register WIA
- ❑ If Over 18, Make Everyone an “Adult”
- ❑ Requires 1-1 Customer Entry Meeting
- ❑ Core/Intensive/Training Eligibility
- ❑ Data Validation/Documentation
- ❑ Data Systems Must Permit
- ❑ Negotiate Standards with USDOL

What Happens When You Integrate the WP/WIA Adult Customer Pool?

↓ Entered Employment Down ↓
= Retention Same =
↑ Wages Up ↑

*The JTPA Cultural Legacy...
How to Manage Performance*

- ✓ Managing entry
- ✓ Managing pool
- ✓ Managing exit
- ✓ Managing data

Many Are Called, Few Are Chosen!



*The Vision of Integrated Services...
How to Achieve Performance*

- ✓ Adding Value
- ✓ Engaging Continuously
- ✓ Increasing Risk Pool
- ✓ Negotiating Pool Performance

All Are Called, All Are Chosen

2. Integrated Customer Flow

Providing All Center Customers
The Opportunity To...

✓ Know their skills

An initial, one-on-one welcome meeting to help customers get started with a customized scheduled next service step

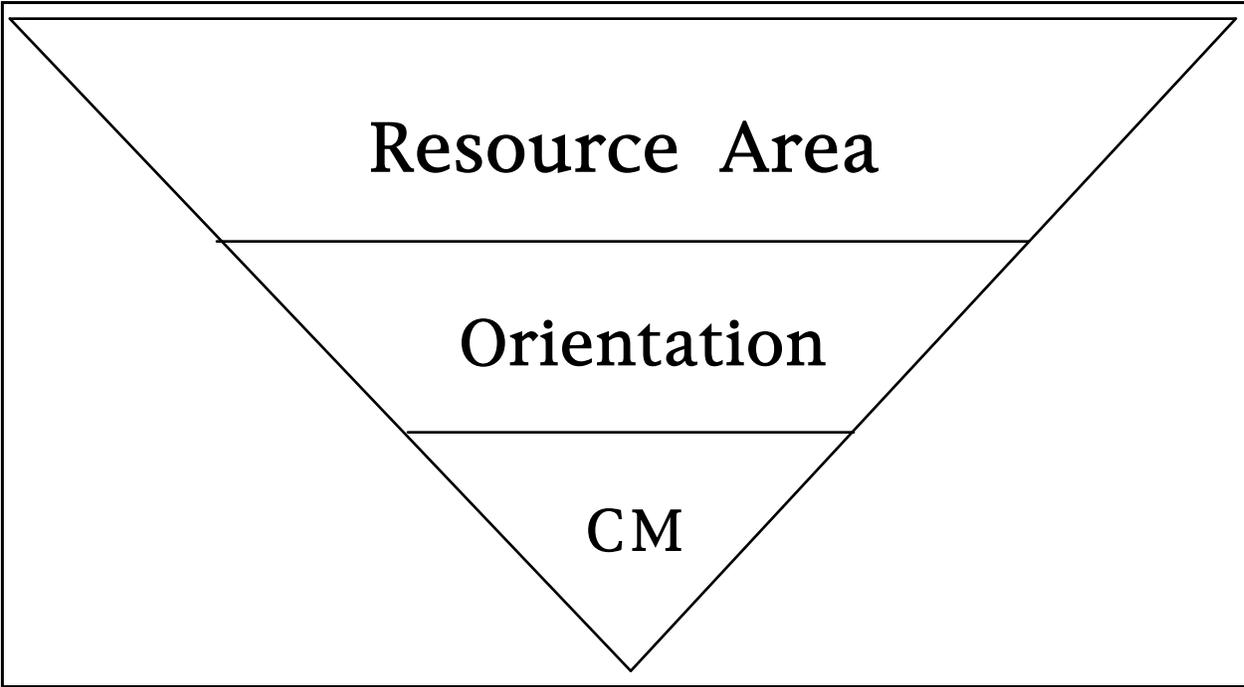
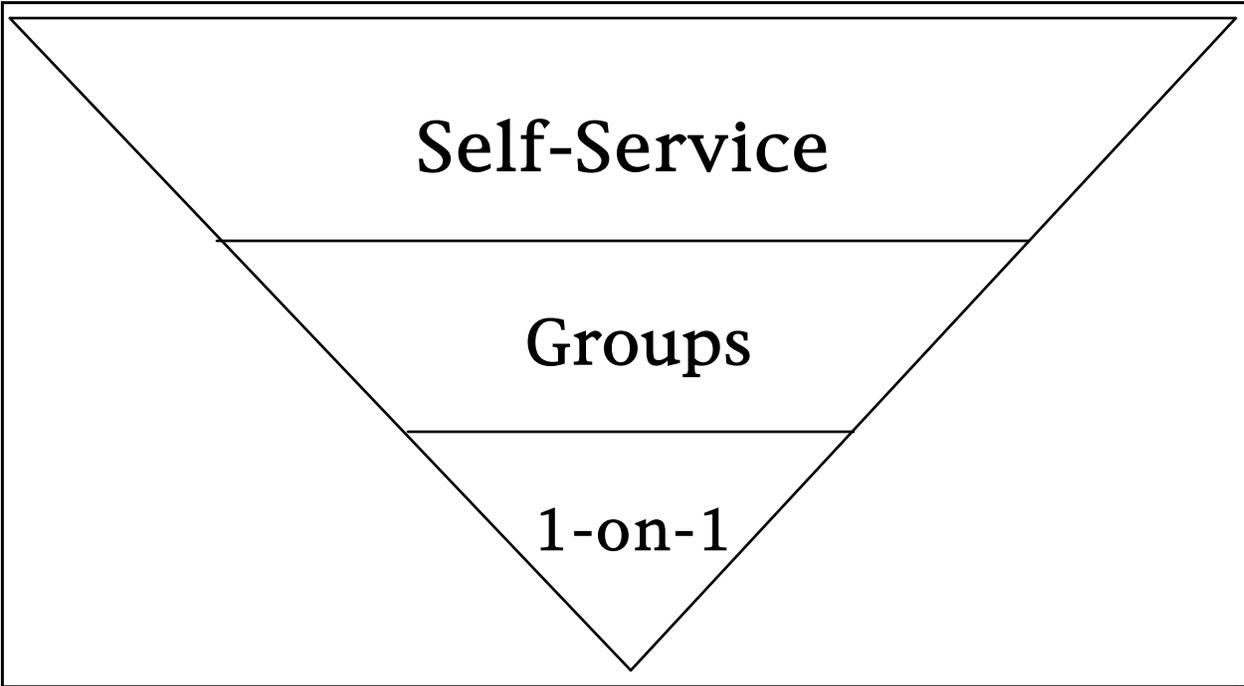
✓ Improve their skills

