

**WASHINGTON STATE
WORKFORCE TRAINING AND EDUCATION COORDINATING BOARD
MEETING NO. 125
MARCH 27, 2008**

Removing Barriers – A Report from the Interagency Committee

The Workforce Training and Education Coordinating Board (Workforce Board) adopted the Washington Workforce Compact in Bremerton on September 26, 2007. The *Compact* includes the following regarding barrier removal:

Sometimes, the barriers that stand in the way of our customers achieving their goals are of our own making. Not that they are intentional. But sometimes, individual program objectives bump up against the policies or practices of another program in a way that is less than optimal for our customers. For example, the administrative rules of one program may make sense in the context of that program, but when put together with the administrative rules of another program, customers may be faced with conflicting sets of procedures.

The partners to this *Compact* commit to a collective effort to identify and remove government or other barriers that stand in the way of serving our customers. Such barriers may include, but are not limited to policies, practices, regulations, or performance measures. What appear as barriers may exist for a good reason. This must be considered. But we commit to identifying and removing those barriers that don't make sense from the perspective of the goals we are trying to achieve for our customers.

On December 4, 2007, and on December 20, 2007 members of the Workforce Board's Interagency Committee (IC) reviewed comments from over 80 individuals who responded to a statewide barriers survey. Four categories of cross-agency barriers emerged from this study:

1. The Need for Streamlined "Co-Enrollment" Processes
2. The Need for Staff Cross-Training
3. The Value of Co-locating Staff Among Workforce Partners
4. Performance Measures

On January 28, 2008, the Workforce Board received background information on the four barriers. The Board also heard from a panel reporting on recent successes in bringing down cross-program barriers. After discussion, the Board directed the IC to develop actions plans for the four barriers listed above, and to report its progress on March 27, 2008. The IC formed four Work Groups. The Work Groups held initial meetings (except for the Performance Measures Work Group that will be meeting on April 1, 2008). Progress reports are under this tab.

Board Action Required: None. For discussion purposes only.

Co-enrollment Work Group

Work Group Members:

Barbara Korst, WorkSource Operations, Employment Security Department (ESD)
Susan Harris, Employment and Training Division, ESD
Jody Robbins, Apprenticeship Section, Department of Labor & Industries
Darlene Molsen, Bellevue Community College
Susan Cable, Pierce College
Mary Jane Brell, Snohomish County Workforce Development Council (WDC)
Marcy Longosky, Southwest Washington WDC
Tiffany Scott, Benton-Franklin WDC
Lisa Romine and Susan Adams, North Central WDC
Don Kay, Division of Vocational Rehabilitation
Martin McCallum, Facilitator, Workforce Board

The Work Group met on March 11, 2008 for a spirited 2 ½ hour discussion. Here is the draft meeting summary:

Barriers to Co-enrollment

There are numerous deterrents to taking an extra step to co-enroll participants:

- Program-to-program eligibility requirements vary and staff must have the “will” to learn the eligibility criteria of other programs. For example, programs define “low-income” differently.
- There is extra paper work involved in a co-enrollment and there is often a need to re-enter the same (and different) participant information in more than one MIS database.
- Processes to document and later “verify” family income and other data points differ from program to program.
- There is no universal confidentiality process for release of information.
- Data sharing between programs can be problematic.
- Performance measures come over the top of each other - - they can be misunderstood, they can be cumbersome and even conflicting, and there is the threat of loss of control of program results.
- Program counselors are using lean processes to be efficient. Co-enrollment is not a lean process – it is an un-lean process. There are many extra steps needed to put together a co-enrollment opportunity for the customer.
- In the case of youth, there is a dearth of youth programs to connect to.

What it takes to make co-enrollments work

1. In a time of diminishing public service resources, program counselors are becoming leverage counselors. These leverage counselors are asking: “What does the student need?” and they are helping the customer to construct an individual development plan as well as a financial plan. The financial plan assists the customer to connect the dots and this often points to the need for co-enrollment to address otherwise unmet living costs facing the customer throughout the duration of the program.

Example: At Fort Lewis and McChord, there is a new Career Advancement Account program for military spouses offering assistance with books and tuition. The program does not provide supportive services. WorkSource partners in Pierce County have worked out arrangements to establish an office on the base in order to help program participants access services such as Worker Retraining Program, WIA, and Opportunities Grants.

