



Service Integration: An Overview



ILLINOIS WIOA SUMMIT

Workforce Innovation and Opportunity Act

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What We'll Cover

- **Context** for service integration
- **Content** of the IWIB's service integration policy
- The WINTAC Integration **Self-Assessment and Strategic Service Alignment** process
- Video clips from WINTAC's "**Finding Integration Tour**"
- National innovative service alignment practices related to the **IWIB's Service Integration Goals**
- **Lessons Learned** on service integration



Service Integration is a Federal and State Priority

Federal Legislation: WIOA requires collaboration among partner programs and entities jointly responsible for workforce, economic development, educational, and other human resource programs to create a seamless, customer-focused one-stop delivery system that integrates service delivery across all programs and enhances access to services.

WIOA Unified State Plan: Describes how the State will develop and implement a unified, integrated workforce development system. Local employment and training services must be coordinated and complementary among the partners.

IWIB Strategic Plan Principles:

- “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”



Why Service Integration is Important

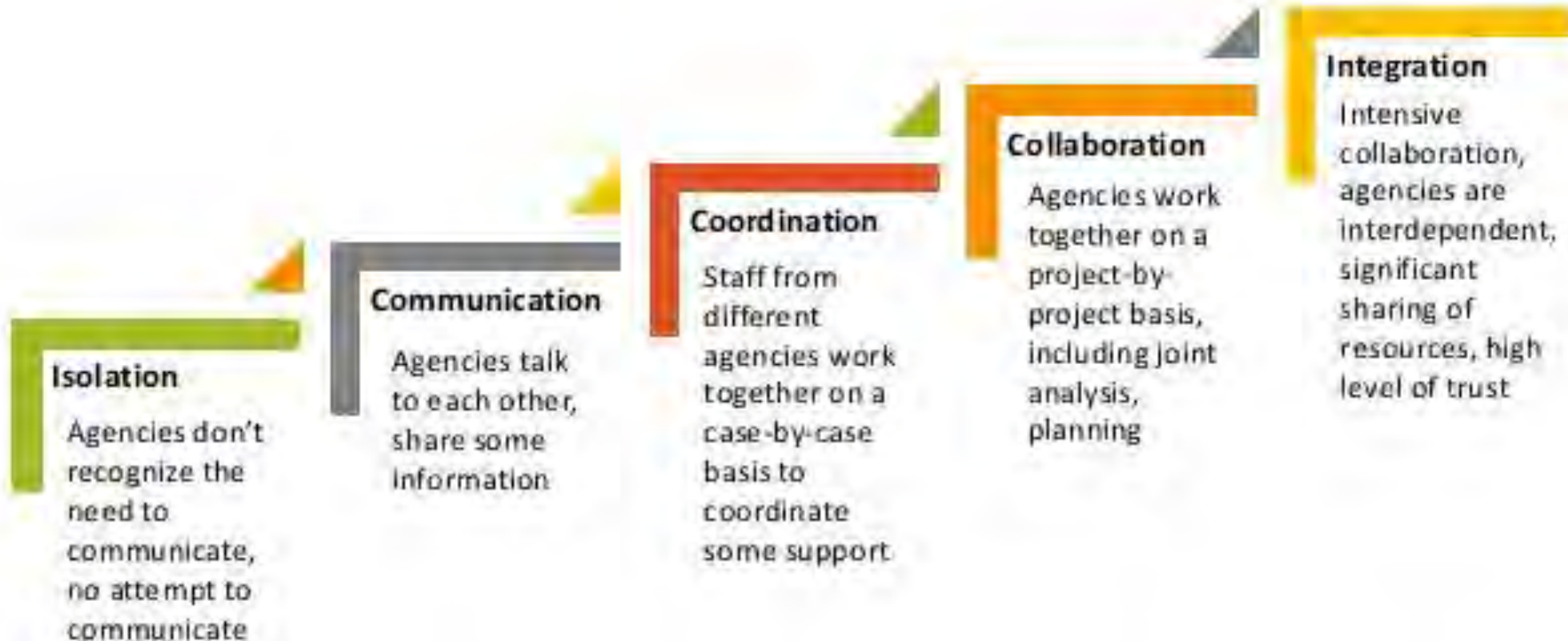
- All one-stop centers must deliver 6 core programs and provide access to another 12 partner programs; local boards may include additional partners
- Service integration is essential to providing excellent customer service to job-seekers and employers
 - What policies need to be aligned or adopted to enhance the customer experience?
 - Where can we economize scarce resources?
 - How do we design or change specific programs and services to create seamless service delivery?
- Steps to integrate services
 - Replace silo focus with functions
 - Minimize redundancy
 - Streamline common services such as intake