Easy access to a robust menu of demand-driven, staff-assisted skill enhancement products

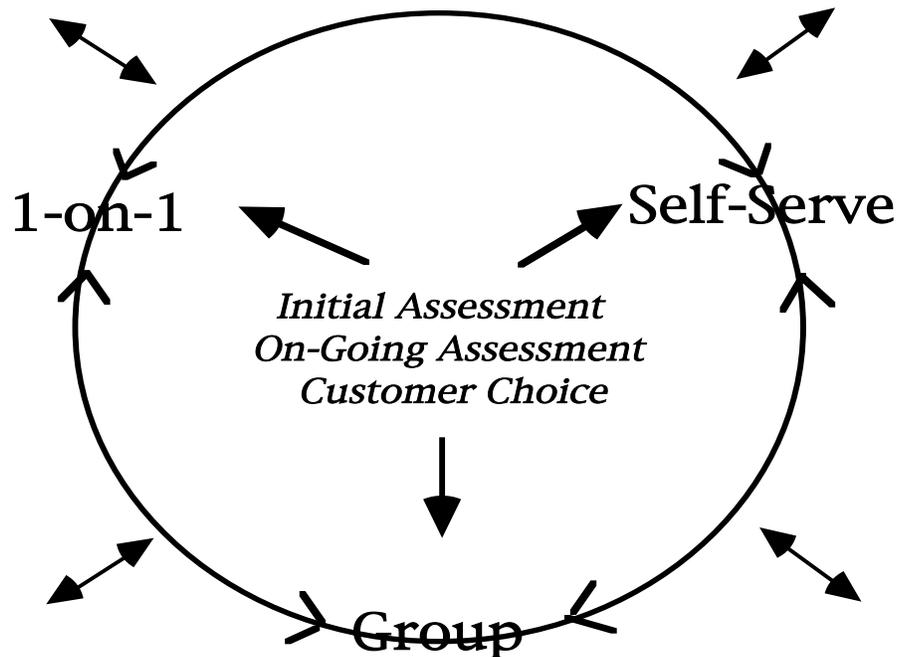
✓ Get best job with their skills

Attachment to labor market by verifying skills to meet employer qualifications

*The 1990's Customer Flow Paradigm:
Triaged, Service Delivery Methods*



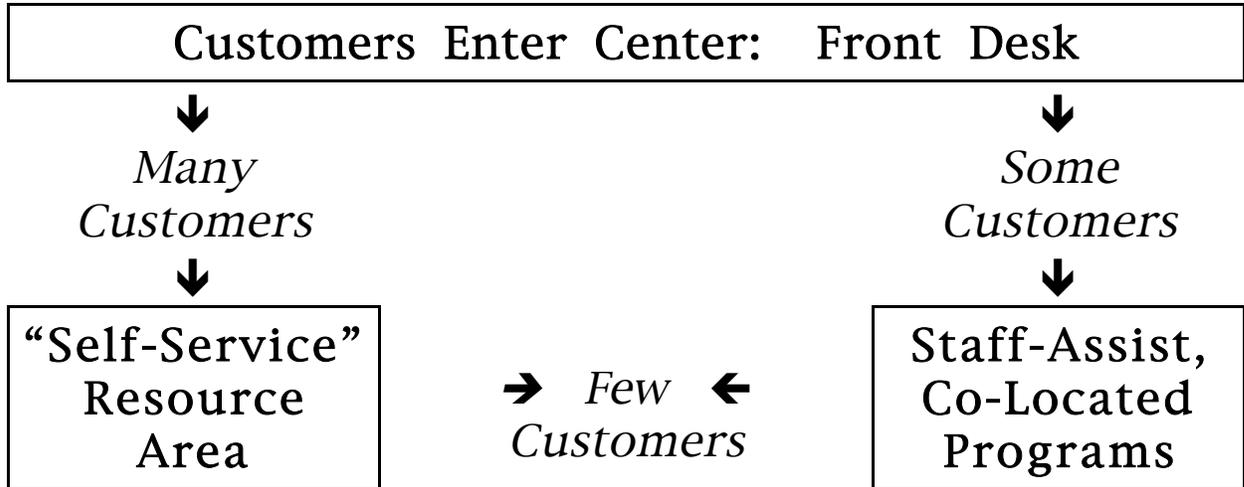
Innovation: The Service Wheel



Not a Rigid Paradigm with a
Triage by Service Delivery Method!

- ✓ Start with customer: 1-on-1
- ✓ Just get started on the service wheel
 - ✓ All services by all three methods
 - ✓ Every time, cross-market services

***A Very 1990's Center Customer Flow...
Everyone Starts in the Resource Room!***



