##

**Illinois**

**WIOA Service Integration**

## **Overview and Self-Assessment Guide**

## **November 2023**



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**Service Integration in Illinois under the**

 **Workforce Innovation and Opportunities Act**

**An Overview and Self-Assessment Guide**

# I. Introduction

For purposes of implementing the federal Workforce Innovation and Opportunities Act (WIOA), the Illinois Workforce Innovation Board (IWIB) defines service integration as a combination of strategies 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.

Seven (7) service integration functions identified by the IWIB and outlined in its service integration policy (Appendix A) are the focus of Illinois’ local one-stop delivery system: customer-centered design, partner staff, intake and assessment, service, information, and evaluation. The goals and outcomes for these functions represent a long-term, high-level vision for One-Stop Center service integration in Illinois. Operationalizing these goals occurs locally through the WIOA planning, one-stop certification, and MOU negotiation processes.

This Self-Assessment Guide was developed to help Local Workforce Innovation Boards (LWIBs) implement the State’s Service Integration Policy.

The approach highlighted in this guide involves inviting partners to come together for discussion and planning by collaboratively assessing levels of service integration and identifying areas of interest for focused efforts toward improved levels of service integration. Each LWIB will be responsible for determining the level of service integration in all seven (7) functional areas and thirty (30) application points for each One-Stop Center it oversees. The IWIB recognizes that each local area may be at different levels of integration and that it may take years to achieve and implement one or more functions and goals.

Equity and equitable access to services is a foundational principle of the Illinois Workforce System and is fundamental to integrated service delivery and assessment. The IWIB defines equity as the lens through which the State will evaluate equitable service delivery. “The State, quality, or ideal of being just, impartial, and fair. The concept of equity is synonymous with fairness and justice. To be achieved and sustained, equity needs to be thought of as a structural and systemic concept.” (The Annie E. Casey Foundation).

In Illinois, LWIBs are to approach service integration efforts using the lens of career pathways. This career pathways approach envisions that Illinois residents will progressively build toward college and career success through aligned education, training, and employment opportunities over their lifetime. A wide range of education and training programs and initiatives administered by various private, State, and local entities falls within this system of college and career pathways. As such, several state education and workforce committees, including an extensive base of stakeholders, have defined key terms to ensure alignment across agencies, legal frameworks, and initiatives. Before conducting the self-assessment, LWIBs and all WIOA partner agency staff are encouraged to review Illinois’ Career Pathways Dictionary2, which defines terms essential to career pathway programs and system elements. Definitions of selected key terms are provided in the next section.

II. Definitions

Following are definitions of selected key terms used in the IWIB Service Integration Policy and referenced in this guide.

Agency: The agency, entity, or partner that provides workforce development services or activities of the core, required, and optional partner programs.

Basic Information[[1]](#footnote-2): State or locally agreed upon customer information that can be gained without assessments and is useful to starting services.

Career Plan: A written plan developed jointly by the career planner and the customer outlining an individual’s career goals and the combination of services needed to reach those goals. The career plan is developed based on an assessment of the skills and abilities of the customer. The career planner regularly reviews, discusses, and updates the career plan with the customer to ensure the customer is on track and determine if any additional assistance is needed for the customer to meet their employment goals.

Career Planner: An individual who provides services to customers, such as preparing and coordinating career plans and providing job, education, and career counseling, to ensure access to necessary workforce development activities and supportive services as appropriate during program participation and after job placement.

Collaborative Intake Process: A locally developed intake process that enhances staff and customer eligibility knowledge and reduces duplicative intake practices. Each LWIB must determine its strategy to incorporate relevant local partner services.

Cross-Training: The process of providing local workforce development professionals with basic information about each one-stop agency’s programs (e.g., eligibility requirements and benefits) to facilitate appropriate customer referrals.

Equity Lens: An equity lens is “an ongoing process for analyzing or diagnosing the impact of the design and implementation of policies on under-served and marginalized individuals and groups, and to identify and potentially eliminate barriers.” Source: Minnesota State Office of Equity and Inclusion

Follow-Up: Follow-up is required for all WIOA Title I Adult, Dislocated Worker, Youth, and Trade Adjustment Assistance (TAA) participants who have exited the program. Follow-up is designed to help individuals retain employment, earn wage gains, and/or advance within their occupation. For Title I Youth, Follow-up contact attempts and services help ensure youth receive the support they need as they transition to work or postsecondary education.

Job Competencies: The workplace and technical skills, attributes, and knowledge necessary to fulfill the job duties and responsibilities of workforce development professionals. While core workplace skills such as analytical thinking, computer competency, conceptual thinking, conflict resolution, customer service, decision-making, excellent communication, and teamwork are often the same across several occupations, technical skill requirements can vary depending on the content area(s) in which an individual works. For example, the technical skills of a marketing professional would differ from those of a career planner, but they would both be expected to have the same core workplace skills.

Personally Identifiable Information (PII): Any representation of information that permits the identity of an individual to whom the information applies to be reasonably inferred by either direct or indirect means. Further, PII is defined as information: (i) that directly identifies an individual (e.g., name, address, social security number or other identifying number or code, telephone number, email address, etc.) or (ii) by which an agency intends to identify specific individuals in conjunction with other data elements, i.e., indirect identification. (These data elements may include a combination of gender, race, birth date, geographic indicator, and other descriptors). Information permitting a specific individual's physical or online contact is the same as personally identifiable information. This information can be maintained in either paper, electronic, or other media.

Quality Integrated Services: 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.

Organizational Values: An organization’s values guide how the organization should achieve its vision and mission. Vision and mission establish and provide direction, focus, and inspiration to accomplish shared goals. Examples of organizational values include, but are not limited to, accountability, collaboration, continuous improvement, innovation, integrity, and respect.