2. At the counselor level, “what it takes to make it work” is for the counselor to: a) be knowledgeable of key linkage points (other programs) in their community; b) adopt a “mindset” to do what is right for the customer (even if it negatively impacts program performance); and c) have the “will” to meet frequently with other workforce and education partners to establish professional relationships. Establishing relationships is putting a face to a name and working together to resolve problems such as overcoming common deterrents to co-enrollments.
3. Co-enrollments depend on staff having a practical understanding of the array of program options in their region that could benefit the customer. This knowledge comes from organized opportunities for staff to network, gain knowledge, and gain trust. A Work Group member said: “The more that staff know about multiple program options the more that customers are served.” Education and workforce program staff in urban and in rural areas of our state are meeting to exchange program information. These local teams are compiling local area reference handbooks such as Pierce County’s Partner Resource and Leverage Opportunity directory, King County’s Inside Scoop, and Chelan County’s cross-program orientation/presentation materials.
4. Co-locating staff among WorkSource partners helps to streamline co-enrollment processes.

Opportunities for more co-enrollments

The Work Group discussed a number of opportunities for increase dual enrollments. Three examples:

1. Temporary Assistance for Needy Families (TANF) case managers develop Individual Responsibility Plans (IRP). Programs identified in IRPs should not be limited to TANF programs.
2. As Adult Basic Education coordinators continue to work with community partners to address the needs of adult learners for support services, they are encouraged to reach out to workforce partners. In this way, students will have greater access to the wrap-around services that are a critical key to retention and progress on education and career pathways. ST. In Tacoma, roofing apprentices are co-enrolled in I-BEST. The roofers are earning while they are learning.
3. As our state moves out of Order of Selection, individuals with disabilities, who are eligible for Division of Vocational Rehabilitation (DVR) services, have a shorter time to wait before DVR services are made available. As timing challenges go away, more co-enrollment opportunities will emerge.

Work Group's Draft Proposals Presented to the Interagency Committee on 3/14/08:

1. Help by state leadership is needed to: a) address the friction and the tension between multiple program performance measures; and b) work toward common program definitions to simplify eligibility.
2. Develop a universal automated referral process.
3. Establish cost sharing agreements between Workforce Compact partners to support regional staff-cross program training plans and training facilitation.
4. Identify flexible gap funding. Beyond the use of co-enrollment to leverage funds, there is a need for flexible gap funding.
5. Develop an on-line desk reference triage tool for use by front line counselors so that they can conveniently review the range of program options that fit the needs of a particular customer. Example: the counselor meets with a displaced homemaker. The counselor selects Displaced Homemaker Program from an on-line program directory list. The first web page opens provides an overall program summary including basic program eligibility information. To localize it, the counselor would then click to the next page to identify the nearest Displaced Homemaker Program office location and contact person.
6. Encourage each local service provider to identify what their organization does well, identify where the key leverage points are, co-enroll where it makes sense, do it locally, build cross-program professional relationships, serve as a fair broker by sharing a laundry list of program options with the customer, and assist customers to develop both an education plan and a financial plan that connects to a career path.

Proposed Work Plan

1. The Work Group members will meet in April to review its draft proposals and recommend priorities. Work Group members will confer with field staff, analyze the information and propose next steps. The Work Group will present findings to the IC on April 30, 2008.
2. Between April 30 and June 30, 2008, IC members will prepare an action plan for the Workforce Board's consideration at its July 10, 2008 meeting in Seattle.

Staff Cross-Training Work Group

Work Group Members:

Terri Colbert, Facilitator, Workforce Board
Carl Johnston, Division of Vocational Rehabilitation
Ken Kelnhofer, Employment Security Department (ESD) WorkSource Operations
Martin McCallum, Workforce Board
Joanne Murcar, Institute for Extended Learning, Community Colleges of Spokane
Kristin Ockert, State Board for Community and Technical Colleges (SBCTC)
Janine Quinichett, representing local Community and Technical Colleges
Jody Robbins, Department of Labor and Industries - Apprenticeship
Tiffany Scott, Benton Franklin Workforce Development Council (WDC)
Brandi Stewart-Wood, Southwest Washington WDC
Holly Watson, ESD Employment and Training Division

This Work Group met on Monday, March 10, 2008. Partners came to this meeting with a willingness to participate, resulting in a rich discussion of viable opportunities, and agreeing that it is imperative to make cross-training a priority. During the discussion it became clear that while training is being done to some degree by all of the partners, more must be done to effectively and efficiently serve customers. Because policies, rules, and personnel are not static, training must be on-going and should be multi-dimensional. Training should be current, flexible, and be provided through a mix of on-line and face-to-face venues. Training should bring both in-depth understanding of programs and requirements, and brief updates on changes as they come about.

Committee members shared a variety of approaches as potential staff cross-training options. Brandi shared information about Clark Southwest Washington WDC's Workforce 101, which is a mini-curriculum that provides local providers with basic information on programs. Janine brought along a copy of the desktop reference notebook that King County partners have put together as an at-a-glance resource tool. Because scheduling is a challenge, the committee quickly concluded that training must be accessible to staff at times that worked within their schedules.