? Does It Really Work ?

? Designed to Serve or “Manage” Flow ?

? Is it a Value-Add, Service Focus ?

? Is it Really “Self-Service” ?

? Too Few Staff, Too Many Customers ?

? Destination or Intensive Service Path ?

Every Customer Deserves An
Initial, Getting-Started,
Private, Staff-Assisted,
Customized Welcome

What Should All First Time
Customers Get at Welcome Meeting?

? A Sincere “Thank You for Coming” ?

? An Initial, Initial Assessment ?

? System and Job Bank Registration ?

? A Job Lead or Job Referral ?

? Recommended Next Step ?

? Scheduled Next Service ?

*A Positive Experience
with Tangible Take-Aways*

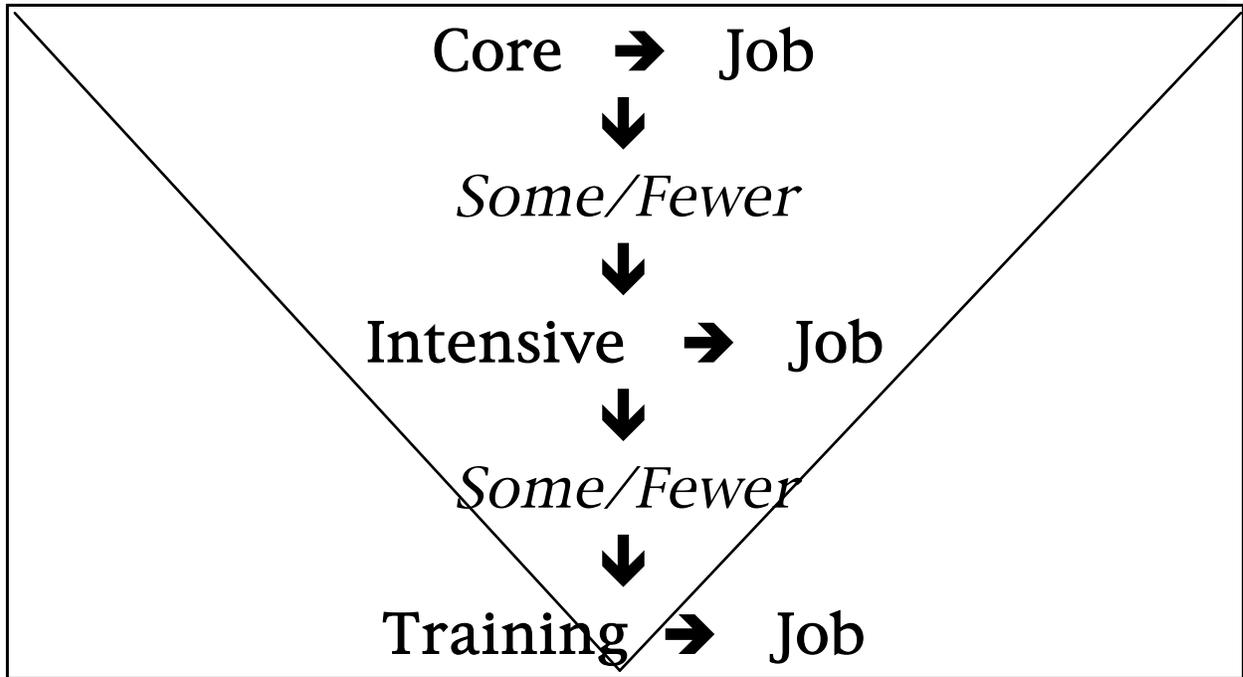
Staffing the Initial, 1-on-1 Welcome:

