JTED TA Review Cover Letter and Interview *(9/21/2022)*

Contents

Before the Technical Assistance Meeting

Cover Letter to send Grantee for a Technical Assistance Meeting

Header

Name
Date
Company
Address 1
Address 2

Dear Salutation Last Name:

JTED TA Review Cover Letter and Interview *(9/21/2022)*

Thank you for your participation as a JTED Grantee. *Lead Name* has been assigned as JTED grant manager for your organization. The services that you offer through the program provide the skills our customers need to put them on a path to self-sufficiency. As we move forward with the program, we will be conducting desk reviews and providing technical assistance site visits. The purpose of this letter is to set up an on-site technical assistance review on (Date) that includes the following functions:

- Desk Reviews – JTED staff will complete desk reviews of current customers one week prior to your Technical Assistance Review, and additional review as deemed necessary. This review uses information from the online system and will include between 5-8 participants. Additional case files may be randomly selected for review during the site visit. This desk review will be referenced during the on-site technical assistance visit.
- Technical Assistance Review – Scheduled in-person or remote reviews will occur at least once, unless additional visits are deemed necessary. The purpose of the review is to ensure that services are being provided based on the approved grant and related policies and procedures. An in-person/remote review may take up to six hours and will include:
    - Case file review, including the desk audit and randomly selected case file reviewed during the site visit;
    - Service delivery observation of recruitment, intake/orientation, assessments, workshops, supportive/barrier reduction services, training, case management;
    - Staff, customer, training providers, and worksite employer's interviews.

Upon the completion of the review process, a Technical Assistance Summary Report will be completed and will include ratings, observations, best practices, follow-up items, and due dates. A copy of the report will be sent to you so that any necessary remedial action can be implemented.

On (Date) our technical assistance staff will be meeting with your staff. So that we may make the most of our time together, please review the resources and pull together the documentation identified in the table below. As you review your scope of work, you will need to contact _______________ to discuss the appropriateness of a modification if changes have been made to the services provided, but not updated in your grant agreement. ***IMPORTANT NOTE: If this is an in-person visit, a computer with internet access is required. The meeting should take place in a conference room that can accommodate multiple staff and allow a maximum view of the screens, if available.***

Additionally, the attached draft agenda will need to be completed by the Grantee and sent back to the JTED grant manager five business days prior to the scheduled meeting.

Component	Have the Following Resources & Required Documentation Available
1. Scope of Work. The scope of work in your current executed grant agreement should reflect the actual services you are providing	• Current scope of work from the approved grant agreement • Related vendor/worksite contracts and/or agreements
2. Outreach	• Outreach materials and approaches
3. Intake	• Types of Assessment used • Rights and responsibilities with the Grantee
4. Service Delivery Process	• Internal process engagement documentation • Supportive/Barrier reduction service policy
5. Training, Work Experience, and Employment	• Attendance documentation • Syllabus • Evidence of Approved Industry Recognized Credentials • Verification of employment (e.g., paystubs, work number)

JTED TA Review Cover Letter and Interview *(9/21/2022)*

Thank you for your participation in the JTED program. We look forward to our visit with you.

Sincerely,

JTED Grant Manager Name
JTED Grant Manager Title

Agenda for Technical Assistance On-site Visits

Complete the following agenda and return it no later than five business days prior to the scheduled visit to your JTED grant manager.

Grantee:
Date:

Time	Agenda Item	Name of person(s) to interview or be included	On-site address (if applicable)
	On-site/Remote Interview with Grantee Staff on: *(allow 4 hours)* ● Case File Review ● Intake ● Training/Employment Services ● Exit Status/Follow-Up	*(Grantee Staff Member(s) who utilize the online system)*	
	● Training Customer Interview *(allow 1 hour)*	*(Add Customers workNet ID# - If available, use customers from the desk audit.)*	
(allow travel time if traveling to a different site)	● Work Experience Employer Observation/Interview *(allow 1 hour)*	*(Worksite Employer that works with the JTED customers)*	
	Exit Interview *(allow 30 minutes)*	Grantee Team & State Team	

Partner On-site Interviews:

Step 1 - Setup Results Sheet

On-site/Remote Meeting Intro/Script for the Setup Section

We are going to start by talking about the Setup process. I have some discussion questions that we will go through, and I will take notes to document your processes, best practices, challenges, and overall feedback. During our time together, I will share best practices with you as well as correct any documentation, and identify any items that could potentially result in a finding. We will go over forms and internal policy when applicable.

Setup Staff Results Sheet

* JTED Procedures Manual

Items that need immediate corrective action have 1 week to respond and all others take 30 days.

Interview Questions:	References/Potential Outcomes	Other Participant ID	Indicators for Technical Assistance
Ask the career planner/navigator the following questions to document their process & assess their knowledge of partner tools & policy.	*Use the following to clarify policy, instructions, and expectations.* *The potential outcomes could be:* • *Management Recommendation* • *Observations based upon JTED procedures*	*The workNet ID# is listed on the left-hand column in the customer profile.*	*Use the following instructions as guidance for making notes and documenting the Grantee's response in the results section. Have the Grantee demonstrate their knowledge by navigating and using the system to support their responses. Document the customer's workNet ID# and results (are they documented properly) in the results sheet.*
Does the staff have an Illinois workNet account with proper access to the Illinois workNet tools?	**Instructions/Guidance:** • Become a Partner and Requesting Access to Partner Tools (PDF) **Related Procedures:** * Procedures Manual (PDF): Chapter 10 - Illinois workNet **Potential Outcomes:** • Management Recommendation **Setup Rubric Meets Standards Definition:** • Staff contact information is accurate.	*N/A*	**Notes:** **Rating:** **Follow-up:**

