Service integration policy workgroup NOTES

Date: August 16th, 2022

Time: 1:00-2:00pm

Location: Zoom

**Chair:** Becky Raymond

**A close up of a logo

Description automatically generatedMembers:** Justin Arnold, Janice Taylor Brown, Rena Bryson, Lora Dhom, Courtney Geiger, Sarah Goldammer, Aime’e Julian, Stacey Kregel, Marisa Lewis, Kathy Olesen-Tracey, Brian Richard, Natasha Telger, Carrie Thomas, and Kit White

**Members Absent:** Lisa Jones, Andy Losasso, Todd Lowery, Rahnee Patrick, Tony D. Stephens

**Workgroup Support:** Sarah Blalock and Molly Cook

**Guest:** Drew Thomason

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| Time | Item | Owner |
| 1:00pm | Welcome, Agenda, and Roll Call | Becky Raymond |
| 1:02pm | Overview of July Meeting   * Becky Raymond reviewed current workgroup priorities, including:   + The barriers to integrating services,   + Its current relation to a post COVID-19 workforce   + Opportunities to improve operationalization long-term * Becky Raymond also reviewed the July meeting topics including,   + Introductions, what happens if we get this right, how might we improve service integration * Workgroup members introduced themselves. | Becky Raymond |
| 1:10pm | Level Set: 2019 Self-Assessment and CWEA Commission Overview   * Brian Richard shared an overview of the 2019 self-assessment and the 2022 IL Workforce Commission, User & Stakeholder Working Group * Brian Richard explained that in the self-assessment, there was a continuum of isolation to fully integrated. Each local area was asked to scale their rate of service integration based on The Integration Continuum for 15 service integration goals. * Throughout the 2022 Workforce Commission there was an effort to look at themes that were present in 2019 and 2022. * Common themes included: customer intake, staff training, customer input, frontline staff input * Theme 1: Customer Intake –   2019 Service Integration Self-Assessment themes included: create a universal intake form, establish a shared case management system, an electronic referral system, develop procedures on how information is shared across agencies, create a universal consent form, and institute customer navigation.  2022 Workforce Commission themes included:   * Pain point – eliminate practices that are redundant, burdensome and that retraumatize users by:   + Investigate and identify rules, polices and or procedures that create unnecessary steps for users to access system services   + Create a shared, integrated management information system for all system stakeholders   + Change the operating culture to a user-centered approach. * Theme 2: staff training   2019 SI Self-Assessment themes– establish shared vision for customer service, establish core staff competencies  2022 Workforce Commission Pain Point – frontline staff lack training to appropriately serve and respond to the full range of user needs.   * Theme 3: Customer Intake   2019 Self-Assessment: Continue to use/revise/update existing customer satisfaction tools, redesign customer survey for process improvement, review customer satisfaction survey to represent all programs/services  2022 Workforce Commissions:  Pain Point – Eliminate practices that are redundant, burdensome, and that retraumatize users by: investigating and identifying rules, policies and procedures that create unnecessary steps for users to access system services; create a shared integrated management information system for all system stakeholders; change the operating culture of AJCs and require contractors to adopt a user-centered approach   * Theme 4 – Frontline Staff Input   Service Integration Self Assessments: create online staff survey to solicit improvements, form a job seeker service team of frontline staff, solicit frontline staff input into policy at the State level, conduct an anonymous survey of LWIB and partner staff   * Becky Raymond shared the Equity Task Force (ETF) recommendations, including:   + Customer Intake: Acquire cultural competence   + Staff Training: Diversify workforce system leadership and staff and provide systemwide training; ensure leaders have the information, data, training and skills needed to address equity challenges   + Consumer Input   + Frontline Staff Input | Brian Richard |
| 1:25pm | Group Discussion:   * How have the last two years impacted challenges to service integration? * What barriers do we see now to service integration?   Justin Arnold asked who we’re trying to get to integrate services?  Kathy Olesen-Tracey listed a misunderstanding at the local level of service integration as a barrier. We need clarification on who is a WIOA eligible individual and be able to take that to the local level.  Lora Dhom suggested updating the referral process.  Kit White described a barrier as all of the partners being on different data systems.  Rena Bryson noted in the chat - A refresher component might not be a bad idea. Maybe incorporate a brief level of training during a Partnership meeting when there's a level of high-level of participation. Just a thought.  Justin Arnold and Kathy Olesen-Tracey suggested that we ensure that we are looking at the scope of our work. Kathy noted that a shared data system would not necessarily help the local level and we need to focus on serving the local level.  