

WorkOne Customer Flow Policy Summary

The integration policy was designed at a time of low unemployment and lower volume. However, in a high-volume and high unemployment environment, some of the operational requirements of the integration policy have become burdensome and hindered the original intention of the policy. At this time, adjustments to the integration policy must be made to ensure that all customers have easy access to a wide range of services that will enable them to attain meaningful employment. In addition, this new policy will ensure that certain individuals whom we identify or who self-attest as needing more assistance will have easier access to in-depth services, including counseling, to assist them in attaining meaningful employment.

The new operational flow assumes two basic customer tracks:

- **Job-to-Job track:** Employment where an individual earns a self-sustaining wage in an occupation in a stable industry
- **Job-to-training-to job track:** Employment in an occupation with a self-sustaining wage for which an individual was trained

Policy Section	Current DWD Policy	Proposed DWD Policy	Rationale
Initial Intake	<ul style="list-style-type: none"> • Require staff to collect the “10 data elements” • Every customer must take a short staff-assisted initial skills assessment 	<ul style="list-style-type: none"> • As much as possible, customers should be encouraged to enter their own information into the system • Staff time spent on the initial intake should be minimal and conducted solely to verify that a customer’s information is in the system • No formal initial assessment should be used 	<ul style="list-style-type: none"> • The goal is to get customers registered as quickly as possible in order to offer them services • We want to minimize the amount of staff and customer time taken by data collection; most services do not require significant data collection • Removing the requirement of a formal assessment will alleviate a significant bottleneck in the current system
Customer Flow	<ul style="list-style-type: none"> • Referral to the Skills Team or Employment Team as appropriate 	<ul style="list-style-type: none"> • Any customer who requests additional, individualized services should have the opportunity to speak to a case manager • Additionally, certain customers should be encouraged to speak to a case manager based on their answers to two key demographic questions: <ul style="list-style-type: none"> • Education level: Less than or only a HSD/GED • Length of Unemployment: if the customer has been unemployed for a significant amount of time, which will be designated by DWD • Any customer who appears to have difficulty reading or operating a computer should be offered the opportunity to meet with a case manager • Any customer who is TAA certified should speak to a case manager • Any customer who is an REA/RES participant should speak to a case manager 	<ul style="list-style-type: none"> • Education level can be a good indicator of the level of service that a customer might require to attain meaningful employment • Length of unemployment is also a good indicator of the level of service that a customer might require

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Core Services and Workshops	<ul style="list-style-type: none"> • Very general guidance on workshop content: “All WorkOne Centers ... shall offer robust, innovative, and integrated product lines.” • Notes the types of the workshops that must be offered, at a minimum 	<ul style="list-style-type: none"> • Requires that full service WorkOnes offer an orientation workshop and provides the minimum content requirements • Requires that all WorkOnes offer an information packet on the products and services available at WorkOne and provides the minimum content requirements • Requires WorkOnes to offer other specific informational workshops including resume writing, interviewing, discovering career interests, job search, unemployment insurance, digital literacy, financial literacy. In addition, it provides the minimum content requirements for these workshops. 	<ul style="list-style-type: none"> • Provides consistency of services for customers both between and within regions • Consistency allows for easier data collection for performance metrics • Offering workshops as a core service will alleviate the amount of data collection required and remove a “bottle-neck” • Workshops are considered a “core service” because they offer information that is already available to a customer • By requiring the minimum content levels, it provides some consistency while allowing regions to add to the content and innovate
Case Management	<ul style="list-style-type: none"> • At regional discretion 	<ul style="list-style-type: none"> • All customers who require or request services beyond core services should have a case manager, regardless of education level • As much as possible, customers should be able to see a case manager immediately, however appointments should be made if necessary • A case manager should conduct an informational interview, should start the ACP, and “fully enroll” the customer • If possible, customers should be able to see the same case manager until the customer exits the system • Different levels of case managers within intensive services would be appropriate • Case managers are expected to assist the customer with developing and following their ACP, act as a resource • Case managers can administer/proctor assessments, set appointments, and provide other level services 	<ul style="list-style-type: none"> • A case manager can provide individualized attention to ensure customers persist until employment • DWD anticipates that most members of WorkOne’s “Skills and Employment” teams will become case managers
Individual Employment Plans (IEP) / Academic and Career Plans (ACP)	<ul style="list-style-type: none"> • Only customers entering occupational skills training need to receive an IEP 	<ul style="list-style-type: none"> • An IEP and an ACP are equivalent • All participants in intensive services should receive an ACP • Case manager must jointly develop the ACP with the customer • ACPs can be adjusted as necessary and appropriate • ACP should indicate how often the case manager should check-in with the client • Should follow the format designated by DWD 	<ul style="list-style-type: none"> • An ACP is intended as a means to provide customers with a clear road-map to employment • By jointly developing it, there is more accountability between case managers and customers • Enables customers to take responsibility • Following DWD’s format provides consistency