Interview Questions:	References/Potential Outcomes	Other Participant ID	Indicators for Technical Assistance
	● Staff are connected with the correct partner organization. **Discussion Points:** ● Update partner information in the User Management tools.		
Is Grantee Detail information complete?	**Instructions/Guidance:** ● Grantee Details the Customer Support Center (PDF) (Video) ● Add Training Programs (PDF) (Video) ● Enter Worksite Placements (PDF) **Related Policy/Procedures:** N/A **Potential Outcomes:** N/A **Setup Rubric Meets Standards Definition:** ● Grantee information is accurate. **Discussion Points:** ● This information is in the Provider tab in Illinois workNet. Grantee information goes in the Grantee Details tab. ● Grantees do not have access to all the fields. The remaining fields are completed by Commerce. ● Grantees can use the case notes in this section to send an email to the grant manager(s). This creates a record of the conversation with all the grant information. ● Grantee Detail tab provides a summary of the grant information, programs, worksite placement, etc.	*N/A*	**Note:** **Rating:** **Follow-up:**
Does the description accurately reflect your	**Instructions/Guidance:** ● Adding Training Programs (PDF) (Video) **Related Procedures:**	*N/A*	**Notes:** **Rating:**

Interview Questions:	References/Potential Outcomes	Other Participant ID	Indicators for Technical Assistance
training programs offered through JTED (as identified in your grant agreement)?	* Procedures Manual: Chapter 2 - Program Categories (PDF) Chapter 5 - Sector-Based Learning & Work-Based Learning (PDF) **Potential Outcomes:** ● Management Recommendation **Setup Rubric Meets Standards Definition:** ● Add training Program - The following components are accurately described/identified: o Description o Provider information o Related Career Pathway Information o Program delivery o Credentials earned o Expected outcomes o Work experience **Discussion Points:** ● This information is in the Provider tab in Illinois workNet in the Training Program tab.		**Follow-up:**

Interview Questions:	References/Potential Outcomes	Other Participant ID	Indicators for Technical Assistance
Does your training program information include secondary, post-secondary, and/or industry-recognized credentials earned through this grant?	**Instructions/Guidance:** ● Adding Training Programs (PDF) (Video) **Related Procedures:** * Procedures Manual: Chapter 5 - Sector-Based Learning & Work-Based Learning (PDF) **Potential Outcomes:** ● Management Recommendation **Setup Rubric Meets Standards Definition:** ● Credential is provided or offered through the authorized body and directly related to the training program. ● Credential name uses the standardized naming convention. ● Program prepares customers to earn the credential. **Discussion Points:** ● This information is in the Provider tab in Illinois workNet in the Training Program tab. ● Credentials are entered with the training program information.	*N/A*	**Notes:** **Rating:** **Follow-up:**
Have you entered your worksites? **Are the worksites related to the career pathway?** **Do you have an established point of**	**Instructions/Guidance:** ● Enter Worksite Placements (PDF) **Related Procedures:** * Procedures Manual: Chapter 5 - Sector-Based Learning & Work-Based Learning (PDF) **Potential Outcomes:** ● Management Recommendation **Setup Rubric Meets Standards Definition:** ● Worksite placement MUST be related to the career pathway. ● Worksite placements are entered into Illinois workNet.	*N/A*	**Notes:** **Rating:** **Follow-up:**

<table>
<tr><th>Interview Questions:</th><th>References/Potential Outcomes</th><th>Other Participant ID</th><th>Indicators for Technical Assistance</th></tr>
<tr><td>contact with the worksite placement?</td><td>Worksite placement point of contact in Illinois workNet is accurate.
Discussion Points:
If Worksite placement point of contact is not established, reference employer outreach below.
Worksite placements are used to populate customer Illinois workNet Career Plan steps. If they are in the system prior to completing customer career plans, the process flows smoother.
The first two numbers of the SOC code in the worksite placement should match the first two SOC code numbers in the related training program. If not, an explanation will be required to describe how the experience is related to the training.</td><td></td><td></td></tr>
<tr><td>Are the worksites initial on-site evaluations and agreements uploaded into the system?</td><td>Instructions/Guidance:
Enter Worksite Placements (PDF)
Related Procedures:
* Procedures Manual: Chapter 5 - Sector-Based Learning & Work-Based Learning (PDF)

Potential Outcomes:
Management Recommendation (Grantee must have a hard copy on file and/or uploaded into the system.)
Setup Rubric Meets Standards Definition:
Each site has an initial site assessment.
Each site has a signed worksite agreement.
Discussion Points:
If they are not uploaded in the system, are they in the customer's file?</td><td>N/A</td><td>Notes:

Rating:
Follow-up:</td></tr>
</table>

Step 2 - Outreach Results Sheet

On-site/Remote Meeting Intro/Script for the Outreach Section

We are going to talk about the Outreach process. I have some discussion questions that we will go through, and I will take notes to document your processes, best practices, challenges, and overall feedback. During our time together, I will share best practices with you as well as correct any documentation and identify any items that could potentially result in a finding. We will go over assessment information, forms, internal policy, and customer handout examples.

Outreach Staff Results Sheet

* JTED Procedures Manual

Items that need immediate corrective action have 1 week to respond and all others take 30 days.

