



S P O K A N E  
**WORKFORCE  
COUNCIL**



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## Attachment A

# Co-enrollment & Integrated Service Delivery Handbook for WorkSource Spokane

SWC Co-enrollment & Integrated Service  
Delivery Policy #WS815, Revision 1

March 2019

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## Introduction

In June 2015, seven Local Workforce Development Boards (LWDBs), the Employment Security Department (ESD) and the Workforce Training and Education Coordinating Board (WTECB) adopted the following definition for a pilot to implement an aligned service strategy that includes co-enrollment:

Integrated Service Delivery (ISD) is the delivery of WorkSource services in a manner that aligns/braids the resources of participating partners to seamlessly address the training and employment needs of system customers - job seekers and businesses. ISD utilizes co-enrollment as a tool to reduce duplicative and administrative activities in favor of a positive customer experience. This allows service delivery partners to use their resources for value-added services to assure that job seekers have the skills to succeed in the regional economy. Co-enrolled ISD creates a warm and meaningful welcome and a quick connection to resources. Rather than simply providing a “countable” service, co-enrolled ISD immediately connects the customer to a robust set of high value system resources relevant to the local and regional economy including assessment, skill development, work-readiness, skill validation and certification. Staff working in a co-enrolled ISD environment are organized into teams based on functions, such as intake/assessment or career guidance, rather than to maintain programmatic boundaries. The goal is more people getting jobs, keeping jobs and getting better wages.

In Washington, implementation of ISD with co-enrollment is voluntary with each local area workforce board having discretion on whether to use this model. The Spokane Workforce Council has decided to utilize this model for the WorkSource System in Spokane County. WorkSource Spokane has implemented co-enrollment for all Workforce Innovation and Opportunity Act (WIOA) Title I Adults and Dislocated Workers and WIOA Title III Employment Services (Wagner-Peyser) participants. Co-enrollment into programs from other WorkSource Spokane and WorkSource System programs, such as WIOA Title I Youth programs, Trade Assistance Act, Veteran’s programs/representatives (LVERs and DVOP), WorkFirst, Title II Adult Education and Literacy, Title IV Vocational Rehabilitation, and the TANF and SNAP programs, is encouraged when appropriate for the participant.

## Common Acronyms

- **CFR** – Code of Federal Regulation
- **ESD** – Employment Security Department
- **SWC** – Spokane Workforce Council
- **TEGL** – Training and Employment Guidance Letter
- **WIOA** – Workforce Innovation and Opportunity Act
- **WST** – WorkSource System Tools

## Definitions

- **Basic WIOA Title I Eligibility:** A determination of eligibility for a WIOA Title I-funded program that utilizes self-attestation for documentation of appropriate eligibility criteria, federal reporting elements, and Veteran’s priority of service as defined in Section 6 of SWC Policy WS816, R1 Attachment A – Services & Program Eligibility Handbook. An individual must complete a basic or full WIOA Title I eligibility process for the program in question and be determined eligible to receive basic career services funded by that program.
  - **Note:** Basic WIOA Title I eligibility determination does not apply to Youth programs. All WIOA Youth program services require a full WIOA Title I eligibility determination as defined in SWC Policy WS816, R1 Attachment A – Services & Program Eligibility Handbook.
- **Co-enrollment:** The process of determining eligibility for, and enrollment into, two or more WorkSource Spokane-funded programs for the purposes of delivering basic career services, individualized career services, supportive services, or training services.
- **Full WIOA Title I Eligibility:** A determination of eligibility for Adult, Dislocated Worker, or Youth-funded programs that requires validation beyond self-attestation of appropriate eligibility criteria, federal reporting elements, and Veteran’s priority of service as defined in Section 6 of SWC Policy WS816, R1 Attachment A – Services & Program Eligibility Handbook. Full Adult and Dislocated Worker eligibility also includes assessing need for services beyond basic career services and determination of Adult priority for service

when necessary. To receive individualized career, training, and supportive services funded by an Adult or Dislocated Worker program, or Youth services funded by a Youth program, an individual must complete the full WIOA Title I eligibility process for the corresponding program and be determined eligible to receive such services under that program.