- ✓ Collect Data to Decide Feasibility:
Number New/Return
 - ✓ Redeploy Staff and
Create a Welcome Function/Team
- ✓ Decide How Quick a Welcome:
15 Minutes or So!
- ✓ If “Invited” to Group and Then 1-1,
Why Not Just 1-1?
 - ✓ Unbundle Customers:
New, Return, Program Attached

⚡ Innovation ⚡ Multiple Resource Areas

- ✓ Merchandising: Hide the “Zoo”
- ✓ Multiple, Smaller, Functional Areas
 - ✓ “Program Staff” Assist
Their Own Customers in Areas

1998: WIA Adopts the Paradigm



Core Services



*WIA Adults: Meet priority criteria, if low funding
At least one core service AND
Unemployed, no job thru core services AND
Needs Intensive for a job or self-sufficiency*



Intensive Services



*At least one intensive service AND
Can't get or keep job through Intensive AND
Needs training and meets provider qualifications AND
Selects training responsive to demand AND
Other financial aid not available or insufficient*



Training Services

Updating the Service Paradigm!

- ✓ “Work First” for Everyone?
- ✓ Many Need Concurrent Levels
- ✓ Skill Development: For Everyone!
- ✓ *Need* Training: Not Job-Getting Test
- ✓ More Training: WIA-Funded or Not

Transforming Intensive Services into a "Core" Service with Value-Added, Skill Services

- Making Intensive “Universal”
- Beyond Training Entry Path
 - Bridging WIA and WP

1998: Intensive/Training
2013: Core/Intensive

Core Services



WIA Title I Intensive Services May Include:

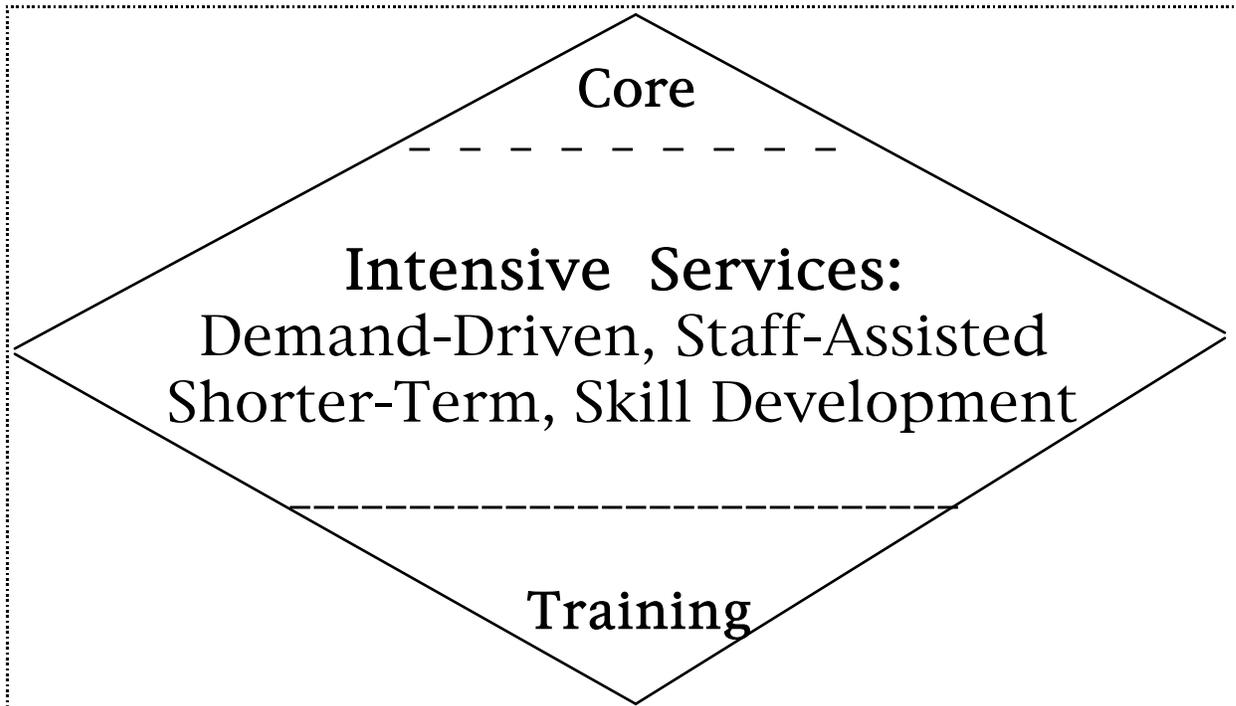
- Comprehensive and specialized assessments of skill levels and service needs through diagnostic testing and other assessment tools, and in-depth interviewing and evaluation to identify barriers and employment goals
- Individual employment plan with employment goals, achievement objectives, and services needed
- Group/individual counseling, career planning
- Case management for seeking training services
- Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare for employment or training

“The list is not all-inclusive and other intensive services, such as out-of-area job search assistance, literacy activities related to basic workforce readiness, relocation assistance, internships, and work experience may be provided, based on an assessment or IEP .”