Performance Expectations: Performance expectations focus on the outcomes that should result from executing one’s job duties and are clearly linked to organizational goals and objectives. Staff should understand why their job exists, where it fits within the local one-stop system, and strategies for achieving the expected performance outcomes. For example, to communicate the performance expectation surrounding teamwork, strategies could include building internal and external alliances to solve problems and achieve objectives, working cooperatively and respectively with co-workers, using diplomacy and tact when interacting with others, fostering collegial and cooperative attitudes, and sharing knowledge and information. Professional development should support individuals in developing their skills and deploying the strategies associated with their performance expectations.

Referral5:

* Referrals aim to ensure seamless service delivery between partners to assist individuals with barriers to employment.
* A referral is a process that moves a client through the workforce system
* To request additional workforce services for customers from other workforce partners

Referral Outcome[[2]](#footnote-3):

* The outcome of the referral is that the client has access to support and services leading to sustainable employment or relevant training.

Self-Assessment: Convey a vision of complete service integration. The self-assessments demonstrate how the Illinois Service Integration Policy can be implemented at the local level and provide a baseline measure of the current level of integration.

Streamlined Workforce: Processes and procedures that will not create additional barriers for the customer or extend the timeline for customers to receive services. A streamlined approach to access services will create an inclusive and equitable experience. Service integration will occur across entities delivering specific services or programs based on customer needs.

Suitability: Determining an individual’s suitability and “need” for services requires one-on-one assistance with partner staff. The information must be obtained to identify if services are appropriate for the individual. A review of individual barriers, work history, existing skills, interests, expectations, and the availability of appropriate services shall be reviewed to determine if the individual should be enrolled.

Those we serve: Clients, participants, students, employers, etc.

WIOA Law: Passed in July 2014, the Workforce Innovation and Opportunity Act (WIOA) is the first federal reform of the workforce system in 15 years. WIOA replaces and modifies the Workforce Investment Act, which started in 1998. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. The goal of WIOA is to improve the quality of the workforce, increase economic self-sufficiency, reduce welfare dependency, meet employer skill requirements, and enhance the productivity and competitiveness of the nation.

# **III.** Level of Integration

Service integration will look different in each local area and local one-stop center, depending on the mix of services, staffing, and organizational culture. Service integration is achieved when workforce partners collaboratively determine how to align and coordinate services to meet clients' needs better. The IWIB’s goal is to support local partners in identifying their current level of service integration and then support them in areas where growth is needed. To this end, the IWIB recognizes seven (7) functions provided by one-stops in Illinois:

* Customer-Centered Design
* Partner Staff
* Intake And Assessment
* Service
* Career Pathways
* Information
* Evaluation

Each function has identified one or more goals to assist the LWIBs, One-Stop Operators, and partners in understanding the aim of service integration in Illinois.

The goal of providing the highest quality services possible to jobseekers and employers in a seamless service delivery system is enhanced as these service integration functions are achieved.

# **IV.** Overview of the Self-Assessment Outcomes and Process

**Outcomes**

There are eight (8) intended outcomes of the service integration self-assessment process.

1. Engage local WIOA partners in exchanging perspectives around service integration.
2. Capture examples, valuable ideas, and suggestions from the partners’ conversations that will inform planning and contribute to identifying improvement opportunities.
3. Discuss and reach a consensus regarding each service integration goal, application points, and future implementation plans.
4. Enhance a current plan or create a plan for each service integration goal.
5. Identify the top three (3) to five (5) priority service integration goals.
6. Assign responsibilities that have come out of planning.
7. Utilize the conversations to identify continuous improvement opportunities for the LWIB and strategic considerations for regional and local WIOA planning.
8. Recommend how the service integration process could be strengthened.

**Process**

A comprehensive assessment is essential for meaningful service integration targets to be identified and incorporated into regional and local WIOA plans. To ensure the process is completed for incorporation into the plans, LWIBs must follow the timeline outlined in the Schedule of Planning Events for Service Integration Self-Assessment (Appendix B).

The Partners List (Appendix C) is provided to outline core, required, and other possible partners. Also, consider key community partners who may not be on the list but are essential to community development. Ideally, each partner should have leadership, mid-management, and front-line staff participants.

**Step 1:** Gather all LWIA partners and community stakeholders, such as employers, to meet and conduct the service integration self-assessment (Appendix D) to:

* Ascertain the level of integration for each of the thirty (30) application points;
* Identify specific tactics that will be used to address each application point;
* Name which partner(s) or organization(s) will be responsible for those tactics and if anyone else should be involved;
* Outline the expected outcomes of the identified strategies;
* Establish the timeline for the expected outcomes to be achieved;
* Determine if any partners have questions and the need for technical assistance;
* Develop consensus around which goals and activities should be priorities for the LWIA and
* Agree on the priority actions needed to move the needle on the most strategically important service integration goals.

**Step 2:** LWIBs must:

* Review and evaluate the completed service integration self-assessment and
* Utilize the discussions during the self-assessment process to frame the vision in the regional and local plans.

# **V.** Self-Assessment Submission

The IWIB’s Service Integration Policy establishes that LWIBs, in coordination with the One-Stop Operators and partners, are responsible for conducting self-assessments regarding service integration in their local one-stop delivery systems. A comprehensive assessment is essential so meaningful improvement targets to progress toward service integration may be set and incorporated into regional and local WIOA plans.

1. The local Service Integration Self-Assessment describes how local workforce partners will align and coordinate services as required by the State of Illinois Service Integration Policy (WIOA Policy Chapter 1, Section 13). Any subsequent modifications and the results of the Service Integration Self-Assessment are to be incorporated into local planning. Additionally, a copy of the documentation associated with the self-assessment process must be submitted as an appendix to the plan.

