Best Practices, Benchmarks, Lessons Learned

Integrated Services Delivery

1. Discuss why and how states and locals have moved to integration

2. Capture the best of WIA and Wagner-Peyser cultures

3. Define integrated services delivery and present the key service design elements

4. Share lessons learned and the outcomes from the integrated services pioneers

5. Discuss what will work in North Carolina to plan next steps
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!

<table>
<thead>
<tr>
<th>Wagner-Peyser Culture</th>
<th>Integrated Culture</th>
<th>WIA Title I Culture</th>
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</thead>
<tbody>
<tr>
<td>WIATitle III Jobs</td>
<td>Workforce</td>
<td>WIA Title I Training</td>
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<tr>
<td>Employers</td>
<td>Connectivity</td>
<td>Individuals</td>
</tr>
<tr>
<td>Universal</td>
<td>More Intense</td>
<td>Selective</td>
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<tr>
<td>Claimants</td>
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<tr>
<td>Core</td>
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<td>Single Visit</td>
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<td>Staffing</td>
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<tr>
<td>Common Meas</td>
<td>Shared Meas</td>
<td>Common Meas</td>
</tr>
<tr>
<td>Productivity</td>
<td>Serve to Meet</td>
<td>Performance</td>
</tr>
</tbody>
</table>

## 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 (whenever 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

Self-Service

Groups

1-on-1

Resource Area

Orientation

CM
Innovation: The Service Wheel

1-on-1  
Self-Serve  

Initial Assessment  
On-Going Assessment  
Customer Choice  

Group  

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!

Customers Enter Center: Front Desk

- Many Customers
- "Self-Service" Resource Area
- Few Customers
- Staff-Assist, Co-Located Programs

? 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 ➔ Job
↓
Some/Fewer
↓
Intensive ➔ Job
↓
Some/Fewer
↓
Training ➔ Job

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

Core

Intensive Services:
Demand-Driven, Staff-Assisted
Shorter-Term, Skill Development

Training

“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

- Return Customers
- New Customers (Invited)
- New Customers (Walk-In)

Welcome Function/Team

New Customers:
- System Registration and Core “Initial Assessment”
- Next Step Recommend, First Service Access, Schedule

Skills Function/Team

Core Services
- Job Search Place Assist
- Intensive Services
- Short-Term Pre-Voc

Employment Function/Team

Training Services
- Class; OJT

Employer Services Function/Team:
- Alignment of Job Seeker Services with Demand
- Populate Product Box with Employer-Based Products
The Product Box

Welcome Team

Skills Function/Team

The Product Box

Core Services

Intensive Services

Training Services

Employment Function/Team

Employer Services Function/Team

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

GregNewtonAssociates.com       617.426.5588       NewtonGreg@aol.com
### 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**

*GregNewtonAssociates.com  617.426.5588  NewtonGreg@aol.com*
Service Tier Eligibility for Product Box Services

Center Customers

Core Services Eligibility/Access

Funds Not Limited for Intensive?

Intensive Services Eligibility/Access

Training Services Eligibility/Access

Job Search
Job Readiness
Job Referrals

Short-Term Pre-Voc Skill Development
Work Experience

Classroom/ITA OJT
Customized Train

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

Functional Leader

Day-to-Day, Operational Direction

→

Employer-of-Record

Conditions of Employment

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!
Best Bets!
Next Steps!