Training Services

Transforming the Cone of Service Into The Manufacturing Talent Diamond



*“WIA Title I Intensive Services may
include*

*Short-term prevocational services...
prepare for employment or training”*

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

Intensive, Short-Term Pre-Vocational, Talent Development 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.

Talent Development Services

- ✓ Basic Skills and Skill Brush-Up
- ✓ Pre-Employment Testing/Remediation
- ✓ Soft Skills
- ✓ Computer/Internet Skills
- ✓ Words-for-Work
- ✓ Customer Service Skills
- ✓ Skill-Based Work Experience
- ✓ Job and/or Industry-Specific Skills
- ✓ WorkKeys and NCRC

⚡ *Innovation* ⚡

Make Entry Into Intensive Easier!

The 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.”

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

- ? Limited for Training, Not Intensive ?
- ? Priority: Does It Mean Everyone ?
- ? Limited If Expend Direct Dollars ?

*Make the Wall Between
Core/Intensive Seamless!*

The Pioneers Go *Lean* to Design the Integrated Customer Flow

Lean Manufacturing:

- First: Eliminate “Waste”
- Always: Add Value

“Waste” is any step that doesn’t add value to desired outcome

- (1) Required for business waste
- (2) Not required for business waste

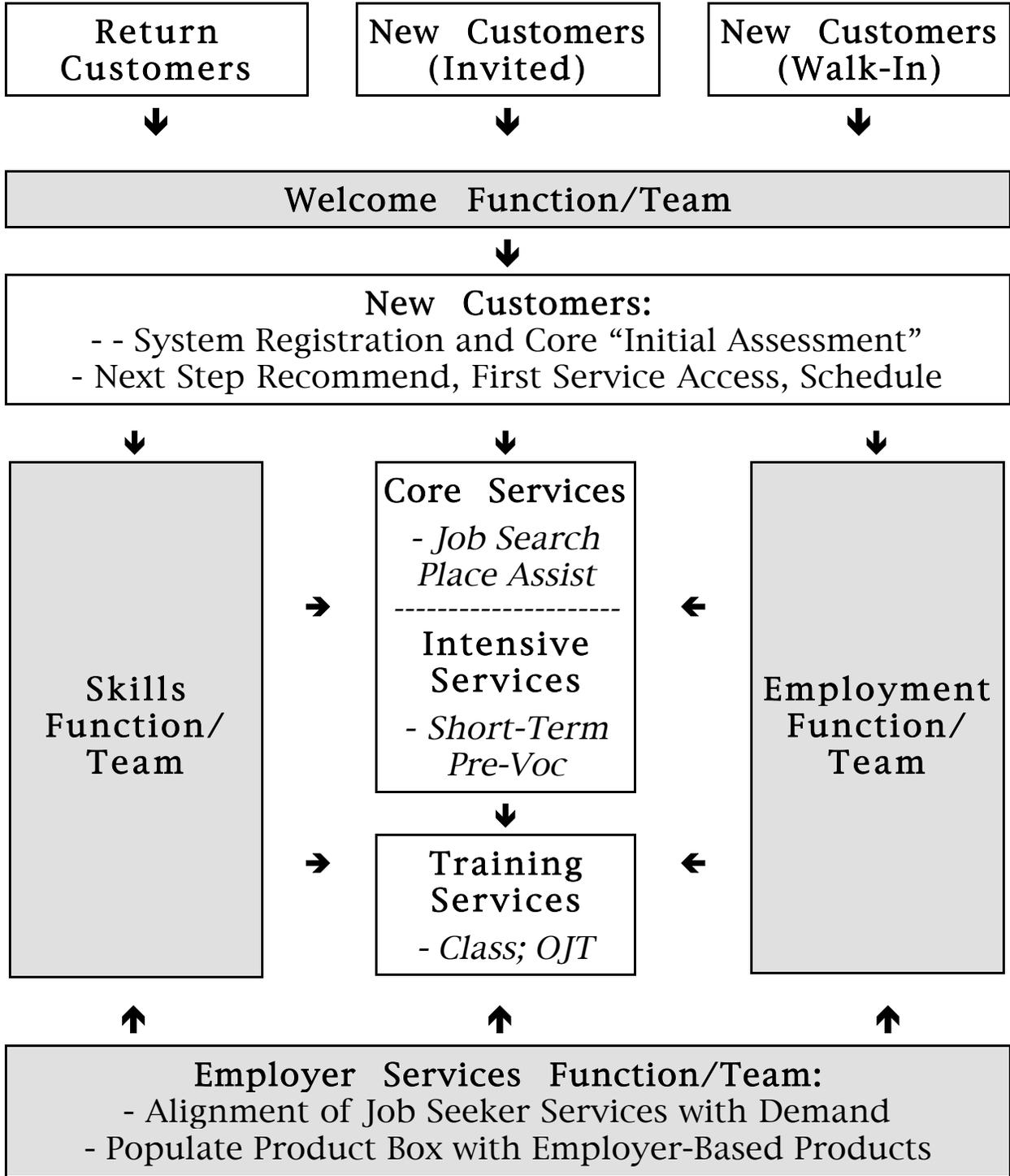
Required for Business:

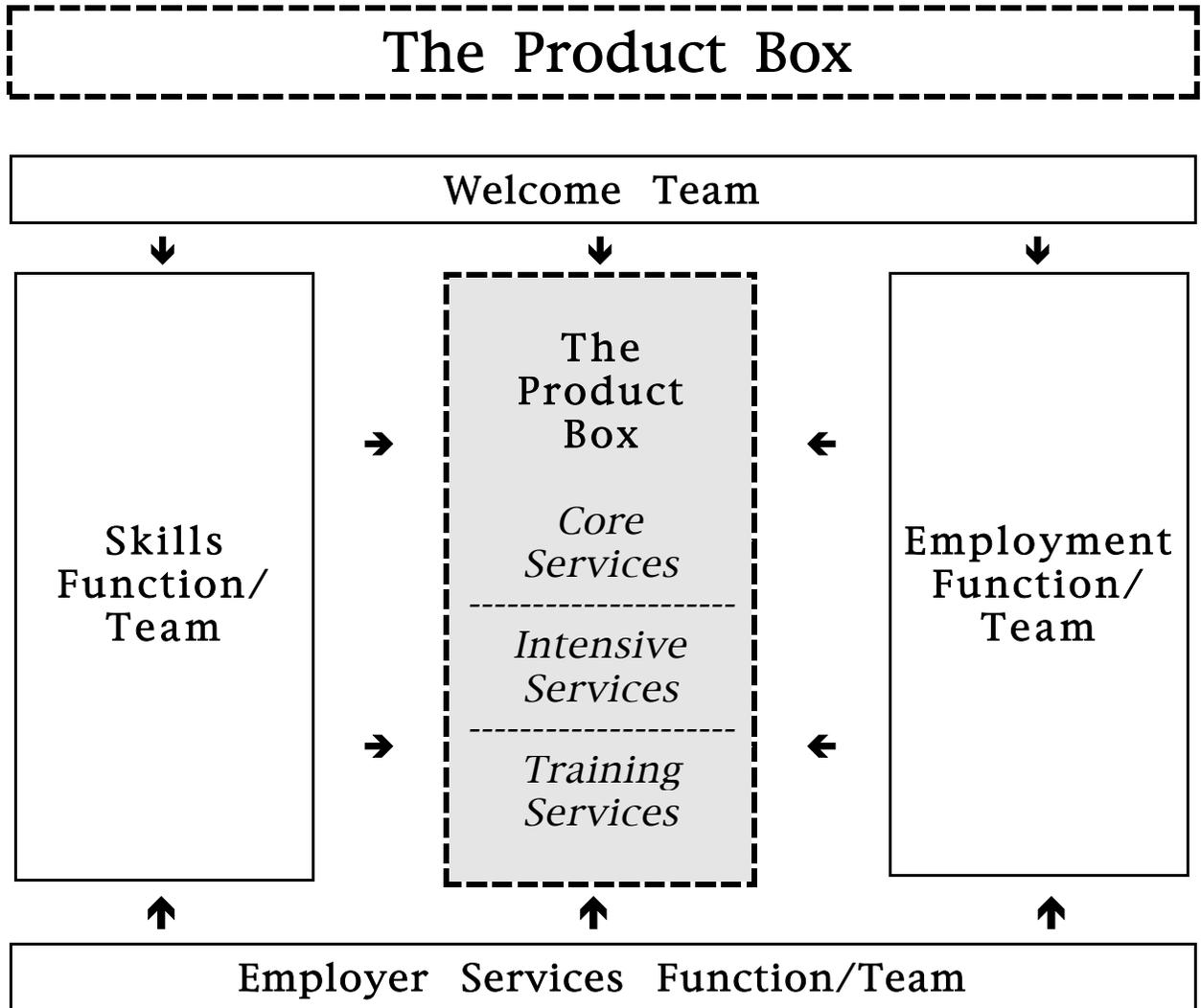
- * *Have To: Comply and Minimize!*
- * *Don’t Have To: Don’t!*