# Appendix A

# IWIB Service Integration Policy

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|  |  |
| --- | --- |
| **Illinois Workforce Innovation Board** | **Andrew Warrington, Co-Chair** |
| **JB Pritzker, Governor** | **Kristin Richards, Co-Chair** |

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November 29, 2023

**WIOA Policy 1.13**

**Service Integration**

**I.**  **Policy**

**1.13 Service Integration Purpose**

1. The Service Integration policy provides requirements for the Illinois workforce system to achieve a customer-centered service delivery approach that enhances customer experiences. This policy sets forth the vision for what service integration looks like. Each section sets out a vision and specific goals that the IWIB expects all partners to work towards. The Illinois Workforce Innovation Board (IWIB) understands that not all partners can operate in the same way at all times and that there can be resource challenges. The State expects all partners to work collaboratively towards this policy's goals.
2. Programs in the workforce system refer to those we serve in various ways, such as clients, participants, students, customers, employers, businesses, etc. For the purpose of this Service Integration Policy, we use the term customer throughout.

**1.13.1 Service Integration Summary, Background, and Vision**

1. *Summary*
2. Illinois’s Service Integration Policy focuses on improving customer service by building strong partnerships to share resources and expertise across the workforce, education, and social services systems. This policy applies to the Workforce Innovation and Opportunity Act (WIOA) Core and Required Partners network in Illinois.
3. *Background*
4. The WIOA is a critical driver in transforming how workforce development programs can offer integrated service delivery. This integrated service delivery operates through a network of one-stop centers and partner organizations branded as the American Job Center (AJC) network. One-Stop Centers, referred to in Illinois as Illinois workNet Center/partner of AJC, provide central contact points for job seekers and businesses to access employment and training services.
5. Six core programs deliver these services: Title I Youth, Adult, and Dislocated Worker; Title II Adult Education and Literacy; Title III Wagner-Peyser; and Title IV Vocational Rehabilitation. Additionally, WIOA requires twelve (12) partner programs to provide access through the one-stops:
6. Career and Technical Education (Perkins)
7. Community Services Block Grant
8. Indian and Native American Programs
9. HUD Employment and Training Programs
10. Job Corps
11. Local Veterans Employment Representatives and Disabled Veterans’ Outreach Program
12. National Farmworker Jobs Program
13. Senior Community Service Employment Program
14. Temporary Assistance for Needy Families (TANF)
15. Trade Adjustment Assistance Programs
16. Unemployment Compensation Programs
17. YouthBuild
18. Local boards may include additional partners in one-stop centers such as employment and training programs operated by other federal agencies (e.g., the Social Security Administration and Small Business Administration), local employers, community-based organizations, faith-based organizations, and/or not-for-profit programs.
19. Effective planning and coordination among these workforce development programs are needed to maximize their value and benefits to business and job-seeking customers. The foundation of this policy is building relationships and consistent and ongoing communication among partners to align service delivery in a cohesive way to achieve greater outcomes for employers and job seekers.
20. The State recognizes and acknowledges that at the core of this system are federal programs with specific regulations. As outlined, State-level partners are responsible for helping to understand and implement these programs.
21. *Vision Statement*
22. Service Integration connects people with resources within and outside the workforce development system. Customers of the local workforce system are supported with integrated services as core and required partners, and other community partners work together to continuously improve service delivery through policy and data-driven decisions to assist individuals in meeting their training and employment goals. These partnerships will value customers, equity, and the law.
23. This policy builds on the existing guidance and support for service integration within the Illinois workforce ecosystem.

1. The Unified State Plan sets the vision, goals, and strategies for the workforce system in Illinois.
2. The Governor’s Guidelines to State and Local Program Partners Negotiating Costs and Services under WIOA guides how one-stops coordinate and jointly use WIOA resources.
3. The IWIB has embedded service integration expectations in key planning and policy documents, including the Unified State Plan and the IWIB’s strategic plan.
4. The IWIB’s Certification of One-Stop Centers policy guides certification of One-Stop Centers.
5. The Career Pathways Dictionary provides a framework for the definition of career pathways in Illinois developed by workforce, education, and other stakeholders.
6. The IWIB’s definition of equity is the lens the State will evaluate equitable service delivery. “The State, quality, or ideal of being just, impartial, and fair. The concept of equity is synonymous with fairness and justice. To be achieved and sustained, equity needs to be thought of as a structural and systemic concept.” Source: The Annie E. Casey Foundation

**1.13.2 Service Integration Definition**

1. The Illinois Workforce Innovation Board (IWIB) defines service integration as a combination of strategies to align and simplify access to one-stop center services and supports for employers, job seekers, and system customers with the goal of providing the best experience possible.  Service integration may occur across entities delivering specific services or programs, across time as customer needs change, or both.

**1.13.3 Service Integration Goals and Outcomes**

1. Seven (7) service integration functions are the focus of Illinois’ one-stop centers:  customer-centered design, staff, intake and assessment, services, career pathways, information, and evaluation.  Goals, outcomes, and applications for each function are listed below and represent a long-term, high-level vision for one-stop service integration in Illinois.  Operationalizing these goals will occur locally through the WIOA planning, one-stop certification, and MOU negotiation processes.

**1.13.4 Service Integration Policy Vision, Outcomes and Application**

1. Customer-Centered Design Goal.
2. *Vision for Customer-Centered Design Goal:*

Workforce partners use the IWIB Equity Lens to center the customers’ needs, goals, and challenges in designing and delivering services. Customers are respected, heard, and responded to.