- **Self-attestation** – Self-attestation occurs when an individual, using pre-posed questions with yes/no or multiple-choice options (including date pickers), identifies his or her status for a particular data element and then signs and dates a form acknowledging this status. The form and signature can be on paper or in the state management information system, with a date-stamped electronic signature. For more information, see Self-attestation in section 6 of [SWC Policy WS816, R1 Attachment A – Services & Program Eligibility Handbook \(TEGL 07-18 – Attachment A\)](#).
- **WorkSource System Tools (WST)**: Washington State’s management information system for WIOA programs. WST is comprised of two interconnected systems, Efforts to Outcomes (ETO) for staff and WorkSourceWA.com for job seekers and employers (WSWA).

## References

- [Public Law 113-128, Workforce Innovation and Opportunity Act \(WIOA\) of 2014](#)
- [WIOA Final Rule; 20 CFR Parts 677 and 678; Federal Register, Vol. 81, No. 161, August 19, 2016](#)
- [WIOA Final Rule; 20 CFR Parts 651, 652, and 680; Federal Register, Vol. 81, No. 161, August 19, 2016](#)
- [Public Law 107-288, Jobs for Veterans Act \(JVA\) of 2002](#)
- [Training and Employment Guidance Letter \(TEGL\) 17-05](#)
- [Training and Employment Guidance Letter \(TEGL\) 10-09](#)
- [Training and Employment Guidance Letter \(TEGL\) 11-11, Change 2](#)
- [Training and Employment Guidance Letter \(TEGL\) 11-12](#)
- [Training and Employment Guidance Letter \(TEGL\) 22-15](#)
- [Training and Employment Guidance Letter \(TEGL\) 10-16, Change 1](#)
- [Training and Employment Guidance Letter \(TEGL\) 19-16](#)
- [Training and Employment Guidance Letter \(TEGL\) 07-18](#)
- [ESD WorkSource System Policy 1003, Revision 1 - Data Element Validation](#)
- [ESD WorkSource System Policy 1009, Revision 2 - Priority of Service for Veterans and Eligible Spouses](#)
- [ESD WorkSource System Policy 1019, Revision 4 – Eligibility Guidelines and Documentation Requirements](#)
- [WorkSource Information Notice \(WIN\) 0078, Change 1 – Provision of Title I Follow-up and Supportive Services Before and After Exit for Adults and Dislocated Workers](#)
- [SWC WorkSource System Policy WS816, Revision 1 – Eligibility Guidelines and Documentation Requirements](#)

# 1. ISD and the Workforce Innovation and Opportunity Act

## 1.1. Purpose

WIOA provides the basis for an integrated workforce system. The Act defines a single set of outcome metrics for all federal workforce programs included in the Act. It encourages integration of intake, case management, and reporting systems. It eliminates a “sequence of services” in favor of a workforce system that can meet the unique needs of individuals seeking services.

ISD is a powerful tool for realizing the potential of WIOA by streamlining administrative processes to direct more of the system’s limited resources to value-added customer interactions. By braiding resources and programs provided under WIOA and redefining customer flow and access to services, ISD supports more efficient use of system resources on behalf of job seekers and employers. Co-enrollment, a crucial part of ISD, removes the barriers created by categorical customer eligibility requirements – staff can serve nearly any customer because most customers are enrolled into multiple programs. This manual describes the Spokane WorkSource System’s approach to ISD with co-enrollment.

## 1.2. Alignment with Washington State’s Expectations for WorkSource

[WIOA Title I Policy 5612](#) (One-Stop Certification and Evaluation) describes WorkSource as a seamless customer-focused service delivery network. The principles outlined in the policy apply to the ISD environment and are as follows:

- **Integrated** – Think and act as an integrated system of partners that share common goals with services delivered by multiple organizations with the best capabilities for a seamless customer experience.
- **Accountable** – Committed to high quality customer services with regular program performance review based on shared data and actions that enhance outcomes.
- **Universal access** – Meet the needs of customers by ensuring universal access to programs, services, and activities for all eligible individuals.
- **Continuous improvement** – Create a delivery system that utilizes feedback from employers and job seekers to challenge the status quo and innovates to drive measurable improvements
- **Partnership** – Align goals, resources, and initiatives with economic development, business, labor and education partners.
- **Regional strategy** - Work with counterparts to address broader workforce needs of the regional economy and leverage resources to provide a higher quality and level of services.