“Added Value” is any step that:

- increases customer-defined value
- improves outcomes

The Pioneers: Integrated Center Customer Flow





- ✓ 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

Product Development



The Product Box

Job Search and Readiness

- Job Seeking Skills
- Job Clubs
- Job Keeping Skills
- Life Management and Job Loss Skills

Skill Development and Improvement

- Basic Skills and Skill Brush-Up
- GED Prep and GED Attainment
- Short-Term, Pre-Vocational Services
- Computer/Online Skills (Basic/Applications)
- Customer Service Skills
- Skill Verification

Occupational Training

Employer-Sponsored/Based

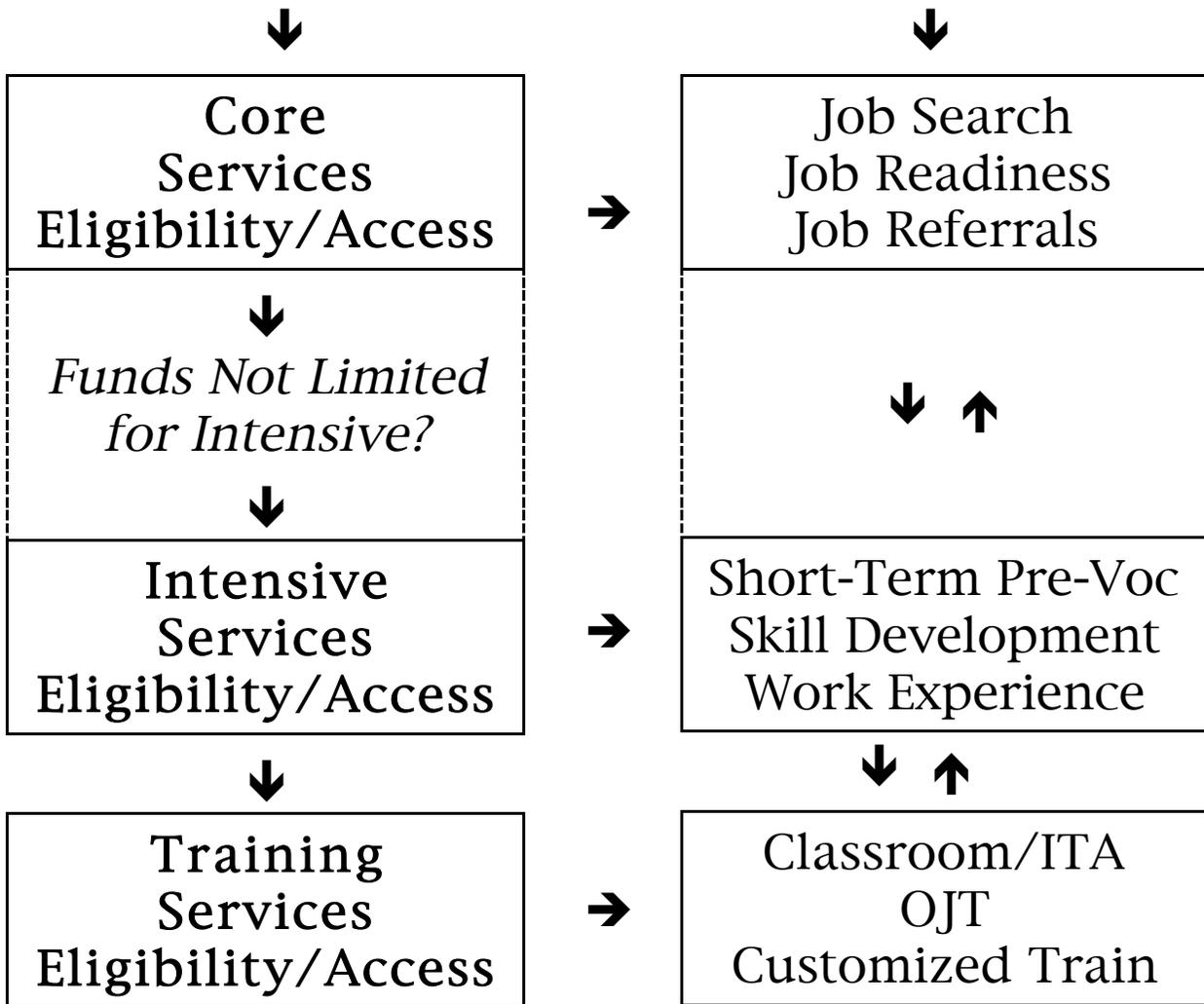
- OJT and Customized Training Opportunities
- Skill-Based Internships/Work Experience
- Customized, In-Center Recruitment Events
- Responsive, Suppressed Job Orders