Work Group's Draft Proposals Presented to the Interagency Committee on 3/14/08:

1. Cost-sharing among Workforce Compact Partners to fully fund:
 - Development of regional training plans
 - Facilitation of local, staff cross-training sessions
2. Name a state/local Training Team who would be responsible for:
 - Reviewing and supporting regional training plans
 - Identifying and sharing best practices in staff cross-training
 - Assuming responsibility for a "communication tree" for information on changes to policy, rules, or programs, as they occur
3. Develop an automated resource where client information can be entered, triggering a menu of on-line links to potential programs (along with local contact information for the client)

4. Sharing best practices of local and regional staff cross-training during the annual Workforce Leadership and the Building Skills Conferences

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In no particular order, the following bulleted items are the list of ideas discussed by the staff cross-training committee:

- Each region should have a funded training plan
- Develop a clearinghouse of rules and policies; each region should identify a contact who is the lead for gathering and “broadcasting” new policies and rules that affect client services
- Policies are not necessarily intended to be a barrier – often the interpretation of the policy becomes the unintended barrier
- It'll be necessary to understand the cultures and performance measures of the various partners
- The training action plan that is developed as a result of this effort must become part of the culture to ensure that this plan is shared, is followed-up, and is sustainable
- Provide Train-the-Trainer where appropriate
- Taking the training to the site/location is an effective method of delivery
- Provide more than one session of training, allowing staff to register for the session that best fits their availability/schedule (Multiple sessions/multiple locations)
- Provide a desk-top reference (“At-a-Glance”)
- Can or should staff cross-training be part of the certification/re-certification process?
- E-Training might be used for a basis of statewide training (something new employees could access to bring them up-to-speed) – as a supplement to face-to-face training options
- The partnership and face-to-face training is imperative to build the trust and personal relationships
- On-line training academy
- Identify best practices or promising practices
- Have a statewide training committee – this committee would work with partners in each Workforce Development Area to identify best practices – these would then be shared within an annual conference
 - Committee would set criteria for “best practices”
 - Best practices should have flexibility for regional adaptation
- Provide a layered approach to training – A Workforce 101 approach that provides
 - State-level (partnership training; train-the-trainer; policy updates; performance measures)
 - Regional-level (customized; regional partners)
 - Local-level (customized; local partners)
- “Show me the Money” – funding support for cross-training of staff is a must

- Varied learning venues, i.e., job site, college site, apprenticeship site
- Universal referral form
- Remember “shoe box programs” – those programs that are so small they don’t have staff to go out to cross-train, yet have need for professional development and knowledge of partner offerings
- On-line newsletters
- Develop some kind of a trigger that is linked to a training action (newsletter update, e-alert, etc.) so that when there is something new that affects clients or how business is handled, that information has a way of being quickly disseminated.
- Performance Measures –
 - Can get in the way of client referrals
 - Enrollments and budgets can often be the guide to services
 - Sacrifice higher measures in exchange for being service-driven

Co-Location Work Group

Work Group Members:

Carolyn Cummins, State Board for Community and Technical Colleges
Janine Quinichett, representing local Community and Technical Colleges
Kathy DiJulio, Office of Integration, Employment Security Department
Cheryl Boldt, WorkSource Operations, Employment Security Department
Dennis Birge, Employment and Training Division, Employment Security Department
Dorothy Bristow, Kitsap WorkSource, Employment Security Department
Erin Mundinger, Omak WorkSource, Employment Security Department
Martin McCallum, Workforce Board

A major strategy to efficiently serve customers of multiple programs is to co-locate staff from the programs at each other's location. A prime example of co-location is the placement of Employment Security WorkSource staff on community and technical college campuses, and the co-location of college staff at WorkSource sites. The Employment Security Department ended funding for co-location on July 1, 2004. The State Board for Community and Technical Colleges currently funds this function at \$23,800 per year per college, which is insufficient to carry even a part-time staffer. Individuals, responding to the barriers survey, recommended barrier removal by reinstating funding for co-location. Survey respondents reported a "high value" on the streamlining of services created through co-location.

Committee's Proposed Work Plan

The Work Group will conduct the following assessment and analysis to determine a resolution for the barrier. Following a workgroup meeting on March 20, 2008, leads will be established for tasks outlined below:

1. Estimate the facility and staff costs for co-locating WorkSource staff at community colleges and co-locating community college staff at WorkSource sites. Present findings to the IC in May, 2008.
 - a. Clarify with field staff the core nature of the need for co-located staff and/or services (drill into more detail based on barriers survey).
 - b. Conduct an assessment of the locations, numbers, reasons, and types of co-location models currently in place between the two entities.
2. Analyze the information obtained above and determine next steps and present to Interagency Committee in June 2008.
3. Obtain stakeholder and customer feedback on findings through targeted interviews or surveys and present to Interagency Committee in July 2008.
4. Based on the findings and feedback, draft recommendations to the Interagency Committee and the Workforce Board for the September 2008, Board meeting.