Natasha Telger noted in the chat - I think a simple way to share eligibility to both providers and to customers/clients would be good. Identifying pieces and parts to show eligibility would be great to display information.  Carrie Thomas agreed that an integrated data system would be helpful, but it would be helpful to consider barriers we are creating and how we can impact those. The intake and referral process is a smart place to start  Kathy Olesen-Tracey clarified that shared referrals are huge. But, before intake, we need a matrix of who is eligible for what so that everyone is accessing the services they need. There is a lot of turnover in Title II currently. What do frontline staff need to know?  Lora Dhom noted in the chat that some states have an intake area where customers answer questions and the system then helps to determine which programs they may be eligible for. Again, agree with all that the staff need to know, but a system would help to make it seamless as well.  Courtney Geiger explained: I think this is all possible, but it has to start with a customer centered and no wrong door philosophy. | ALL |
| 1:41pm | Group Discussion:   * What do we want to know moving forward?   Janice Taylor Brown noted in the chat I believe LWIA 7 was collecting program eligibility information for a comprehensive cross-training. Has that been completed? That may be a good start to educating partners about eligibility requirements.  Courtney Geiger said it would be helpful to know who does regular partner training. Courtney also shared: We have a video that all partners and front line staff see to educate on all program services and referral process.  Justin Arnold suggested asking what does an intake look like online?  Lora Dhom explained in the chat - Look at past assessments to see which areas the local areas were lower on the continuum so we can focus training efforts on those topics.  Kit White explained: We are collecting that info in LWIA 7. Stacey is leading that process. I don't know that we've finished gathering everything for the cross training. Stacey added LWIA 7 is still working on the comprehensive cross training video. Think we should probably add a piece around explaining service integration and a unified customer service approach.  Courtney Geiger asked in the chat - Maybe also asking who has community navigators that connect people to the different programs?  Sarah Blalock noted that we are working on gathering this information from local areas.  Lora Dhom suggested getting a customer focus group together. Kathy Olesen Tracey asked if this had already happened through the workforce commission?  Carrie Thomas explained that the stakeholder group information will be very helpful. It will be important to build off of what’s been done.  Carrie Thomas highlighted what Justin Arnold had said before – in some locations, not all partners are physically present at that location.  Courtney Geiger noted in the chat: Maybe as we assess, we can identify best practices and who is doing it well to share with all the areas so no one is recreating the wheel?  Natasha Telger asked if this is focusing on services provided to individuals, or should we be focusing on providing services to employers and businesses? Kathy Olesen Tracey said that is a very important question as we work on the scope of this group. The focus has not been on employers, but we should keep it in mind. | Becky Raymond |
| 1:56pm | Next Steps   * Sarah Blalock noted that we will have a draft survey next month * Carrie Thomas and Kathy Olesen-Tracey asked who is being surveyed? * Carrie Thomas said that surveys can be very complicated depending on where you’re situated in an organization. Carrie said she is unsure if that is the best starting point. Carrie said that scanning the local plans is a good starting point or creating structured interviews. Kathy also struggled with a survey when the Workforce Commission just happened. * Three areas – intake/referral, eligibility matrix | Becky Raymond |
| 2:04pm | Adjournment: Thank you  Next meeting: 9/20/22 | Becky Raymond |

**Charge:**

WIOA empowers State and local elected officials and private sector‐led workforce boards with the responsibility of developing a strategic, integrated plan that supports economic growth and labor force needs intended to grow the capacity and performance of the workforce system.  To that end, the Illinois Workforce Innovation Board (IWIB) is forming a service integration policy work group to convey State‐level expectations of local workforce areas as they address this critically important feature of their one‐stop centers.

**Priorities:**

* Integrate service delivery improving access and opportunity for all populations
* Cross‐agency collaboration and alignment for developing and/or promoting career

pathways and industry recognized stackable credentials

* Review the 2019 self-assessment process for relevance in a post-COVID environment

**Workgroup Topics and Considerations include:**

* USDOL Guidance on the One Workforce Vision DOL Notice TEN 13-20
* USDOL Training and Employment Guidance Letter 4-15
* USDOL Training and Employment Guidance Letter 16-16
* USDOL Training and Employment Guidance Letter 3-14
* The 2019 Service Integration Self-Assessment
* IWIB Equity Task Force Recommendations
* Workforce Commission Recommendations
* Best practices