Employer Services

Service Tier Eligibility for Product Box Services

Center Customers



*Streamline Intensive Services Delivery:
Merge Core and Intensive?*

The Product Box



Employer Services Function/Team

- ✓ Across Centers within labor market
- ✓ Provides demand-driven alignment advice for job seeking and skill development products
- ✓ Engages employers in the 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*

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***

3. Integrated Staffing

- ✓ Integrated centers have a designated and clearly defined center manager with functional team leaders (The manager and team leaders are named without regard to funding source)
- ✓ Functional teams staff the adopted customer flow and team membership includes staff paid by different funding sources (Affiliation is by functional team and not by program)
- ✓ Staff organization is by key Center service functions: welcome, skills, employment, employer
- ✓ Staff in smaller Centers deliver the functions, even if no separate teams
- ✓ All teams (and all staff) help all customers access all Center services

Center Service Functions/Teams

Welcome

- ✓ Greet and Co-Enroll
- ✓ Conduct Initial Assessment
- ✓ Recommend/Schedule First Service

Skills

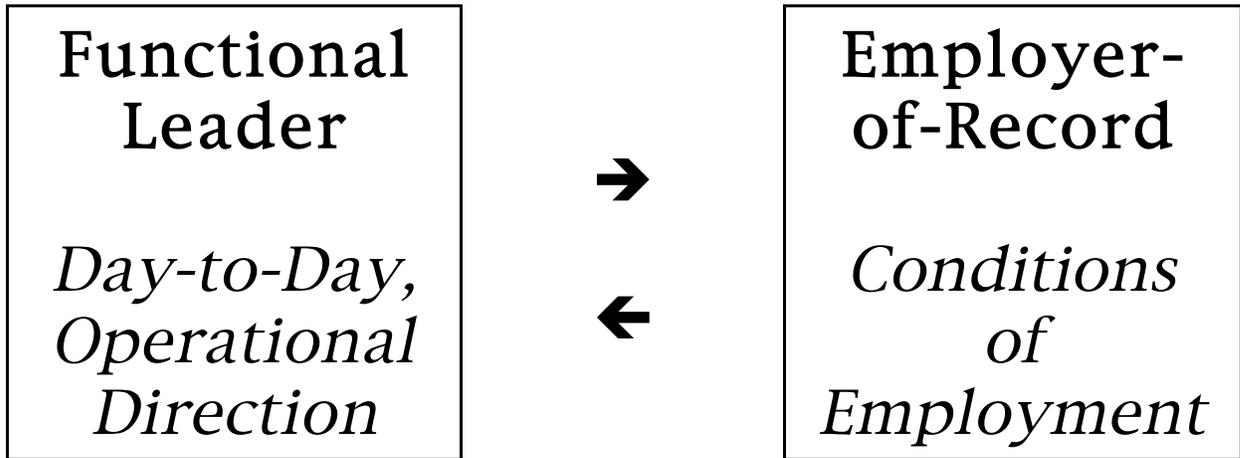
- ✓ Skill Development (w/Job Outcome)
- ✓ Comprehensive Skills Assessment
- ✓ Provide Easy Access to Product Box
- ✓ Continuously Engage

Employment

- ✓ Job Getting (w/Skill Opportunities)
- ✓ Customized Job Search Advice
- ✓ Provide Easy Access to Product Box
- ✓ Continuously Engage

Smaller Centers: Skills/Employment

Integrated Functional Leadership



One-Stop Center Staff

Making It Work!

- ✓ Clarity of Who, What, When
- ✓ Within MOU and Defined Procedures
 - ✓ Functional Job Descriptions
- ✓ Leaders: Informal and Formal Power

Implementing Integrated Staffing

Recommended Sequential Steps...

1. Decide Customer Flow/Functions
2. Create Functional Org Chart
3. Develop Functional Job Descrips
4. Define Functional Leadership
5. Embed in MOU, Operator Agree
6. Identify Center Leader
7. Deploy Staff by Talent
8. Name Functional Leaders
9. Build Functional Teams/Identity
10. Teams Develop Ops Procedures

State and Locals Must Row Together to Integrate Services Delivery

- ✓ Commit to Longer-Term Change
- ✓ Integrate at Both State/Local Levels
- ✓ Form Integration Leadership Team/s
- ✓ Design Framework Jointly
- ✓ Create New Integration Policies
- ✓ Leverage Law/Regulatory Flexibility
- ✓ Remove Integration Policy Barriers
- ✓ Align Everything—*Everything!*
- ✓ Align Everyone—*Everyone!*
- ✓ Seek USDOL Support

*What Did You Like Best
From the Integration Pioneers?*

Force Field Analysis

Restraining Forces: What's Holding You Back?



NC Works Integrated Service Delivery



Driving Forces: What's Pushing You Forward?

Making it Work for NC Works!

Your Recommendations!

Best Bets!

Next Steps!