1. *Outcomes for Customer-Centered Design Goal:*

Every customer can find efficient and streamlined workforce services that meet their needs, goals, and challenges regardless of their entry point.

1. *Application of the Customer-Centered Design Goal for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. Customer input is collected on an ongoing basis from local users (including One Stop walk-in customers, enrolled participants, and employers) and, at a minimum, evaluated annually by partners.
3. Customer input gathered from local users is used to evaluate and improve technologies, programs, services, interactions, accessibility, and environments within the local area. Based on customer input, local partners will propose improvements and a timeline for implementation.
4. The LWIB will set the expectation for the One Stop Operator to manage service integration initiatives in the OSO scope of work. The OSO will report to the LWIB on service integration initiatives, timelines, and progress.
5. Partner staff will provide system users access to other options for feedback outside of an annual input process and be made aware of complaints procedures and appeal rights. WIOA partners will not retaliate against users who provide negative feedback, complaints, or make appeals.
6. Partner Staff Goals.
7. *Vision for Partner Staff Goals:*

All partner staff have up-to-date information and receive ongoing training on available services, customer eligibility, and service integration strategies, and are supported by all partners.

1. *Outcomes for Partner Staff Goals:*

Partner staff understand the goals of integrated service delivery and reinforce that framework through their daily work activities.

1. *Application of the Partner Staff Goals for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. Cross-training and program information resources addressing the roles, services, performance expectations, and eligibility requirements of all WIOA partner programs are provided for all partner staff, including information and encouragement in acquiring professional credentials.
3. Communication across partners is consistent, comprehensive, and timely.
4. All partner staff receives current and relevant professional development to service integration goals.
5. All partner staff are treated as valued and respected team members.

1. Intake and Assessment Goals.
2. *Vision for Intake and Assessment Goals:*

Partners will work to eliminate duplicative processes and increase informed customer choice while protecting confidentiality.

1. *Outcome for Intake and Assessment Goals:*

Customer needs are promptly, accurately, and thoroughly identified so that partners can respond efficiently and collaboratively.

1. *Application of the Intake and Assessment Goal for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. Customers provide basic information once through a collaborative intake process or information-sharing across programs.
3. During intake, customers are provided an overview of partner services, eligibility, and suitability requirements by appropriate partner staff.
4. An open dialogue during intake and a comprehensive assessment(s) between partner staff and customers leads to informed choice and becomes the foundation of a service plan.
5. If partners use different assessments for the same purpose, they must designate a single assessment to the extent possible.
6. Partners inform and support customers throughout the process to secure the documents and verification needed for program participation.
7. Partners will review and apply asset-based and barrier-reduction practices to intake and assessment processes while using best practices to protect customer confidentiality and reduce stigmas of accessing public services.
8. Service Goals.
9. *Vision for Service Goals:*

The partners meet jobseekers’ employment, education, and training needs through communication, assessments, referrals, and resources that occur through relationships with frontline staff.

1. *Outcomes for Service Goals:*

The outcome of these goals is that all customers have access to quality integrated services that meet their needs efficiently and seamlessly. Frontline staff are empowered to meet service integration goals and have the support they need to meet these goals through ongoing professional development and training.

1. *Application of the Service Goals for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. WIOA partners support service integration by identifying and empowering a leader from each title who will engage in ongoing communication and relationship building.
3. WIOA partners must be familiar with WIOA eligibility and suitability and are responsible for ensuring appropriate referrals and referral outcomes, working effectively to leverage partner resources for the benefit of customers, including training and directing applicable staff.
4. Consider the customer’s experience and the processes involved during service delivery, such as referrals and their outcomes. Necessary assessments should be reviewed, streamlined, and coordinated through continuous collaboration with partners. Collaboration among partners should ensure the alignment of these assessments.
5. Individual service plans and goal statements are used to provide and coordinate services and guide follow-up. These plans are continuously updated to respond to changing customer needs and evaluated for referral opportunities on an ongoing basis.
6. Customers receive timely and coordinated access to all WIOA employer and job seeker services, whether on-site, through technology, at a partner site, or by other appropriate and accessible community services.
7. Career Pathways Goal.
8. *Vision for Career Pathways Goals:*

Integrated services are shaped through the lens of career pathways defined by the State.

1. *Outcomes for Career Pathways Goals:*

A shared philosophy among education, workforce development, employers, and economic development regarding college and career pathways aims to enable Illinois residents to progressively build toward college and career success through aligned education and training, which may include stackable credentials leading to sustainable employment opportunities.

1. *Application of the Career Pathways Goals for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. The workforce development system will create strong partnerships with community programs to streamline services and provide funding for the wrap-around support needed for career pathways.
3. Service integration will seek employer input to ensure that pathways investments align with the needs of employers and prioritize career pathways that align with future employer demands.
4. Current and timely labor market information informs career planning and sector-based initiatives.
5. Information Goals.
6. *Vision for Information Goals:*

Partners continually use a range of information gathered to make informed decisions and improve integrated services to provide excellent customer service.

1. *Outcome for Information Goals:*

Decisions are made utilizing all available information and data collected, including but not limited to customer feedback, labor market research, program performance, and evaluations.

1. *Application of the Information Goals for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. All partners will share information on a continual basis.
3. All partners share national and state policies, procedures, and guidance with each other and use this information to make local decisions.
4. The design and delivery of workforce services are guided by current and timely labor market information.
5. One-Stop Operators will facilitate ongoing, consistent communication among local partners.
6. Customer information will be shared, as appropriate and feasible, with all partner programs and services following confidentiality requirements.
7. Partners will inform customers of their Appeal Rights.
8. Evaluation Goal.
9. *Vision for Evaluation Goal:*

State and local workforce board expectations drive the evaluation of one-stop performance, operations, and compliance for service integration.