## 1.3. Responsibilities of Local Partners in Implementing and Managing ISD at WorkSource Spokane

The SWC, WorkSource Spokane, and all service providers participating in ISD have responsibilities in implementing and managing aspects of ISD. These responsibilities are defined as follows:

### Spokane Workforce Council (SWC):

- Lead ISD at the local level;
- Identify and oversee the WorkSource operator and WIOA Title I service providers;
- Certify WorkSource Comprehensive, Affiliated and Connection Sites;
- Work with partners to increase service integration as appropriate based on community needs and partner resources;
- Negotiate local performance measures;
- Conduct program oversight to ensure appropriate use, management, and investment of workforce resources;
- Provide clarity on local goals for workforce programs and support the necessary professional development to support these goals; and
- Communicate expectations for the implementation and management of ISD.

## Employment Security Department (ESD):

- Administer and oversee WIOA Title III Employment Services (Wagner-Peyser) public labor exchange programs, Unemployment Insurance, Trade Act, WorkFirst, and Veterans Employment and Training programs in Spokane County;
- Provide staffing and infrastructure, including labor market information, customer information management and reporting systems, and facilities for WorkSource Spokane;
- Provide WIOA Title I Adult and Dislocated Worker funded job seeker and business services in coordination with Career Path Services; and
- Coordinate implementation of ISD with co-enrollment at the local level with the SWC and Career Path Services.

## Career Path Services (CPS):

- Act as the local one-stop operator for the Spokane WorkSource Campus and affiliated sites in Spokane County;
- Support the integration of service delivery within WorkSource sites as described in this manual, specifically:
  - Maintain standards and accountability,
  - Promote a consistent, coordinated and quality menu of services,
  - Support communication within and across sites,
  - Deliver staff training across all WorkSource partner agencies;
- Provide WIOA Title I Adult and Dislocated Worker funded job seeker and business services in coordination with Employment Security Department; and
- Coordinate implementation of ISD with co-enrollment at the local level with the SWC and Employment Security Department.

## 2. Understanding ISD with Co-enrollment

ISD with co-enrollment is designed to meet a primary expectation of the workforce system – for staff from multiple programs to serve customers seamlessly, improving the customer experience and outcomes. This manual addresses co-enrollment of WIOA Title I Adults and Dislocated Workers and WIOA Title III Wagner Peyser participants. When as many customers as possible are co-enrolled into these programs, staff funded by these programs can share responsibilities for serving customers more interchangeably.

### 2.1. Title I and Title III Eligibility

Adults and Dislocated Workers under Title I and Employment Services participants under Title III have different eligibility criteria in part related to the services being provided. Employment Services participants must have a legal right to work in the United States. Adults and Dislocated Worker eligibility criteria includes the following:

<b>Title I Adult:</b>
<ul style="list-style-type: none"><li>○ Legal to work, 18 years of age or older; and registered for Selective Service (if appropriate)</li></ul>
<b>Title I Dislocated Worker:</b>
<ul style="list-style-type: none"><li>○ Legal to work, registered for Selective Service (if appropriate) <i>and</i></li><li>○ Unemployed due to general dislocation, facility closure/substantial lay-off, loss of self-employment, displacement as a homemaker, dislocation/separation from military service, or the spouse of an active military service member.</li></ul>






Since most customers are 18 years of age or older, are legal to work in the United States, and are registered with Selective Service (if required to do so), most customers served by Title III funded staff are also eligible for services funded by WIOA Title I Adult. Additionally, many of these customers come to WorkSource because of dislocation from work and potentially qualify for services resourced with Dislocated Worker funds. In a traditional managed enrollment model, only a small portion of eligible customers served by Title III funded staff are enrolled for services resourced with Title I Adult or Dislocated Worker funds. While not all customers are eligible for services funded by all three sources, co-enrolled ISD attempts to screen customers in rather than out.

## 2.2. Services

WIOA identified a common set of career services that must be available to customers accessing the WorkSource system. Career services identified as basic career services must be accessible to all customers seeking employment and training services. Career Services identified as individualized career services must be made available to customers who need these services to obtain or retain employment. WIOA requires coordination in the delivery of career services by Title I and Title III funded staff to assure access for all customers. The Spokane WorkSource System accomplishes this coordination through co-enrollment into Title I and Title III programs.

Training and supportive services are also available to customers accessing the WorkSource system when determined to need such services to obtain or retain employment. While these services cannot be provided by WIOA Title III funded staff, co-enrollment into non-Title III programs will be utilized as needed to provide these services under the Integrated Service Delivery model.

Basic career, individualized career, training, and supportive services are detailed in Attachment C of SWC Policy WS816 R1 – Spokane WorkSource Services Catalog.