Interview Questions:	References/Potential Outcomes	Other Participant ID	Indicators for Technical Assistance
Ask the career planner / navigator the following questions to document their process & assess their knowledge of partner tools & policy.	*Use the following to clarify policy, instructions, and expectations. The potential outcomes could be:* • *Management Recommendation* • *Observations based upon JTED procedures*	*The workNet ID# is listed on the left-hand column in the customer profile.*	*Use the following instructions as guidance for making notes and documenting the Grantee's response in the results section. Have the Grantee demonstrate their knowledge by navigating and using the system to support their responses. Document the customer's workNet ID# and results (are they documented properly) in the results sheet.*
What is the process for identifying and recruiting for the program?	**Instructions/Guidance:** **Related Procedures:** * Procedures Manual: Chapter 3 - Recruitment and Engagement (PDF) **Potential Outcomes:** • Management Recommendation **Outreach Rubric Meets Standards Definition:** • Messaging: Use words and terms that are appealing and appropriate to your audience, and accurately describe your program. Avoid industry jargon. Terms that may appeal to youth include earn while you learn, real-life experience, and work towards a career.	*N/A*	**Notes:** **Rating:** **Follow-up:**

	● Visuals: Use professional-looking images and graphics that incorporate a variety of youth, so they can "see" themselves in the activity. ● Outreach Channels: Distribute the materials where your audience hangs out. That could be at school, church, community centers, social media, and social networks like clubs. ● Share Success: Collect success stories and post them as inspiration to others that they might enroll in the program. **Discussion Points:** ● Explain the process for recruiting o Where do you recruit? o What mediums do you use to recruit? o Is there a priority of service established for youth? o What is the target population? o How do you identify the target population?		
Do you have established Employers for worksite placement? **Do you have established employers for permanent placement?** **What is your process (and frequency) for continuous recruitment of employers for both worksite**	**Instructions/Guidance:** ● JTED Business Engagement Training (PPT) **Related Procedures:** * Procedures Manual: Chapter 3 - Recruitment and Engagement (PDF) **Potential Outcomes:** ● Management Recommendation **Outreach Rubric Meets Standards Definition:** ● Grantee has a process in place for establishing employer relationships to meet the worksite placement needs for all customers in the program.	*N/A*	**Notes:** **Rating:** **Follow-up:**

and permanent placements?	• Grantee has a process in place for establishing employer relationships to meet the permanent placement needs of all customers in the program. **Discussion Points:** • For worksite placement: o Explain the relationship you currently have with the worksite employers. o If you don't have an adequate relationship, how will these be established? o How often are you in contact with the employer? o How do you obtain the timesheets for payroll? o Remember that a worksite assessment and agreement need to be uploaded in Illinois workNet. • For permanent employment: o Explain the relationship you currently have with the permanent employers. o If you don't have adequate relationships for permanent placement, how will these be established? o How often do you communicate with the permanent placement employers? o How will you obtain verification of employment? o How will you obtain verification of retention?		

Step 3 - Intake/Enrollment Results Sheet

On-site/Remote Meeting Intro/Script for the Intake/Enrollment Section

We are going to talk about the Intake/Enrollment process. I have some discussion questions that we will go through, and I will take notes to document your processes, best practices, challenges, and overall feedback. During our time together, I will share best practices with you as well as correct any documentation and identify any items that could potentially result in a finding. Additionally, we will look at some of the desk review customers to ensure the documentation is in place, aligns with your scope of work, and follows policy and procedure. We will go over assessment information, forms, internal policy, and customer handout examples.

Intake/Enrollment Staff Results Sheet

* JTED Procedures Manual

Items that need immediate corrective action have 1 week to respond and all others take 30 days.

Interview Questions:	References/Potential Outcomes	Other Participant ID	Indicators for Technical Assistance
Ask the career planner/navigator the following questions to document their process & assess their knowledge of partner tools & policy.	*Use the following to clarify policy, instructions, and expectations. The potential outcomes could be:* ● *Management Recommendation* ● *Observations based upon JTED procedures*	*The workNet ID# is listed on the left-hand column in the customer profile.*	*Use the following instructions as guidance for making notes and documenting the Grantee's response in the results section. Have the Grantee demonstrate their knowledge by navigating and using the system to support their responses. Document the customer's workNet ID# and results (are they documented properly) in the results sheet.*
In orientation, how do you communicate program opportunities and requirements for participating? AND what is communicated?	**Instructions/Guidance:** **Related Procedures:** *JTED Procedures Manual: Chapter 3 - Recruitment and Engagement (PDF) Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** ● Management Recommendation **Intake/Enrollment Rubric Meets Standards Definition:** ● Grantee has a process in place for communicating program requirements and documenting customer's willingness to participate. ● Documentation is kept in the customer's folder. **Discussion Notes:** ● Collect a sample of the written requirements and procedures related to program participation if available.	*N/A*	**Notes:** **Rating:** **Follow-up:**

Describe your process for completing the intake review. What is the timeframe between submitting the intake form and completing the intake review?	Instructions/Guidance: ● Adding Customers to JTED Group (PDF) (Video) ● Completing Applications (PDF) o (Video - Cat. 1, 2, 3) o (Video - Cat. 4) ● Completing Intake (PDF) (Video) ● Referrals (PDF) (Video) ● Services Needs Assessment (PDF) ● JTED Dashboard (PDF) ● Case File Cover Sheets - Coming Soon **Related Procedures:** * Procedures Manual: Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** ● Management Recommendation **Intake/Enrollment Rubric Meets Standards Definition:** ● Supporting eligibility documentation is collected. ● Eligibility status and Needs Assessment is completed in the Intake Review tab within 10 days of adding the customer to the system. **Discussion Points:** ● This information is documented in the customer's Intake Review tab. ● Discuss what the customer would like to accomplish. Discuss how the customer's needs and desires relate to the recommended training programs and the potential careers within a career pathway. ● Determine if the customer is interested in any training programs that are offered. If they are not offered, provide next steps with resources that could help them reach their training and employment goals.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

- If interested, review eligibility requirements. Identify and collect the required documentation the customer will need to provide to verify eligibility.