The IWIB's Approach to Service Integration

- Service Integration Policy Work Group formed in August 2017
- 28 members representing the IWIB, local workforce areas, community-based organizations, core WIOA partners, post-secondary education
- Input from 298 frontline workers through an online survey
- **Concluded service integration is systems change – it will look different in each Local Workforce Area and One Stop Center**

WINTAC Service Integration Continuum



Burt and Spellman, (2007). Toward Understanding Homelessness: The 2007 National Symposium on Homelessness Research. *Changing Homeless and Mainstream Service Systems: Essential Approaches to Ending Homelessness*. U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation

What the Policy Includes

- A definition of service integration
- The service integration functions, goals, and outcomes all Illinois local workforce areas and one-stop centers must address to be certified
- Process by which LWIBs pursue and document progress toward service integration
 - Self-assessment (based on the integration continuum model) that informs local and regional planning
 - One-stop certification process
 - Local and regional planning
 - Training and technical assistance
- *Access the policy through Illinois workNet's ePolicy portal*

Service Integration Defined

A process to **align and simplify access** to one-stop center services and supports for employers, job-seekers, and system **customers** to provide the best experience possible. Service integration may occur across entities delivering specific services or programs; **across time** as customer needs change; or both.

Service Integration Components

Addresses functions, goals and outcomes:

1. Customer-centered design
2. Staff
3. Intake and assessment
4. Services
5. Career pathways
6. Information
7. Evaluation

1. Customer-Centered Design

- **Goal:** Partners use customer input to design and deliver integrated services to all customers
- **Outcome:** One-stop services are shaped by customer needs and preferences

2. Staff

Goals:

- Competencies, values, and performance expectations are communicated to staff
- Cross-training and program resources are made available
- Regular communication occurs across partners
- Staff treated as valued and respected team members

Outcome: Create a culture of accountability

3. Intake and Assessment

Goals:

- Customers provide basic information once
- Staff collaborate in holistic customer assessments

Outcome: Customer needs are quickly and accurately identified

4. Services

Goals:

1. Services are delivered by function rather than program
2. Processes are streamlined and aligned
3. Service plans are “living documents”
4. Customers receive timely and coordinated access to services

Outcome:

All customers are provided access to quality integrated services that meet their needs efficiently and seamlessly

5. Career Pathways

Goal: Illinois residents progressively build toward college and career success through aligned education, training, and employment opportunities over their lifetimes.

Outcome: One-stop services are shaped through the lens of career pathways.

6. Information

Goals:

- Managers and staff share information on programs and services received by customers subject to confidentiality requirements
- Current and timely labor market information informs career planning and sector initiatives

Outcome:

- Staff have access to a range of information enabling them to provide excellent customer service

7. Evaluation

Goal: State and local workforce board expectations drive evaluation of one-stop service integration.

Outcome: Local service integration efforts are evaluated regularly to identify continuous improvement opportunities.

One-stop Certification and Service Integration

- These goals and outcomes being incorporated into the one-stop certification process to take effect July 1, 2020.
- Self-assessment tool developed using integration continuum
 - Collaborative process to establish a baseline in all 7 areas
 - Helps identify improvement opportunities
 - Administered annually
- LWIBs responsible for implementation – self-assessment, certification, planning for continuous improvement

Implementation Milestones

- Service integration policy took effect January 1, 2019
- Self assessment guide prepared, roll-out in May 2019
- One-stop certification process being revised to reflect service integration, effective July 1, 2020
- WIOA Summit on Service Integration – April 23-24, 2019
- Self-assessment baseline one-stop self-assessment to be completed by September 30, 2019
- Service integration priorities in regional/local plans – March 1, 2020

WHAT IS WINTAC?