## 2.3 Eligibility for WIOA Title I, Enrollment into WIOA Title III, and Service Type

Each category, or type, of service has eligibility requirements that must be met to receive a service under that category. The two types of eligibility determination levels are Basic and Full, described under the Definitions section above. Staff should be aware of an individual’s level of eligibility prior to delivering a service. Staff should also be aware of which category each service falls under according to the Spokane WorkSource Services Catalog. Below is each service category and the eligibility requirements to receive a service under that category:

Basic Career – Informational & Self Service	Basic Career – Staff-Assisted
<ul style="list-style-type: none"> <li>• Informational services do not require WorkSourceWA.com registration.</li> <li>• Most self-services require WorkSourceWA.com registration.</li> <li>• Does not require an eligibility determination.</li> <li>• Can be provided to any customer regardless of their eligibility.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires WorkSourceWA.com registration.</li> <li>• Enrollment into WIOA Title III Employment Services (Wagner-Peyser) occurs automatically.</li> <li>• Must have a Basic WIOA Title I Eligibility determination.</li> <li>• Being determined eligible and enrolled into a WIOA Title I program is not required to receive basic career services. Individuals not enrolled in a WIOA Title I program must be provided basic career services through WIOA Title III Employment Services or another program.</li> <li>• Can be provided to any customer regardless of their eligibility.</li> </ul>
Individualized Career Services	Training Services
<ul style="list-style-type: none"> <li>• Requires WorkSourceWA.com registration.</li> <li>• Enrollment into WIOA Title III Employment Services (Wagner-Peyser) occurs automatically.</li> <li>• Must have a Full WIOA Title I Eligibility determination.</li> <li>• Being determined eligible and enrolled into a WIOA Title I program is not required to receive individualized career services. Individuals not enrolled in a WIOA Title I program must be provided individualized career services through WIOA Title III Employment Services or another program.</li> <li>• Can only be provided to a customer who has been determined to need individualized career services to obtain or retain employment.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires WorkSourceWA.com registration.</li> <li>• Enrollment into WIOA Title III Employment Services (Wagner-Peyser) occurs automatically.</li> <li>• Must have a Full WIOA Title I Eligibility determination and be enrolled in WIOA Title I program or other program that can provide training services (Training services cannot be provided using WIOA Title III Employment Service funds).</li> <li>• Because training services are not available through most fund sources, to receive a training service a customer must be determined eligible for a WIOA Title I program using a full eligibility determination and enrolled or be enrolled in another program that can provide a training service such as Trade Act or WorkFirst.</li> </ul>

	<ul style="list-style-type: none"> <li>• Can only be provided to a customer who has been determined to need training services to obtain or retain employment.</li> </ul>
<b>Supportive Services</b>	<b>Follow-up Services</b>
<ul style="list-style-type: none"> <li>• Requires WorkSourceWA.com registration.</li> <li>• Enrollment into WIOA Title III Employment Services (Wagner-Peyser) does not occur automatically. A basic career, individualized career, or training service must be provided to trigger enrollment into WIOA Title III Employment Services.</li> <li>• Must have a Full WIOA Title I Eligibility determination and be enrolled in a WIOA Title I program or other program that can provide supportive services (Supportive services cannot be provided using WIOA Title III Employment Services funds).</li> <li>• Because supportive services are not available through most fund sources, to receive a supportive service a customer must be determined eligible for a WIOA Title I program using a full eligibility determination and enrolled or be enrolled in another program that can provide a training service such as Trade Act or WorkFirst.</li> <li>• Can only be provided to a customer when necessary to participate in career or training services or when necessary to gain or retain employment.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires WorkSourceWA.com registration.</li> <li>• Enrollment into WIOA Title III Employment Services (Wagner-Peyser) does not occur automatically. A basic career, individualized career, or training service must be provided to trigger enrollment into WIOA Title III Employment Services.</li> <li>• Must have a Full WIOA Title I Eligibility determination.</li> <li>• Being determined eligible and enrolled into a WIOA Title I program is required to receive follow-up services.</li> <li>• Can only be provided to a customer who has obtained unsubsidized employment and who has completed all programs the customer has been co-enrolled into. Follow-up services can be provided for up to 12 months following the last date of basic career, individualized career, or training services.</li> </ul>

## 2.4. Enrollment into WIOA Title I Adult and Dislocated Worker

In a traditional managed enrollment model, relatively few eligible customers are enrolled for services resourced with WIOA Title I Adult or Dislocated Worker funds. Staff must document complicated eligibility requirements, gather various reporting elements, and validate the information gathered. To simplify eligibility determinations, reduce the amount of documentation collected, and improve the customer experience, ISD with co-enrollment aligns eligibility processes to service delivery and utilizes customer self-attestation wherever possible to document and validate eligibility.