1. *Outcome of Evaluation Goals:*

The outcome of this goal is that Partners evaluate local service integration efforts regularly to identify and implement continuous improvement opportunities.

1. *Application of the Evaluation Goals for all Stakeholders, such as State and Local Partners, Local Workforce Innovation Boards (LWIB), and One-Stop Operators (OSO) as applicable:*
2. Partners must create and use customer satisfaction tools, analyzing the feedback on a continual basis.
3. Partners must conduct an evaluation using The IWIB Evaluation Toolkit to assess local service integration efforts and create evidence-based policymaking and system design.
	* 1. **Service Integration Implementation**
4. The Illinois Workforce Innovation Board (IWIB) will regularly update the State’s one-stop certification criteria and evidence measures to reflect current service integration goals. Each LWIB will be responsible for assessing the level of service integration in all seven functional areas for the local one-stop system, which includes all one-stop center(s) it oversees. One-Stop Operators will lead partners in an annual service integration self-assessment (attached) to evaluate progress, identify improvement targets, and align with other deadlines as appropriate, such as MOU guidance.
5. Each LWIB will be responsible for assessing the level of service integration in all seven functional areas for the local one-stop system, which includes all one-stop center(s) it oversees. This assessment requires annual updates to evaluate progress and identify improvement targets. A self-assessment tool is available as an attachment to the policy for use by LWIBs.
6. If any local partner cannot fulfill the provisions of this policy, the matter will first be taken to the appropriate State partner(s).
7. If a resolution is unsuccessful at that level, the local board will attempt to resolve the matter.
8. If this is unsuccessful, relevant procedures established by the State Interagency Technical Assistance Team and/or State Leadership Team will be pursued, followed by consultation with the IWIB and Governor’s Office.

1. A complete One Stop Certification and self-assessment must be on file and must describe how the results were used to improve service integration efforts.

# Appendix B

Schedule of Planning Events for Service Integration Self-Assessment

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Event** | **November** | **December** | **January** | **February** | **March** |
| **Overall Process (LWIBs and One-Stop Operators)** | 1. Review Updated Regional and Local Planning Guidelines
2. Review Updated Service Integration Policy
3. Send message out to all agencies/stakeholders regarding the self-assessment process
4. Complete logistics for LWIA service integration meeting
* Set date, time, and location
* Identify partner agencies/stakeholders
* Send meeting “Save the date”
* Determine any needed material, refreshments, equipment
 | 1. Hold LWIA service integration meeting
* Complete self-assessment as a group
* Set priorities and do action planning as a group
1. Circulate draft self-assessment to LWIB members and one-stop partners for review and comment
2. Utilize outcomes and discussions to frame content for the regional and local plans
 | 1. Review comments and amend self-assessment
2. Incorporate into the local and regional planning documents
 | 1. Regional and local plan posted for public comment period not to last more than 30 days
 | 1. Regional and local plan approved by Local Board and submitted to the Governor)
 |
| **WIOA Partner Agencies/Stakeholders Planning**  | 1. Identify leadership, management, front line staff to participate
2. Send meeting information
 | 1. Review draft self-assessment and provide comments to LWIB and One-Stop Operator
 |  |  |  |

# Appendix C

# Partners List

Core Partners

#

# Title I Programs:

The WIOA Title I Adult Program is a program that addresses the employment and training needs of adult job seekers, based on eligibility requirements established at state and local levels. Services focus on career and training services, as well as case management. Providers of these services are identified locally by Local Workforce Innovation Boards.

The Title I Dislocated Worker Program is a program that addresses the employment and training needs of job seekers that have recently lost their position for a variety of reasons. Services focus on career and training services, as well as case management. Providers of these services are identified locally by Local Workforce Innovation Boards.

The Title I Youth Program is a program that addresses the Career Pathway support, employment and training needs of youth, with an emphasis on out-of-school youth. Services focus on education, career and training services, as well as case management. Providers of these services are identified locally by Local Workforce Innovation Boards.

# Title II Program:

WIOA Title II, the Adult Education and Family Literacy Act (AEFLA), provides states with funding for a variety of services to help adults develop basic skills (examples include reading, writing, math, English language proficiency), transition to postsecondary education and training, and gain employment. The program serves adults who are at least 16 years of age and not currently enrolled, or required to be enrolled, in high school.

# Title III Program:

WIOA Title III Services are also referred to as the Wagner-Peyser Act Program. These services are operated from the state level and include the management of the state’s Labor Market Information and the services to business sectors that generate the “job order” information that is a basis for labor exchange.

# Title IV Program:

WIOA Title IV is known as the Amendments to the Rehabilitation Act of 1973 and includes Vocational Rehabilitation (VR) Services. All states have a VR agency that addresses Career and Training services for individuals with disabilities. Many states have two VR agencies, a general agency and a VR agency that focuses on career and training supports for individuals who are blind. In states where there are two VR agencies, both function as Core State Partners.

**Required Partners**

# Section V of the Older Americans Act

**The Senior Community Service Employment Program** (SCSEP), designed to respond to the needs of older jobseekers with barriers to employment, offers training for low-income, unemployed seniors 55 years and older. Authorized by the Older Americans Act, SCSEP provides them with part-time jobs working in local nonprofit, government, and faith-based agencies providing services in the community.

Carl D. Perkins Act programs (post-secondary)

**The Carl D. Perkins Career and Technical Education Act of 2006** (Perkins IV) is a source of federal funding to states and discretionary grantees for the improvement of secondary and postsecondary career and technical education programs across the nation. The purpose of the Act is to develop the academic, career, and technical skills of secondary and postsecondary students in career and technical education programs.