Recommendations:

- Do not hold up eligibility in order to collect documentation on multiple barriers.
- Use an eligibility checklist to ensure the proper documentation is collected.

Prior to enrollment, are you using additional <u>assessment(s)</u> to determine the customer's current situation? ***Example: skill level, aptitude, interests, and supportive service needs assessments.*** **Where do you document your assessment(s)**? **How are you using the results?**	**Instructions/Guidance:** ● Completing Intake (PDF) (Video) ● Services Needs Assessment (PDF) **Related Procedures:** * Procedures Manual: Chapter 3 - Recruitment and Engagement (PDF) Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** ● Management Recommendation **Intake/Enrollment Rubric Meets Standards Definition:** ● The online JTED system Intake Review tools are used to determine if the customer should/can be enrolled into the program. ● The results are documented, and eligibility is verified on the customer's Intake tab. ● All other assessment results are documented in the Illinois workNet Summary Tools Assessment area. **Discussion Notes:** ● Assessments offered through Illinois workNet will automatically populate the assessments tab. Assessments not offered through Illinois workNet are manually entered into the other assessments area. ● Assessment results should be discussed when working with the customer to put together the assessment summary and career plan goals. ● Assessments entered in this section will be available in the Illinois workNet Career Plan when you get to that point with the customer.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

How do you handle customers who declined to participate or do not meet program requirements?	**Instructions/Guidance:** ● Completing Intake (PDF) (Video) **Related Procedures:** N/A **Potential Outcomes:** ● Management Recommendation **Intake/Enrollment Rubric Meets Standards Definition:** ● Set recommendation status to "declined to participate" or "not eligible" within 10 days of submitting the application. ● Document results and next steps in the customer intake tab. ● Next steps should be to refer customers to the local providers and/or self-access tools. **Discussion Notes:** ● You may want to check in with customers later to see if their situation has changed and to see if they are interested in participating.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**
How do you handle customers that you cannot enroll at this time due to the lack of program openings?	**Instructions/Guidance:** **Related Procedures:** N/A **Potential Outcomes:** ● Management Recommendation **Intake/Enrollment Rubric Meets Standards Definition:** ● Next steps should be to refer customers to the local providers and/or self-access tools. **Discussion Notes:** ● If openings become available, you may want to check in with customers later to see if they are interested in participating.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

What information do you collect to ensure that you can stay in contact with the customer? **How do you communicate with your customers?** **What procedures do you have in place to protect the customers' Personally Identifiable Information (PII)?**	**Instructions/Guidance:** ● Authorization of Release of Information Template (Word) **Related Policy:** * *Personally Identifiable Information (PII) TEGL 39-11 (PDF) **Potential Outcomes:** ● Management Recommendation **Intake/Enrollment Rubric Meets Standards Definition:** ● Don't include a full Social Security Number (SSN). ● Customer's legal name and the name they go by/use. **Discussion Notes:** ● Should have the customer's most recent cell number or identify the best way to contact the customer. ● Share Case worker/Career Planner Contact Information with the customer. ● Do not include full name and DOB (or SSN) in an email when working with other partners or staff.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

Step 4 - Career Development and Supportive Service Results Sheet

On-site/Remote Meeting Intro/Script for the Career Development and Supportive Service Section

Now we are going to talk about engagement, service delivery, training, and employment. We will go over forms, internal policy, program and credential evidence, and examples of customer progress as appropriate (e.g., copy of CNC project mailed for certification).

Career Development Plan & Supportive Service Results Sheet

* JTED Procedures Manual

Items that need immediate corrective action have 1 week to respond and all others take 30 days.

Interview Questions:	References	Other Participant ID	Instructions for Technical Assistance
Ask the career planner / navigator the following questions to document their process & assess their knowledge of partner tools & policy.	*Use the following to clarify policy, instructions, and expectations. The potential outcomes could be:* ● *Management Recommendation* ● *Observations based upon JTED procedures*	*The workNet ID# is listed on the left-hand column in the customer profile.*	*Use the following instructions as guidance for making notes and documenting the Grantee's response in the results section. Have the Grantee demonstrate their knowledge by navigating and using the system to support their responses. Document the customer's workNet ID# and results (are they documented properly) in the results sheet.*
Walk me through the process and time frame for completing the initial IwN Career Plan? **Was a copy provided to the customer?**	**Instructions/Guidance:** ● Career Plan Overview (PDF) **Related Procedures:** * Procedures Manual: Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** ● Management Recommendation **Career Development & Service Rubric** **Meets Standards Definition:** ● The career plan is created in Illinois workNet and includes at least one assessment summary, at least one goal, and at least one planned/started service. ● It should: o be developed with the customer; o address the customer's current education and workforce development status;	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

- address the customer's unique strengths and challenges;
- encompass career, academic, support/barrier reduction service, and experiences;
- include specific education and employment goals and outcomes;
- identify the career pathway of preparation; and
- contain the customer signature.

- The customer has been told their career plan is available to them through their Illinois workNet account.
- The signed IwN Career Plan agreement is uploaded and kept in the customer's file (or signed electronically).
- Update the career plan as services are provided or if circumstances change. The customer should resign if significant changes are made.