The method by which ISD with co-enrollment aligns eligibility processes to service delivery is by separating enrollment into two processes based on the services requested – Basic WIOA Title I eligibility and Full WIOA Title I eligibility. When the intent is to provide basic career services, the Basic WIOA Title I eligibility process is used. When the intent is to provide individualized career, training, and/or supportive services, the Full WIOA Title I eligibility process is used. Under the law and associated regulations, basic career services can be provided under a simplified eligibility determination. This allows customers to begin to access basic career services more rapidly and allows any Title I or Title III funded staff to provide these services to customers in a seamless way.

If a customer enrolled via the Basic WIOA Title I eligibility process would benefit from individualized career, training, or supportive services, staff must complete a Full WIOA eligibility determination to receive these services. A full eligibility determination may be completed at any time.

## 2.5 Co-enrolling WIOA Title I and Title III Participants

A customer who registers on WorkSourceWA.com and receives a staff-assisted career service (basic or individualized) is automatically enrolled in WIOA Title III Employment Services. Co-enrolling these same customers into a WIOA Title I program utilizing the basic eligibility determination creates efficiencies by eliminating the need to collect eligibility documentation for the large numbers of customers eligible for WIOA



Title I funded services. Instead, customers self-attest to their age, selective service registration, and dislocated worker status when completing a basic eligibility determination in the same manner they self-attest to information when they register on WorkSourceWA.com.

Enrollment into both WIOA Title I and Title III is managed in WST. Customers will need to register for services by first creating a Secure Access Washington (SAW) account and then creating a profile on WorkSourceWA.com before co-enrollment can occur. After registration, simply providing a staff-assisted basic or individualized career service in WST will make a customer a Title III customer. Co-enrollment into a WIOA Title I program requires a few additional steps as described in SWC Policy WS815 R1 Procedures – Registration and Enrollment for Basic Career Services Only.

When taking a customer through the co-enrollment process, staff should explain that completing the process is required for the customer to receive assistance through WorkSource and that their responses to the questions asked will in no way effect their eligibility to receive career services (such as resume review, workshops, or UI assistance). If the seeker is asking for training or supportive services, staff should explain that to receive those services a few more questions need to be asked and that eligibility to receive those services is not guaranteed.

Staff should not spend time explaining program eligibility or the differences in programs to customers. Staff should avoid using the term co-enrollment as it has a very specific meaning in this process. Instead, staff should help customers move quickly through the process by keeping questions concise and answers brief. Staff should try to limit questions and conversations to only what's necessary for enrollment and service delivery.

Customers completing the Basic WIOA Title I eligibility process are co-enrolled for the provision of basic career services only. High-quality basic career services will assist the vast majority of customers to achieve their goals of obtaining and retaining employment. Those customers who require more intensive services, such as individualized career, training, and support services, must complete a Full WIOA Title I eligibility determination. A Full WIOA Title I eligibility determination can be done at any time when a customer is determined to need services other than basic career services.

Staff are not required to complete a Basic WIOA Title I eligibility determination prior to a Full WIOA Title I eligibility determination. When appropriate, customers may skip the Basic WIOA Title I determination and go through the Full WIOA Title I eligibility determination.

## **2.6. Program Completion and Exit for WIOA Title I and Title III**

All co-enrolled customers receiving a staff-assisted service become part of the Title III Employment Service exit pool, most will become part of the Title I Adult exit pool, and many will be included in the Title I Dislocated Worker exit pool. Tracking and managing program outcomes for this large volume of customers exiting each program becomes extremely time consuming. Co-enrolled ISD assumes that staff time spent serving customers rather than managing administrative tasks, like recording outcome information, will create benefit for customers and performance will follow. Therefore, staff operating in a co-enrolled ISD model do not manage program outcomes for customers enrolled for Basic Career Services only. Customers are automatically exited from Title I and Title III funded services ninety days after the last service they receive. Outcome information does not need to be collected and entered into WST. If services are requested after program exit, follow-up services may be provided, or the customer may have their eligibility for basic services re-determined as appropriate.