- A national center funded by the Rehabilitation Services Administration to provide technical assistance to State Vocational Rehabilitation Agencies, their partners, and related VR professionals to help them develop skills and processes needed to meet WIOA requirements. www.WINTAC.org



INTEGRATION EXAMPLE



Search

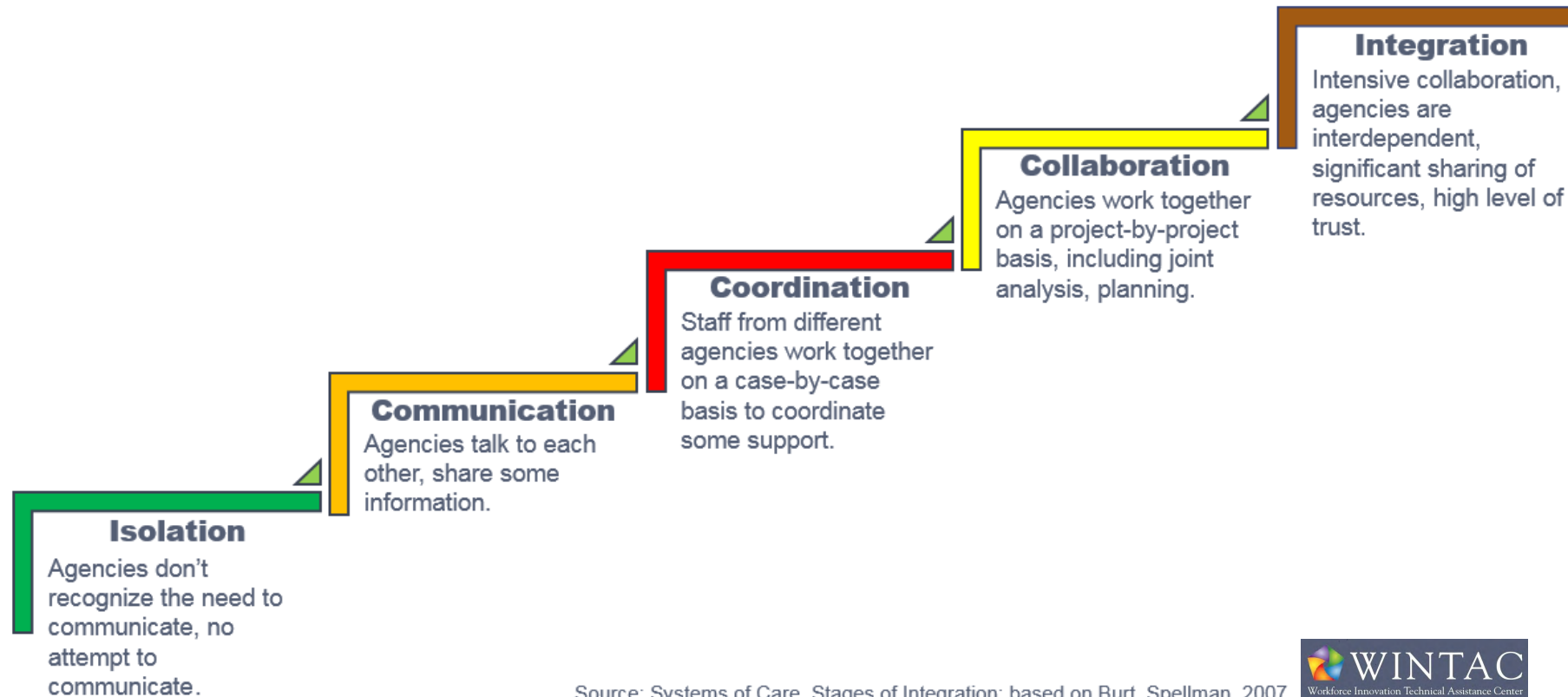


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INTEGRATION CONTINUUM SELF ASSESSMENT



Source: Systems of Care, Stages of Integration; based on Burt, Spellman, 2007.