Discussion Notes:

- Once the initial Illinois workNet career plan is complete, a copy of the signed plan is uploaded into the system and the agreement status is updated.
- Ensure customers know their Career Plan is available in Illinois workNet and will continue to be updated as they move through the program.

How do you use assessment results to determine customer's short- and long-term goals?	**Instructions/Guidance:** • Career Plan Overview (PDF) **Related Procedures:** * Procedures Manual: Chapter 3 - Recruitment and Engagement (PDF) Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:**	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

- Management Recommendation

Career Development & Service Rubric
Meets Standards Definition:

- Assessment results are used to develop short and long term goals.
- Goals are realistic, measurable, and attainable.

Discussion Notes:

- Goal-setting starts with a thorough assessment. It answers the question,"Where is the person now?"
- Customer and grantee work as partners to negotiate mutual agreements in response to the question, "Where do you want to go?" Both need to own the goals resulting from this process.
- Goals and objectives should be prioritized. On what goal/objective/outcome does the person want to focus his/her attention the most?
- Goals should be realistic, attainable, success-oriented, measurable, and observable.
- Check to see if assessment results are saved in the customer’s assessment tab.
- Does the customer have an Illinois workNet Career Plan assessment summary?
    - If yes, do the goals appear to be written so they align with the assessment summary.
    - Are there some needs that are identified in the assessment summary that are not addressed in the goals/steps?
        - If not, how are they able to show that assessment results are addressed in the career plan? Note: Look at the review tab and look for steps that have the icon showing it addresses a “barrier”.

How do you determine what services are needed to help the customer reach their goals?	**Instructions/Guidance:** ● Services Needs Assessment (PDF) **Related Procedures:** * Procedures Manual: Chapter 3 - Recruitment and Engagement (PDF) Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** ● Management Recommendation **Career Development & Service Rubric Meets Standards Definition:** ● Identify supportive/barrier reduction services based situations that need to be planned around in order to help the customer reach their goals. These situations are identified during the assessment process. ● Identify training services based on goals and initial assessments such as basic skills, employment/education history, job/employability skills, and skills and interests. ● Identify career/job search services based on goals and initial assessments such as basic skills, employment/education history, job/employability skills, skills and interests, and employers specific expectations and ensure customer services address those needs. **Discussion Notes:** ● Plans should include applicable career plan elements based on the customer's needs assessment. ● Educational services must include instructional approaches that offer a continuum of skill, grade-level, and developmentally appropriate educational options that connect to career pathways.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

	● Supportive services are services that are necessary to enable an individual to successfully participate in activities. Grantees should have policies and procedures related to offering support services. ● If applicable, barrier reduction services are utilized to increase family stability and job retention by covering accumulated costs for basic needs. ● Once "where to go" is defined, the customer and the grantee can determine who does what, and which persons/organizations need to be involved. ● Service can be provided by an in-house service, by a partner, or self-accessed. Each service should identify the provider of the service, planned start date, planned end date and projected number of weekly hours to dedicate to the service.		
How do you communicate with the team to assist the customer?	**Instructions/Guidance:** ● Telling the Story in Case Notes **Related Procedures:** * Procedures Manual: Chapter 8 - Case Notes & Documentation (PDF) **Potential Outcomes:** ● Management Recommendation **Career Development & Service Rubric Meets Standards Definition:** ● Case notes are used as the communication tool to document notes/progress as well as to send emails/messages when appropriate. **Discussion Notes:**	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

	● Key to this strategy is the identification of the 'lead service provider,' which, in many cases, would be the Grantee, to coordinate meetings/conferences for the customers. ● Team members are chosen based on the services that are needed to help the customer succeed in the program. ● This strategy focuses on the unique needs of the individual and should be led by the customer.		
What is your process and time frame for engaging a customer? **If this process takes longer than 2 weeks, how is the customer kept engaged?**	**Instructions/Guidance:** ● Completing Intake (PDF) (Video) **Related Procedures:** * Procedures Manual: Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** ● Management Recommendation **Career Development & Service Rubric Meets Standards Definition:** ● The customer's training program is identified in the customer's intake. ● The initial career plan includes the service(s) with a planned/actual start date. ● At a minimum, case notes need to be added monthly and the career plan needs to be reviewed and updated if necessary. **Discussion Notes:** ● Verify the training program selected in the intake review aligns with the training step/provider in the customer Career Plan. ● Time frame and requirements vary by provider. Collect this information so that it can be used for developing best practices in the future.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

	o If this process takes longer than 2 weeks, a conversation needs to take place with the Grantee about why it is taking so long and ways to reduce the time, and how to keep the customer engaged. o What types of services are offered to keep the customer engaged until they can start the occupational training program?		
What techniques are used to keep customers motivated and engaged while they are in their training program?	**Collect best practices.** **Discussion notes:** ● These projects should be innovative so what are they doing that is outside of their standard business practices? ● What have you found to be the biggest challenges for your customers and how are you addressing those needs? ● Could you share any lessons learned while implementing an innovative approach?		
How often do you reassess to determine the customers' current needs and next steps?	**Instructions/Guidance:** ● Assessments ● Telling the Story in Case Notes **Related Procedures:** * Procedures Manual: Chapter 4 - Intake Process & Career Planning (PDF) **Potential Outcomes:** N/A ● Management Recommendation **Career Development & Service Rubric** **Meets Standards Definition:** ● Minimum monthly Illinois workNet Career plan review to ensure the customer is on track or if services need to be adjusted to meet their needs. ● Update case notes at least monthly. **Discussion Notes:**	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