WorkSource staff are expected to manage program outcomes for customers receiving training services and must make available follow-up services to all program completers obtaining unsubsidized employment (including registered apprenticeship) or self-employment for up to 12 months after their last qualifying service.

## **3. Functional Teams**

Part of the ISD framework is a concept known as functional teams. Functional teams are groupings of staff based on functions, such as assessment or career advising, rather than by program or employing organization. Staff are still expected to report to their direct supervisor in the organization that funds their position, but their day to day work is coordinated by a supervisor within the functional team they reside, who may work for a different organization and/or be funded by a different fund source. Functional teams support

increased coordination and collaboration within WorkSource to maximize system capacity and to serve customers more effectively and efficiently. It is critical for those providing services in a co-enrolled ISD environment to embrace a cooperative, functional leadership model so that the capacity, talents and skills of staff can be leveraged for a larger and more diverse population of customers. Staff should utilize their skills in support of common processes and goals, regardless of which agency funds them.

### 3.1 Agency Supervision vs Functional Supervision

Functional teams are led by a functional supervisor, who likely will supervise staff who are employed by their own agency and by other agencies. The table below illustrates how functional and agency supervisors share responsibility for staff supervision. The table does not represent a full list of supervisory or leadership roles and responsibilities in a functional leadership situation. It only illustrates some common differences between the roles of an agency supervisor and functional supervisor. Staff continue to be responsible for reporting to their agency supervisor while keeping functional supervisors and peers informed as part of their cross-functional communication responsibilities.

Agency Supervisor Expectations	Functional Supervisor Expectations
<ul style="list-style-type: none"> <li>• Collaborate with functional supervisors and one-stop operator to ensure strong communication is in place.</li> <li>• Approve work schedules created by functional supervisors.</li> <li>• Conduct performance evaluations and manage staff performance, including improvement plans or redeployment, considering input from functional supervisors.</li> <li>• Hire or terminate staff.</li> <li>• Approve staff vacation and other leave requests.</li> <li>• Approve staff travel requests and reimbursements.</li> <li>• Respond to formal and informal complaints of harassment or discrimination made by or against staff.</li> <li>• Communicate outcomes of any issues involving agency staff with their functional supervisor.</li> <li>• Ensure EEO legal requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaborate with agency supervisor and one-stop operator to ensure strong communication is in place.</li> <li>• Provide guidance and technical assistance to staff.</li> <li>• Organize, maintain and communicate schedule for team staff.</li> <li>• Prepare and provide functional team training for staff.</li> <li>• Create and share reports regarding team activity, including tracking and analyzing services provided by each team.</li> <li>• Forward issues regarding staff to the agency supervisor to resolve.</li> <li>• Provide input to agency supervisor regarding performance evaluations.</li> <li>• Respond to formal and informal complaints of harassment or discrimination made by or against customers.</li> <li>• Ensure EEO legal requirements.</li> </ul>

### 3.2 Common Goals of Functional Teams

Below are common goals to be achieved through the use of functional teams:

- Focus staff expertise on a few specific skills rather than limited expertise on many general skills.
- Eliminate language, processes, and activities that perpetuate program “silos”.
- Develop staff competencies.
- Cross-train staff with common talents and knowledge.
- Provide opportunities for professional development.
- Improve communication and collaboration between different programs and agencies.
- Define staff expectations by function rather than program or agency.
- Defined common terms, processes, and outcomes.

### 3.3 Customer Engagement

Functional teams are designed in ways to provide job seekers and employers with a value-added service as close to the first point of contact as possible. This is where these customers develop their first impression of

WorkSource. Every interaction with a functional team should be a value-added interaction for the customer. Below are components of ISD that help ensure customers have the greatest opportunity to receive a value-added interaction.

### 3.3.1. Customer Flow

Functional teams under ISD organize their space, staff, and processes in ways to reduce customer wait times, eliminate lines, and connect customers to value-added services as quickly as possible. This includes maintaining flexibility with staff coverage to respond to changes in customer volume.

### 3.3.2. Discovery

Discovery is a process adopted by each functional team that helps staff identify a customer’s service needs and employment goal (including employer hiring/service needs) to provide or refer to the right resources. Discovery requires all staff to be knowledgeable about all WorkSource services and which functional teams provide these services. This process also requires empathy without judgement, active listening, and asking appropriate questions to clearly define next steps in the customer’s journey. The results of the discovery process must be documented in WST so that it can be reviewed by other staff as necessary.