BENEFITS OF INTEGRATED SERVICES - CUSTOMERS

- **Expanded workforce services** for individuals at all levels of skill and experience
- **Access** to multiple employment and training resources.
- **Integrated and expert intake process** for all customers entering the American Job Centers
- **Integrated and aligned business services** strategy among American Job Center partners.
- **Ensures relevance** to labor market conditions to the local area
- **Seamless services for the common customers** served by multiple program partners of the American Job Center

BENEFITS OF INTEGRATED SERVICES - PARTNERS

- **Economize** scarce resources
- **Enhance** job seeker/claimant/customer outcomes
- **Promote** more effective services to employers
- **Boost** data availability
- **Improve** performance accountability
- **Expanded** community and industry outreach.

CURRENT – DESIRED

Case Management

HUMAN CENTERED DESIGN

CASE MANAGEMENT	ISOLATION			COMMUNICATION			COORDINATION			COLLABORATION			INTEGRATION		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
✓ Level of Integration Current – Desired							✓	→			✓				
Capture any examples shared in the discussion. <ul style="list-style-type: none"> Individual agencies have their own case management system. Co-enrolled individuals have this priority. No shared system Some updates are shared informally but not regularly – dependent upon staff member's motivation to share. 															
Capture any ideas/opportunities group members share. <ul style="list-style-type: none"> Triage customers Create warm hand-off Increase awareness of services Interface for basic client information Case Management based on informal relationships – formalize a process Pilot target group of 10 customers who are co-enrolled; what would shared Case Management look like? Alignment of services Shared emails (cc:) Sharing of case management of those co-enrolled 															
Note any questions, concerns, and/or areas for assistance. <ul style="list-style-type: none"> Need for capability to share information with MOUs, confidentiality waivers/consent and ideally sharing between case management systems 															



ACTION PLANS

TEAM ACTIVITIES & OUTPUTS				
Activities	Lead	WINTAC	Outputs	Notes
Business Engagement (BE)				
Establish Team Leaders	VR local Workforce leadership	Lou Adams	Team leaders identified	
Conference call with Team Leaders to review roles and responsibilities for Team Leaders, WINTAC and Team Members.	BE Team Leaders	Lou Adams Russ Thelen	Review action plan, select team members, agenda and schedule for team meetings	
Develop Regional Core Teams	BE Team	Lou Adams Russ Thelen	Establish vision and charge to the Regional Core Teams, identify activities. Select (with leadership) membership	
Employer Forums (Regional)	Regional Core Team, SHRM	Russ Thelen and Lou Adams	Develop means to reduce duplication and document changes annually and ...	
Facilitated planning with business reps of all agencies together to develop a shared business service needs assessment	BE Team and Regional Core Team, others as needed	Russ Thelen and Lou Adams	Business representatives trained on the purpose and use for the business service needs assessment. Track instances of use and results of the business service needs assessment.	
Comprehensive materials about Business Services	BE Team and Ty Robinson	Lou Adams and Russ Thelen	Develop and use of joint marketing materials for businesses; use and tracking of impact of marketing materials	

STAFF GOALS

- State-level Leadership Team of Core and Required Partners
- Joint Training on **Integrated Resource Teams**, Career Pathways and Business Services Needs Assessment
- AJC Partner Staff Job Shadowing Each Other to Learn Their Services and Service Delivery Approaches
- WIOA Wednesdays
- **No Assumptions**

INTAKE AND ASSESSMENT

- **Iowa** – Common intake for each person registering at AJC
- **Mississippi** – Developing a **six questions**-based common intake form and an information hub. Triggers referrals
- **Montana, Nebraska, Virginia** - Data elements from a **Universal Intake Form** uploaded to server [in development]. Triggers referrals
- **Assessments** – Early efforts underway

SERVICE GOALS

- AJC Staff determine how the **expertise of each partner is engaged in real time** to address customer needs (function vs. program)
- **Career Index Plus** – a Career Information System that collects labor market information (LMI) from a host of resources and deposits it onto a single, user-friendly site. Access is free and the data is the most recent available.
- **Training staff** to use LMI as an essential part of service planning

INFORMATION

- Local leadership sets a tone for service alignment
 - In demonstrating respect for the expertise of each of the partner service specialists
 - Maintaining an expectation that all will assume leadership in service as customer needs demand
- The **Career Index Plus** – a free career information system that collects LMI from a host of resources
- Training staff to use LMI as an essential part of service planning
- **Sector-based** focus

CAREER PATHWAYS

Career Pathways

- Incorporating adults into career pathways is just beginning in several states.
- Locally AJCs are working with business, education and core/required partners in identifying **credentials** that correspond to the skill needs of local employers in high-demand industry sectors

Best Practices...