	• Check to see if a customer has updates to their Career Plan update log within the past month. This can include assessing one or more of the following: o Needs Assessment (Intake tab) o Basic Skills for Adult Education/English As A Second Language o Employment/ Education History o Family/ Support System o Job/ Employability Skills o Skills and Interests o Aptitudes o Everyday Life Skills o Determine if the customer meets specific employer job requirements		
What do you do if they are not meeting requirements? **What do you do if they are meeting requirements?**	**Instructions/Guidance:** • Participant Improvement Plan Example • Telling the Story in Case Notes **Best Practices:** • Include best practice as identified by the grantee. **Discussion Notes:** • Collect best practice examples and resources for dropout prevention, mentoring, motivational techniques, etc. • Include a case note to document the required actions and any support documentation. • The grantee may change the status of the customer's goal to "Off Track" if they are not meeting requirements.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

How do you handle <u>incidents</u> involving customers? ***Example: threats, violence, sexual harassment.***	**Instructions/Guidance:** ● Participant Improvement Plan Example **Best Practices:** ● Include best practice as identified by the grantee. **Discussion Notes:** ● Do you have a formal written process in place? Are these expectations reviewed and provided to the customer? ● If violent incidents occur, police are notified.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**
What is your process for putting customers into work-based learning?	**Instructions/Guidance:** ● Assessments **Related Procedures:** *JTED Procedures Manual: Chapter 5 - Sector-Based Learning & Work-Based Learning (PDF) **Potential Outcomes:** ● Management Recommendation **Career Development & Service Delivery Rubric Meets Standards Definition:** ● Customers are assessed prior to placement to ensure the experience builds upon the customer's academic and career interests. ● Assessments should be documented in the customer's assessment tab in IwN. **Discussion Notes:** ● Free assessments are offered through Illinois workNet that can be used to identify the customer's: o Skills and interests ▪ Career Cluster Inventory	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

	▪ Interest Profiler ▪ SKILLS Profiler ▪ Work Importance Locator o Employability skills ▪ Observational Evaluation ▪ Worksite Evaluation		
What type of work experience do you offer as part of the training? **When are participants placed in <u>work experience</u> and for how long?** **Are customers in <u>work experience</u> and training at the same time?** **Is the <u>work experience</u> and skill development process aligned with the training program?**	**Instructions/Guidance:** ● Worksite Placement and Payroll Upload (PDF) ● Document Customer Plans and Progress (PDF) ● WIOA Work-Based Learning Desk Reference (PDF) **Related Procedures:** *JTED Procedures Manual: Chapter 5 - Sector-Based Learning & Work-Based Learning (PDF) **Potential Outcomes:** ● Management Recommendation **Career Development & Service Delivery Rubric Meets Standards Definition:** ● Employers and worksites are entered into the IwN worksite placement tool and are used to populate the customer's IwN Career Plan. ● Work experiences build upon the customer's academic and career interests and provide meaningful and relevant opportunities to demonstrate skills and knowledge aligned with the training program. ● Work experiences must include academic and occupational education.	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

	Discussion Notes: ● To get a list of customers in word experience: o Go to the customer list. o Select Mgt Report o Go to the work experience section and select show/hide activities. o Select the number associated with the appropriate work experience line item to access a list of customers. o Select the customer's name and worksite placement tab for details.		
Describe the process for following up with both the employer and the customer to ensure the work experience meets or exceeds their expectations. **What happens if one or both parties are not satisfied with the experience?**	**Collect/Share Best Practices:**		
Not applicable to JTED at this time. **Is the customer's payroll uploaded for the work experience?**	**Instructions/Guidance:** ● Worksite Placement and Payroll Upload (PDF) **Related Procedures:** * JTED Procedures Manual: Chapter 13 - References (PDF) **Career Development & Service Delivery Rubric**	N/A	**Notes:** **Rating:** **Follow-up:**

	Meets Standards Definition: ● Subsidized (when the grantee is the employer of record) work experiences should have an uploaded payroll in the IwN system. **Discussion Notes:** ● To get a list of customers in paid work experience: o Go to the customer list. o Go to the work experience section and select show/hide activities. o Select the number associated with Paid Work Experience to access a list of customers. o Select the customer's name and worksite placement tab for details. o If the placement is subsidized, they should have an uploaded payroll.		
Can you give me a brief overview of how the dashboard works and how you utilize the information?	**Instructions/Guidance:** JTED Dashboard (PDF) **Related Procedures:** N/A **Potential Outcomes:** **Discussion Notes:** ● What do you do if your numbers are one-off or not adding up? ● Have you looked at the customer's outcomes tab to see if they have the services or credentials that you were expecting?	N/A	**Notes:** **Rating:** **Follow-up:**

Step 5 - Completion Review Sheets

On-site/Remote Meeting Intro/Script for the Exit/Follow-Up Status Section

Now we are going talk about the process to document customer program completion status and permanent employment. We will go over forms, internal policy, and customer handout examples if not in the JTED online system.

Completion Status Results Sheet
* JTED Procedures Manual
Items that need immediate corrective action have 1 week to respond and all others take 30 days.