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Check-Ins Throughout Participation	<ul style="list-style-type: none"> • At regional discretion 	<ul style="list-style-type: none"> • WorkOnes are required to “check-in” with all customers in Intensive Level services • Check-ins are defined as reciprocal communication between the WorkOne staff member and customer that identifies how a customer is progressing • Additional services should be offered either over the phone or in-person • Any service provided over the phone must be documented in a case note • For customers with an ACP who are not enrolled in occupational training or ABE, check-ins should occur within 30 days of a “soft exit” at a minimum • For customers in ABE or occupational skills training, check-ins should occur a minimum of every 45 days • As much as possible, case managers should contact their customers 	<ul style="list-style-type: none"> • Will help to prevent “soft-exiting” from the system • Will build a relationship between the customer and the staff person • Will help to keep customers engaged
Intensive Services	<ul style="list-style-type: none"> • At regional discretion 	<ul style="list-style-type: none"> • Requires minimum intensive services that WorkOnes must offer such as intensive workshops, job clubs, formal assessments, case management, and adult basic education 	<ul style="list-style-type: none"> • Provides consistency of services for customers both between and within regions • Consistency allows for easier data collection for performance metrics
Assessments	<ul style="list-style-type: none"> • General guidance on the type of assessments • Regions determine which assessments to use and for which purposes; in a 2009 survey, over 23 assessments were in use with little consistency 	<ul style="list-style-type: none"> • DWD has procured three valid and reliable assessments for the regions to use in the areas of Educational Attainment, Career Interests, and Workplace Skills • Defines the appropriate use for each assessment • Allows for regions/local areas to request to use other additional assessments 	<ul style="list-style-type: none"> • Provides consistency of services for customers both between and within regions • Ensures that customers take assessments that would be of the most use for their needs • Ensures that assessments are reliable and valid
Academic and Career Counselors	<ul style="list-style-type: none"> • None – they did not exist as such 	<ul style="list-style-type: none"> • Must meet with all customers who intend to enter occupational training • Will interpret assessment results and incorporate them into the customer’s ACP • ACC’s will make the referral to the appropriate education track in collaboration with the customer • ACC’s should work closely with a customer’s case manager 	<ul style="list-style-type: none"> • This assures “right-placement” for individuals, which should result in better retention rates • Correct interpretation and explanation of assessment results for customers • ACC’s are appropriately equipped to have tough conversations with customers

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Adult Education	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Adult education students must be dual-enrolled in both the Adult Education and WorkOne systems • ACCs and case managers should work closely with the adult education administrators and teachers to ensure that customers are making appropriate progress • All customers in adult education must have a case manager • Customers who attain a designated education level must meet with their ACC within a designated number of days 	<ul style="list-style-type: none"> • Dual-enrollment allows for “wrap around” services for this vulnerable population, as well as less chance of losing customer’s information • The more that WorkOne and Adult Education staff communicate, the better off the adult ed student • Once a customer reaches a certain education attainment level, an ACC can help to guide a customer’s consideration of different occupations
Individual Training Accounts	<ul style="list-style-type: none"> • DWD provided a guiding policy in 1998 • Up to the regions to determine details 	<ul style="list-style-type: none"> • Regions/local areas must review in-demand occupations on a annual basis utilizing both “lag” and “lead” data • Maximum ITA amount for one year should not exceed \$4,500. • Supportive services may be an additional amount and should be outlined by regions/local areas • ACC should ensure that students understand any potential financial obligations and encourage students to attend the lowest cost provider 	<ul style="list-style-type: none"> • DWD has an obligation to ensure that customers are aware of the financial obligations that they may be undertaking, but at all times the customer must be able to decide which training provider to attend • Provide consistency across regions in how ITAs are used and the amount of funding available to customers
Follow-Up Post Exiting	<ul style="list-style-type: none"> • At regional discretion 	<ul style="list-style-type: none"> • WorkOne staff must follow-up with each customer who has an ACP after they exit the system • Follow-ups are defined as reciprocal communication between the WorkOne staff member and customer that identifies how a customer is progressing • Additional services should be offered or recommended as appropriate • Check-ins should occur a minimum of once in the quarter immediately after exit and once in the second quarter after exit • As much as possible, case managers should contact their customers • During follow-up, certain information designated by DWD should be collected from customers 	<ul style="list-style-type: none"> • Good follow-up with exited customers has been strongly correlated to higher performance metrics • The data collected would provide “real-time” data for performance metrics