- Identifying the skills that are needed for local high-demand occupations
- Determining how adults are deemed proficient in these skills
- Identifying the credentials that employers value
- Providing work-based learning opportunities for adults when relevant

EVALUATION

- **MOU Documentation of Approach** to integrated services plans
- **Ongoing adjustment** in the local service model through regular meetings with partners
- Capturing the **customer voice**
- Common performance measures local monitoring and improvement

LESSONS LEARNED - COLLABORATIVE STATE LEVEL TEAM

- Sets the vision with **clear expectations**
- Develops and reviews guidance with local boards and agency collaboration including the quality of the customer's experience
- Collaboratively supports the local partners – monitoring progress, providing guidance and assistance – **solution finding approach, not a “gotcha” exercise**
- Addresses challenges that local leadership raise with a designed *feedback-response* loop.
- Corrects misinformation and responds to local procedural barriers

LESSONS LEARNED - LOCAL LEADERSHIP TEAMS

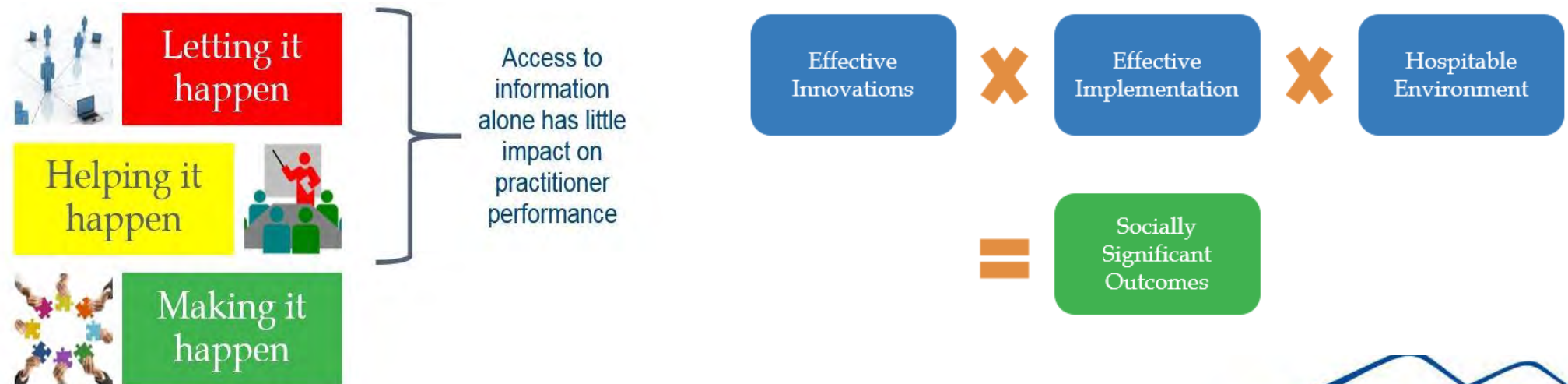
- Makes it **real**
- Establish a regular process for partner leadership to address
 - Customer experience
 - Service impact
 - Collaborative processes
- Discuss how the **expertise of each partner** is engaged in real time to address customer needs
- **Jointly** review the relevance of the career services – career pathways

LESSONS LEARNED - STAFF

- Local leadership is key to staff collaboration
- Customers benefit from more resources and partners have resources
- Customers have similar challenges across funding streams
- Joint involvement in service design fosters collaboration in service provision
- Cross-training is essential but not sufficient – working together on mutual customers solidifies and understanding of the possibilities

LESSONS LEARNED IMPLEMENTATION

- Implementation is a science and an art unto itself
- Good ideas and detailed plans are not enough



QUESTIONS AND ANSWERS