Interview questions:	References	Other Participant ID	Instructions for Technical Assistance
Ask the JTED career planner/navigator the following questions to document their intake process & assess their knowledge of JTED partner tools.	*Use the following to clarify policy, instructions, and expectations.* *The potential outcomes could be:* ● *Management Recommendation* ● *Observation based upon JTED procedures*	*The workNet ID# is listed on the left-hand column in the customer profile.*	*Use the following instructions as guidance for making notes and documenting the Grantee's response in the results section. Have the Grantee demonstrate their knowledge by navigating and using the JTED system to support their responses. Document the customer's workNet ID# and results (are they documented properly?) in the results sheet.*
What next steps are communicated to customers who have completed the program and in what format is that provided to the customer?	**Best Practice**	N/A	**Notes:** **Rating:** **Follow-up:**
How are you handling the customer during the <u>6 and 12-month job retention</u>? **What documentation do you request from the customer to <u>verify employment</u>?**	**Instructions/Guidance:** **Related Procedures:** * Procedures Manual: Chapter 7 - Program Goals & Outcomes (PDF) **Potential Outcomes:** ● Management Recommendation **Discussion Notes:**	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**
Completed: <u>permanent placement</u>:	**Instructions:** **Related Procedure:**	*workNet ID#:*	**Notes:**

Does the customer have their required documentation uploaded for completion?	* Procedures Manual: Chapter 7 - Program Goals & Outcomes (PDF) **Potential Outcomes:** ● Management Recommendation **Completion/Follow-Up Rubric Meets Standards Definition:** One of the following forms of employment verification is on file: ● Confirmation from the employer ● Paystubs ● Employee Identification Number ● Other **Discussion Notes:**		**Rating:** **Follow-up:**
Complete going to higher education: **Does the customer have their required documentation uploaded for completion?**	**Instructions:** **Related Procedures:** * Procedures Manual: Chapter 7 - Program Goals & Outcomes (PDF) **Potential Outcomes:** ● Management Recommendation **Completion/Follow-up Rubric Meets Standards Definition:** ● Document Provider, Program Name, Start Date, and other related notes in the Completion/Follow-up tab. **Discussion Notes:**	*workNet ID#:*	**Notes:** **Rating:** **Follow-up:**

Customer Interview

Step 6 - Customer Interview/Results Sheet

1. Have access to a laptop to look at the customer's profile in the online JTED system during the interviews.
2. Explain the process to the customer– *Hi. My name is _____ and I work for the ______. We are happy that you are participating in JTED and would appreciate your honest feedback. You may have been asked for your feedback before, but we want to make sure we're thoroughly capturing information to make the program as strong and valuable as possible. There are no right or wrong answers We want your perspective to identify areas in the program that are most important or helpful to you. We also want to identify areas that could be improved. I have some discussion questions that we will go through, and I will take notes to document best practices, challenges, and overall feedback.*
3. Use the **Customer Interview Sheet** to ask the questions and then document the responses for each section.

Customer/Interviewee Information		
(Customer Name/workNet ID1):	*(Customer Name/workNet ID2):*	*(Customer Name/workNet ID3):*
(Training Program for Customer 1):	*(Training Program for Customer 2):*	*(Training Program for Customer 3):*

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
Why did you decide to participate in the JTED program?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	**Positive** responses can be collected as best practices. **Negative** responses will require follow-up questions to the customer.

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
Who is your case manager?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	This is asked so you can make the questions more personalized and conversational.
What is ________ (case manager) doing to help you to be successful in this program? ● Positive success response: go to the next question. ● Negative response - ask: what could your case manager do to help you be successful in the JTED program?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	**Positive** responses can be collected as best practices. **Negative** responses will require follow-up questions to the customer. This will be discussed with the Grantee at a later date so they can correct the issue.

<table>
<tr><th>Customer Question</th><th>Customer 1</th><th>Customer 2</th><th>Customer 3</th><th>Follow-up Actions</th></tr>
<tr><td>Did _________ (case manager) work with you to put together a plan with the steps and support that you need to be successful in this JTED program?

● If Yes/Positive, were you given a copy of your plan? Tell me how you follow the plan.

● If no/negative, how do you know what you are supposed to be doing? Tell me about what you’ve been doing with the JTED program.</td><td>Notes:

Follow-up:</td><td>Notes:

Follow-up:</td><td>Notes:

Follow-up:</td><td>Verify the JTED system & documentation correspond to the customer’s info.
● Career Plan
● Case Notes

Positive responses can be collected as best practices.

Negative responses:
● Grantee is required to review the JTED plan with the customer and provide all JTED customers with a copy of the plan.</td></tr>
<tr><td>Tell me about the JTED training program you’re in.

● Tell me about how you picked this training program?

● How long have you been in the training program?

● Are you able to stick to the training schedule?

● Is the program helping you with transportation, childcare, tutoring, mentoring, training</td><td>Notes:

Follow-up:</td><td>Notes:

Follow-up:</td><td>Notes:

Follow-up:</td><td>Verify the JTED system & documentation correspond to the customer’s info.
● Training Program
● Supportive/Barrier Reduction Services

Beginning
● Positive responses can be collected as best practices.
● Negative responses communicate to Grantees that they are required to provide customers with supportive services to help them complete the training program. If the Grantee is not providing the supportive services needed for the customer to successfully</td></tr>
</table>

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
materials, books, required attire, training, and required tools/equipment? ● Tell me how you schedule your week so that you can be successful in the program? *(related to transportation, housing, other obligations, etc.)* o **Middle of Training Program (Halfway point or beyond in training program)** ▪ Additional Questions to ask: ▪ Are you passing the training program? ▪ Do you feel the training will help you get a job? o **End of Training Program (Finished Training Program)** ▪ Additional Questions to ask: ▪ How would you define successfully completing the program? ▪ Did you pass your JTED training program?				participate in JTED, this should be communicated back to the Grantee at a later date. This can result in a management recommendation. Middle/End ● **Positive** responses can be collected as best practices. ● **Negative** responses, communicate to Grantees that they are required to provide customers supportive services to help them complete the training program. If the Grantee is not providing the supportive/ barrier reduction services needed for the customer to successfully participate in JTED, this should be communicated back to the Grantee. This can result in a management recommendation. Toward the end of the training, the customer should also be engaged in job preparation services at this point. If customers are not properly prepared for finding a job, this can result in a management recommendation.