Trade Act

**The Trade Adjustment Assistance** (TAA) **program** is a federal entitlement program authorized by the Trade Adjustment Assistance Reauthorization Act of 2015. The TAA Program provides aid to workers who lose their jobs or whose hours of work and wages are reduced as a result of foreign trade. Petitions for TAA are filed with the U.S. Department of Labor.

Community Services Block Grant

**The Community Services Block Grant** (CSBG) provides funds to alleviate the causes and conditions of poverty in communities. Discretionary grants are available at the statewide or local level, or for associations with demonstrated expertise in addressing the needs of low-income families.

Housing and Urban Development

The **U.S. Department of Housing and Urban Development** (HUD) offers the **Job Plus** program, which provides services to public housing residents to support employment including job placement, career counseling and educational services. Federal funds are allocated through a competitive grant process.

Unemployment Insurance

**Unemployment Insurance** (UI) is a program jointly financed through federal and state employer payroll taxes. The Federal Unemployment Tax is used to fund state workforce agencies. The state unemployment tax is used for the payment of benefits to eligible unemployed workers. In order to continue to receive UI payments, participants must participate in programs that assist them with finding a job.

Jobs for Veterans State Grants

The **Jobs for Veterans State Grants** (JVSG) program provides federal funding through a formula grant to 54 State Workforce Agencies to hire dedicated staff to provide individualized career and training-related services to veterans and eligible persons with significant barriers to employment and to assist employers fill their workforce needs with job-seeking veterans.

Second Chance Act (Corrections)

Programs offered under the **Second Chance Act** of 2007 are intended to break the cycle of criminal recidivism and to help those formerly incarcerated to return to their communities. Re-entry programs provide employment and training services to individuals who have been released from jail or prison or who are preparing to be released. Funding for this program is provided through a competitive grant program to nonprofit organizations on a periodic basis.

Temporary Assistance to Needy Families (TANF)

The **Temporary Assistance for Needy Families** (TANF) program provides block grant funds to states to provide families with financial assistance and support a range of services to improve employment opportunities. Federal funds are allocated based on historical funding levels.

Other Title I Programs

The **Job Corps** program was reauthorized by WIOA and is a comprehensive, residential education and job-training program for at-risk youth, ages 16-24. Private companies, state agencies, federal agencies and unions recruit young people to participate in Job Corps, where they can train for and be placed in jobs. Job Corps centers are operated for the U.S. Department of Labor by private companies through competitive contracting processes, and by other federal agencies through interagency agreements.

The **Migrant and Seasonal Farmworker Program** assists migrant and seasonal farmworkers and their dependents by providing employment and training services. Formula grants are awarded to local organizations based on the state’s share of farmworkers who are eligible for enrollment.

The **Indian and Native American Program** provides employment and training services to qualifying American Indians, Alaska Natives and Native Hawaiians. Federal funds are allocated on a formula basis to Indian and Native Americans (INA) grantees based on the share of Native American persons in the designated INA area living in poverty and the share of unemployed Native Americans in the designated INA service area.

The **YouthBuild** program is a community-based alternative education program that provides job training and educational opportunities for at-risk youth ages 16-24. Youth learn construction skills while building or rehabilitating affordable housing and earn their GED or high school diploma. The YouthBuild program is funded via competitive grants.

**Other Partners**

*Local boards have the flexibility to include additional partners in one-stop centers.*

Medicaid Waiver Services

Medicaid Waivers help provide services to people who would otherwise be in a nursing home or hospital to receive long-term care in the community.

Developmental Disability Services

*Developmental Disabilities* is an umbrella term that includes *intellectual disability* but also includes other disabilities that are apparent during childhood. Agencies who serve individuals with developmental disabilities offer job training and placement as well as independent living skills.

Mental Health Agencies

Mental Health Services can include assessment, diagnosis, treatment or counseling in a professional relationship to assist an individual or group in alleviating mental or emotional illness, symptoms, conditions or disorders. This may also include job training and placement as well as independent living skills.

Community Rehabilitation Provider Agencies

Community Rehabilitation Providers are agencies or individuals approved to provide employment support to individuals with disabilities served by the Bureau of Rehabilitation Services and/or the Department of Health and Human Services Office of Adult Mental Health Services.

Supplemental Nutrition Assistance Program

The Supplemental Nutrition Assistance Program (SNAP) is the program formerly known as food stamps. It is a federal nutrition program overseen by the U.S. Department of Agriculture.

Centers for Independent Living

The Rehabilitation Act describes a center for independent living as a consumer-controlled, community-based, cross-disability, nonresidential private nonprofit agency that is designed and operated within a local community by individuals with disabilities and provides an array of independent living services.

Transportation Authorities

A transit district or transit authority is a special-purpose district organized as either a corporation chartered by statute, or a government agency, created for the purpose of providing public transportation within a specific region.

K-12 School Districts

A local educational agency (LEA) is a public board of education or other public authority within a state to direct a public elementary school or secondary school in a city, county, township, school district or for a combination of school districts or counties that is recognized as an administrative agency for its public schools.