### 3.3.3. Priority of Service

Under ISD, service delivery must align with federal law, regulations, and guidance on Priority of Service. Since most customers served by WorkSource staff are co-enrolled in WIOA Title I Adult and WIOA Title III Employment Services (Wagner-Peyser), Priority of Service must be determined for all customers seeking individualized career, supportive, or training services. Priority of service entitles eligible veterans and spouses, individuals who are low-income or receiving public assistance, and individuals who are basic skills deficient, to enrollment and services before eligible non-covered persons.

Customers seeking basic career services are not subject to this requirement. Customers seeking individualized career, training, or supportive services must be assessed to determine their eligibility and priority level. Individuals must be given priority to services in the order of their priority level. The matrix below describes the order and rationale for prioritization based on the requirements in WIOA. For purposes of this section, the term “covered person(s)” refers to veterans and eligible spouses per Section 5 of SWC Policy WS816 R1 – Attachment A.

Priority requirements for enrollment and service delivery are as follows:

Priority	Mandatory Priority Group
First	Covered persons (veterans and eligible spouses) who are recipients of public assistance, other low-income individuals, or are basic skills deficient (see Definitions above).
Second	Non-covered persons who are recipients of public assistance, other low-income individuals, or are basic skills deficient.
Third	Covered persons who are not recipients of public assistance, not other low-income individuals, and not basic skills deficient.
Fourth	Non-covered persons who are not recipients of public assistance, not other low-income individuals, and not basic skills deficient, but who are determined to be in need of individualized career, supportive, and/or training services to obtain or retain employment.

### 3.3.4. Interactive Resource Rooms

Interactive Resource Rooms allow staff to easily connect customers with services and expand the availability of online resources that help customers achieve their goals. Resource rooms provide an ideal opportunity for staff to proactively interact with customers. Staff should still be mindful of those who choose to work independently but be available when customers need assistance and readily offer assistance to new and returning customers.

### 3.3.5. Alternate Access

ISD emphasizes the importance of maximizing access to services for all customers. This could include making services available outside regular business hours, providing services over the phone or by e-mail, providing services at connection sites, and providing services elsewhere out in the community. Functional teams should consider mechanisms that allow staff to be flexible in accommodating access to services for customers where possible and practical.

### 3.3.6. Web-based Technology

Web-based technology is commonplace in the job market. Staff must be ready to help job seekers and employers access user-friendly, web-based technology to the greatest extent possible. These technologies include WorkSourceWA.com and could also include electronic assessments, online learning/certification, and solutions for those with disabilities or other barriers to access. Staff must have the skills to support advances in digital literacy skills, use social media, and accelerate skill acquisition and credential attainment of job seekers.

## 4. Menu of Services

Meeting customer needs requires the availability of an easily accessible and robust menu of services delivered in a variety of formats and designed to support positive labor market outcomes. As a result, ISD with co-enrollment has a greater focus on assessment, skill development and skill certification.

To accomplish this, WorkSource staff and partners will make greater use of online assessments, online training courses and certification exams; recorded workshops or workshops available through web-based technology; and other online services where possible and practical. This requires staff to become more knowledgeable about these options and be able to connect customers to them.

## 5. Continuous Quality Improvement

One of the pillars the ISD model is built on is an expectation of continuous quality improvement (CQI). CQI is managed primarily in three ways: customer feedback, staff/stakeholder feedback, and data analysis. To ensure customer interactions remain value-added, continually assessing and improving customer service delivery and flow is necessary. Staff should continually gather and utilize customer feedback to improve customer engagement.

### 5.1 Customer Feedback

Customer feedback helps drive continuous improvement by soliciting information directly from those who are the most impacted by the services WorkSource provides. Staff are encouraged to utilize as many sources of customer feedback as possible, both formal and informal. Routinely acting on the information they receive creates a culture in which continued evolution better meets the real needs of customers, rather than perceptions about what customers might want.