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
▪ Do you feel prepared for job interviews? ▪ Do you feel you are prepared with your resume and ready for job interviews?				
What do you like about the JTED Program?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	Collect as best practices.
What don't you like about the JTED Program?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	Collect as possible future recommendations.
If you could make a change to the JTED program, what would it be?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	Collect as best practices.

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
What other programs do you think would be beneficial if offered through the JTED program?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	Collect as best practices.
Would you recommend the JTED Program to a friend? Why or why not?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	Collect as best practices.
Worksite Placement Questions – (Customer)				
Who is your supervisor on your work site?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	This is the individual who should be interviewed/observed during the work experience employer interview. If the customer does not know who their supervisor is, check the customer's worksite placement contact. Go to *Worksite > Select the Agency the customer is with and the employment type > Filter > Select the Worksite the customer is with > View the Contact info on the right-hand side.*

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
Were your job duties explained to you? ● Yes, positive ● No, negative **Who explained your job duties to you?**	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	**Positive** responses can be collected as best practices. **Negative** responses communicate to the Grantee at a later date that they need to cover job duties with customers prior to enrolling them in worksite placement.
Tell me about the work experience you are in: ● Are you able to follow the job schedule and get to your job on time? ● Do you feel that you have everything you need to get to the job? ● Do you feel like you need anything else in order to help you complete job assignments? ● Do you feel like you need any other equipment for you to do your job? ● Would more training be helpful to you in order to complete your job duties?	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	**Positive** responses can be collected as best practices. **Negative** responses communicate to Grantees that they are required to provide customers supportive services to help them complete/attend their work experience. If the Grantee is not providing the supportive/barrier reduction services needed for the customer to successfully participate in JTED, this should be communicated back to the Grantee at a later date. The Grantee needs to determine why the supportive services were not provided or why they cannot be provided and make corrective actions. This can result in a finding.

Customer Question	Customer 1	Customer 2	Customer 3	Follow-up Actions
Do you feel like your work experience placement is preparing you for a permanent job in the career sector that you have been trained in? **If yes, how?** **If no, why not?**	Notes: Follow-up:	Notes: Follow-up:	Notes: Follow-up:	**Positive/yes** responses can be collected as best practices. **Negative/no** responses will require follow-up questions to the customer. This will be discussed with the Grantee at a later date so they can correct the issue. If the customer expresses that they are not being properly prepared for permanent placement, the Grantee may need to consider finding other worksites to work with.

Employer Interview

Step 7 - Work Experience Employer Interview/Results Sheet

1. Have access to a laptop to look at the customers profile in the online JTED system during the interviews.
2. Explain the process to the customer– *Hi. My name is _____ and I work for the ______. We are happy that you are participating in JTED and would appreciate your honest feedback. There are no right or wrong answers. We want your perspective on the placement process; how the employee is working out for you; and what we can do to help improve the situation, if needed. I have some discussion questions that we will go through, and I will take notes to document best practices, challenges, and overall feedback*."
3. Use the **Work Experience Employer Interview Sheet** to ask the questions and then document the responses for each section.

Employer/Interviewee Information	
Employer Location	
Employer Name	
Employer Title	

Employer Question	Answer Section	Follow-up Actions

How did you hear about the JTED program, and why did you want to become a worksite?	Notes: Follow-up:	If **positive** response, collect as best practices. If **negative** response, document information to discuss with the Grantee at a later date so they correct the issue. If they were not involved in this process, state that in the answer section.

Describe your relationship with the Grantee and the communication between both parties?	Notes: Follow-up:	If **positive** response, collect as best practices. If **negative** response, additional follow-up questions will need to be asked. This will need to be discussed with the Grantee at a later date to help create a better communication process between both parties.
Describe your experience with becoming an JTED worksite. ***If the interviewee does not understand this question, ask them what they had to do to become a worksite.***	Notes:	If **positive** response, collect as best practices. If **negative** response, document the information and communicate this with the Grantee at a later date so they can correct the process.

		If they were not involved in this process, state that in the answer section.
	Follow-up:	

What is the process for providing performance feedback/evaluation to the program participant and provider/case worker?	Notes:	If performance assessments are being used, collect examples as best practices. If none are being used, this needs to be discussed with the Grantee. The Grantee should be updated on the customer's performance to allow them to serve the customer the best way possible. Recommend the Worksite Assessment.
	Follow-up:	

How many program participants did you meet with for each position? **Of those program participants, how many did you take?** **Why did you not take the other program participants?**	Notes: Follow-up:	
How does the program participant's training program relate to what you have them doing in their work experience?	Notes:	

	Follow-up:	
How are the program participants performing that have been referred to you? Please provide a few examples.	Notes:	If **positive** response, collect as best practices. If **negative** response, additional follow-up questions will need to be asked such as what they think could be done differently to help increase performance. This will need to be discussed with the Grantee at a later date. Customers may need additional supportive services to help them be more successful in their work experience.
	Follow-up:	

Would you consider hiring any qualified participants when openings are available?	Notes: Follow-up:	If **positive** response, collect as best practices. If **negative** response, additional follow-up questions will need to be asked. This will need to be discussed with the Grantee at a later date. If the interviewee said the customers were performing well, but they are not going to consider hiring them, the Grantee may want to consider different work experience options because this worksite is just doing it for free help.