# Appendix D

# Self-Assessment Identifying Information (Cover Page)

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| --- |
| Local Area Number/Region: Click or tap here to enter text. |
| Name, Title and Organization of Contact Person: Click or tap here to enter text. |
| Contact Phone Number: Click or tap here to enter text. | Contact E-mail: Click or tap here to enter text. | Date Self-Assessment Submitted to IWIB (XX/XX/XXXX): Click or tap to enter a date. |
| WIOA Partner Organizations Participating in Self-Assessment: Click or tap here to enter text. |
| Documents to be Included in the Submission: [ ]  Report on the Process and Results Presented to the LWIB [ ]  Self-Assessment [ ]  Other: Click or tap here to enter text. |

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| **Goal 1: Customer-Centered Design Goals** | **Application Point a. Customer input is collected on an ongoing basis from local users (including One Stop walk-in customers, enrolled participants, and employers) and, at a minimum, evaluated annually by partners.** | **Application Point b. Customer input gathered from local users is used to evaluate and improve technologies, programs, services, interactions, accessibility, and environments within the local area. Based on customer input, local partners will propose improvements and a timeline for implementation.** | **Application Point c. The LWIB will set the expectation for the One Stop Operator (OSO) to manage service integration initiatives in the OSO scope of work. The OSO will report to the Local Workforce Investment Board (LWIB) on service integration initiatives, timelines, and progress.** | **Application Point d. Partner staff will provide system users access to other options for feedback outside of an annual input process and be made aware of complaints procedures and appeal rights. Workforce Innovation and Opportunity Act (WIOA) partners will not retaliate against users who provide negative feedback, complaints, or make appeals.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point.**  |
| **Application Point a.** Customer input is collected on an ongoing basis from local users (including One Stop walk-in customers, enrolled participants, and employers) and, at a minimum, evaluated annually by partners. |
| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point a.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** Customer input gathered from local users is used to evaluate and improve technologies, programs, services, interactions, accessibility, and environments within the local area. Based on customer input, local partners will propose improvements and a timeline for implementation. |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point b.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point c.** The LWIB will set the expectation for the One Stop Operator (OSO) to manage service integration initiatives in the OSO scope of work. The OSO will report to the LWIB on service integration initiatives, timelines, and progress. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point c.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point c.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point c.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point d.** Partner staff will provide system users access to other options for feedback outside of an annual input process and be made aware of complaints procedures and appeal rights. WIOA partners will not retaliate against users who provide negative feedback, complaints, or make appeals. |
| **Strategy for Application Point d:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point d.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point d.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point d.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point d.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point d.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |

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| **Goal 2: Partner Staff Goals** | **Application Point a. Cross-training and program information resources addressing the roles, services, performance expectations, and eligibility requirements of all WIOA partner programs are provided for all partner staff, including information and encouragement in acquiring professional credentials.** | **Application Point b. Communication across partners is consistent, comprehensive, and timely.** | **Application Point c. All partner staff receives current and relevant professional development to service integration goals.** | **Application Point d. All partner staff are treated as valued and respected team members.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point.**  |
| **Application Point a.** Cross-training and program information resources addressing the roles, services, performance expectations, and eligibility requirements of all WIOA partner programs are provided for all partner staff, including information and encouragement in acquiring professional credentials. |
| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point a.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** Communication across partners is consistent, comprehensive, and timely. |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point b.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point c.** All partner staff receives current and relevant professional development to service integration goals. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point c.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point c.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point c.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  |       |
| **Application Point d.** All partner staff are treated as valued and respected team members. |
| **Strategy for Application Point d:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point d.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point d.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point d.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point d.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point d.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |

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| **Goal 3: Intake and Assessment Goals** | **Application Point a. Customers provide basic information once through a collaborative intake process or information-sharing across programs.** | **Application Point b. During intake, customers are provided an overview of partner services, eligibility, and suitability requirements by appropriate partner staff.** | **Application Point c. An open dialogue during intake and a comprehensive assessment(s) between partner staff and customers leads to informed choice and becomes the foundation of a service plan.** | **Application Point d. If partners use different assessments for the same purpose, they must designate a single assessment to the extent possible.** | **Application Point e. Partners inform and support customers throughout the process to secure the documents and verification needed for program participation.** | **Application Point. f. Partners will review and apply asset-based and barrier-reduction practices to intake and assessment processes while using best practices to protect customer confidentiality and reduce stigmas of accessing public services.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |  |  |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point.**  |
| **Application Point a.** Customers provide basic information once through a collaborative intake process or information-sharing across programs. |

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| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** During intake, customers are provided an overview of partner services, eligibility, and suitability requirements by appropriate partner staff.  |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point b.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point c.** An open dialogue during intake and a comprehensive assessment(s) between partner staff and customers leads to informed choice and becomes the foundation of a service plan. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point c.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point c.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point c.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point d.** If partners use different assessments for the same purpose, they must designate a single assessment to the extent possible.   |
| **Strategy for Application Point d:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point d.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point d.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point d.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point d.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point d.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point e.** Partners inform and support customers throughout the process to secure the documents and verification needed for program participation. |
| **Strategy for Application Point e:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point e.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point e.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point e.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point e.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point e.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point. f.** Partners will review and apply asset-based and barrier-reduction practices to intake and assessment processes while using best practices to protect customer confidentiality and reduce stigmas of accessing public services. |
| **Strategy for Application Point f:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point f.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point f.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point f.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point f.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point f.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |

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| **Goal 4: Service Goals**  | **Application Point a. WIOA partners support service integration by identifying and empowering a leader from each title who will engage in ongoing communication and relationship building.** | **Application Point b. WIOA partners must be familiar with WIOA eligibility and suitability and are responsible for ensuring appropriate referrals and referral outcomes, working effectively to leverage partner resources for the benefit of customers, including training and directing applicable staff.** | **Application Point c. Consider the customer’s experience and the processes involved during service delivery, such as referrals and their outcomes. Necessary assessments should be reviewed, streamlined, and coordinated through continuous collaboration with partners. Collaboration among partners should ensure the alignment of these assessments.** | **Application Point d. Individual service plans and goal statements are used to provide and coordinate services and guide follow-up. These plans are continuously updated to respond to changing customer needs and evaluated for referral opportunities on an ongoing basis.** | **Application Point e. Customers receive timely and coordinated access to all WIOA employer and job seeker services, whether on-site, through technology, at a partner site, or by other appropriate and accessible community services.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |  |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point**.  |
| **Application Point a.** WIOA partners support service integration by identifying and empowering a leader from each title who will engage in ongoing communication and relationship building. |
| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point a.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** WIOA partners must be familiar with WIOA eligibility and suitability and are responsible for ensuring appropriate referrals and referral outcomes, working effectively to leverage partner resources for the benefit of customers, including training and directing applicable staff. |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point b.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point c.** Consider the customer’s experience and the processes involved during service delivery, such as referrals and their outcomes. Necessary assessments should be reviewed, streamlined, and coordinated through continuous collaboration with partners. Collaboration among partners should ensure the alignment of these assessments. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point c.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point c.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point c.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point d.** Individual service plans and goal statements are used to provide and coordinate services and guide follow-up. These plans are continuously updated to respond to changing customer needs and evaluated for referral opportunities on an ongoing basis.   |
| **Strategy for Application Point d:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point d.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point d.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point d.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point d.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point d.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point e.** Customers receive timely and coordinated access to all WIOA employer and job seeker services, whether on-site, through technology, at a partner site, or by other appropriate and accessible community services. |
| **Strategy for Application Point e:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point e.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point e.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point e.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point e.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point e.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |

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| **Goal 5:****Career Pathways Goal**  | **Application Point a. The workforce development system will create strong partnerships with community programs to streamline services and provide funding for the wrap-around support needed for career pathways.** | **Application Point b. Service integration will seek employer input to ensure that pathways investments align with the needs of employers and prioritize career pathways that align with future employer demands.** | **Application Point c. Current and timely labor market information informs career planning and sector-based initiatives.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point.**  |
| **Application Point a.** The workforce development system will create strong partnerships with community programs to streamline services and provide funding for the wrap-around support needed for career pathways. |
| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point a.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** Service integration will seek employer input to ensure that pathways investments align with the needs of employers and prioritize career pathways that align with future employer demands. |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point b.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point c.** Current and timely labor market information informs career planning and sector-based initiatives. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point c.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point c.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point c.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |

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| **Goal 6 Informationn****Goals:**  | **Application Point a. All partners will share information on a continual basis.** | **Application Point b. All partners share national and state policies, procedures, and guidance with each other and use this information to make local decisions.** | **Application Point c. The design and delivery of workforce services are guided by current and timely labor market information.** | **Application Point d. One-Stop Operators will facilitate ongoing, consistent communication among local partners.** | **Application Point e. Customer information will be shared, as appropriate and feasible, with all partner programs and services following confidentiality requirements.** | **Application Point f. Partners will inform customers of their Appeal Rights.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |  |  |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point.**  |
| **Application Point a.** All partners will share information on a continual basis. |

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| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point a.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** All partners share national and state policies, procedures, and guidance with each other and use this information to make local decisions. |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point b.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point c.** The design and delivery of workforce services are guided by current and timely labor market information. |
| **Strategy for Application Point c:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point c.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point c.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point c.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point c.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point d.** One-Stop Operators will facilitate ongoing, consistent communication among local partners. |
| **Strategy for Application Point d:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point d.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point d.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point d.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point d.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point d.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point e.** Customer information will be shared, as appropriate and feasible, with all partner programs and services following confidentiality requirements. |
| **Strategy for Application Point e:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point e.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point e.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point e.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point e.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point e.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point f.** Partners will inform customers of their Appeal Rights. |
| **Strategy for Application Point f:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point f.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point f.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point f.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point e.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point f.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |

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| **Goal 7: Evaluation Goals** | **Application Point a: Partners must create and use customer satisfaction tools, analyzing the feedback on a continual basis.** | **Application Point b. Partners must conduct an evaluation using The IWIB Evaluation Toolkit to assess local service integration efforts and create evidence-based policymaking and system design.** |
| For each application point please rank your area’s Level of Integration of Goal Application according to the following scale. 1. This application point is not occurring nor is currently being planned.
2. This application point is currently being planned.
3. This application point has been planned and is occurring on an ongoing basis.

Click or tap on the grey boxes below to choose your selection. |
| Level of Integration of Goal Application |  |  |
| **For each application point that use the Planning Tool Below to describe how your area is planning and/or implementing each application point.**  |
| **Application Point a:** Partners must create and use customer satisfaction tools, analyzing the feedback on a continual basis. |
| **Strategy for Application Point a:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point a.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point a.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point a.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point a.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point a.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |
| **Application Point b.** Partners must conduct an evaluation using The IWIB Evaluation Toolkit to assess local service integration efforts and create evidence-based policymaking and system design. |
| **Strategy for Application Point b:**What specific tactics will we use to address the application point? | Click or tap here to enter text. |
| **Key Players for Application Point b.** Who is responsible? Who else should be involved? | Click or tap here to enter text. |
| **Expected Outcomes for Application Point b.** What will be the result of these strategies? | Click or tap here to enter text. |
| **Timeline for Application Point b.**What is the due date of each expected outcome? | Click or tap here to enter text. |
| **Questions/Needed Assistance for Application Point b.** What questions do you have? | Click or tap here to enter text. |
| **Technical Assistance: Does your local area need technical assistance on Application Point c.?** | [ ]  YES[ ]  NO |
| **Technical Assistance: If YES, please specify.**  | Click or tap here to enter text. |

1. These definitions are working definitions and may change as current and future IWIB and WIOA workgroups and committees meet to develop system standards and policies. [↑](#footnote-ref-2)
2. These definitions are working definitions and may change as current and future IWIB and WIOA workgroups and committees meet to develop system standards and policies. [↑](#footnote-ref-3)