Sources of customer feedback may include but are not limited to the following:

- **Online customer satisfaction survey:** Shortcuts to online surveys on the computer desktops in resource rooms, kiosks, or classrooms so customers can easily give feedback from computer workstations. Staff should regularly encourage customers to fill these out and assure them that their input and opinions matter and have a direct impact on how services are designed and business is conducted.
- **Traditional customer satisfaction survey:** Copies conveniently located at multiple access points so customers can easily provide feedback. Staff should regularly encourage customers to fill these out and assure them that their input and opinions matter and have a direct impact on how services are designed and business is conducted.
- **Feedback boxes:** A passive and anonymous feedback box, where customers can voice their own thoughts about what needs to be improved, what's working, or anything else that's on their minds.
- **System-wide quarterly survey events:** Proactive survey events of the workforce system (job seekers and employers) each quarter to track trends over time. These events typically occur over a set period of time and are frequently advertised by WorkSource leadership.
- **Customer focus groups:** Convening groups of customers (job seekers and employers) using a specific set of questions to solicit feedback to improve service delivery.

All customer feedback should be reviewed on a regular basis by leadership and staff for consideration and follow-up. This feedback should be utilized to adjust service flows, expand or change resources available, and streamline processes. Any feedback and actions resulting from such feedback should be available for review by WorkSource staff, SWC board members, and other relevant stakeholders.

## 5.2 Staff / Stakeholder Feedback

Staff and stakeholder feedback helps drive continuous improvement by soliciting information from staff and stakeholders of the WorkSource system rather than job seekers and employers. Staff often have perspectives about customer flow and processes from behind the scenes that job seekers and employers are not aware of. Stakeholders often have perspectives about WorkSource and its services from an external viewpoint that may not be apparent to customers or staff. WorkSource leadership is encouraged to utilize as many sources of staff & stakeholder feedback as possible, both formal and informal.

## 5.3 Data Analysis

The ISD model promotes the collection of data not otherwise available in a managed enrollment model. Access to a more robust amount of data allows WorkSource staff to better analyze and interpret information regarding investments in services, changes in customer flows, and organization into functional teams. Examples of how this information can be used are:

- Improve program outcomes and performance,
- Enhance the WorkSource menu of services,
- Improve program design, and
- Accommodate common case management systems.

## 6. Common Outcomes

WIOA provides a common set of outcome measures for Title I and Title III programs. In a traditional managed enrollment model, Title I participation episodes are closely monitored to manage performance outcomes. Under ISD, it is not possible to manage the performance of Title I Adult and Dislocated Worker enrolled participants in the same way that has been done under a managed enrollment model. Staff will no longer be able to manage enrollments and exits for most customers, and therefore should not be concerned about capturing completion data for those receiving only basic career services. This will free staff to focus instead on providing high quality services to customers and employers and connecting more customers to more careers. The expectation is that increased access to staff and services results in better performance.

While staff do not have to capture completion data for customers receiving basic services only, staff are still expected to capture program outcomes for customers receiving individualized career, training, and/or support services and must provide follow-up services to all program completers obtaining unsubsidized employment (including registered apprenticeship) or self-employment for up to 12 months after their last qualifying service.

The common outcome measures shared by Title I and Title III programs are as follows:

WIOA Title I Adult & Dislocated Worker	WIOA Title III Employment Services
For seekers receiving any staff-assisted service	
2 <sup>nd</sup> Quarter Employment	2 <sup>nd</sup> Quarter Employment
2 <sup>nd</sup> Quarter Median Earnings	2 <sup>nd</sup> Quarter Median Earnings
4 <sup>th</sup> Quarter Employment	4 <sup>th</sup> Quarter Employment
For seekers receiving training services only	
Credential Earned	
Measurable Skill Gain	

## 7. Staff Training and Professional Development

ISD requires staff to operate in new ways and to continually update service delivery based on customer input and changing labor market requirements. Finding ways to help customers more successfully access resources, working in functional teams, and jointly assisting customers identify and implement their next steps can be facilitated by on-going training and professional development. Training can be facilitated in

variety of ways, such as in-person, through webinars, and self-paced e-learning modules. Professional certifications can help staff document their knowledge and skills and advance in their careers.

Functional supervisors are expected to regularly develop training opportunities and staff are expected to participate regularly in training. Organizations providing staff to WorkSource are expected to ensure that their staff participate in appropriate trainings.

WorkSource leadership may also promote or require the attainment of specific certifications of staff.

## **8. Communication**

Communication at all levels is crucial to the success of ISD. To share customers and functions, effective and frequent communication is necessary. Communication guidelines for ISD are as follows:

- Transparent and direct communication must be consistently applied to all partners of ISD.
- All staff identify themselves as employees of WorkSource rather than their agency or program.
- Frontline staff are included early in new program or service change considerations and receive timely and consistent communication from WorkSource leadership regarding these changes.