



Integrated

SERVICE DELIVERY

TOOLKIT

INTEGRATED SERVICE DELIVERY TOOLKIT

This toolkit provides ideas, strategies and resources for integrating service delivery in the public workforce system.

As federal resources continue to diminish the importance of partnership and integration continues to increase. It is becoming more important than ever for workforce partners to streamline and link their service strategies to benefit job seeker and employer customers.

Customers are the foundation of service integration; multi-program services are aligned in a manner that benefits job seeker and employer customers. Budgets and resources are also aligned in an integrated system. Other benefits of service integration include customer outcomes (better performance results) and more effective utilization of staff.



BENEFITS of Integrated Service Delivery

- Economize scarce resources
- Enhance job seeker/claimant customer outcomes
- Promote more effective services to employers
- Enhanced data availability
- Improve performance accountability



This Toolkit is designed for public workforce system leaders and practitioners. It will provide you with a systematic approach for integrating service delivery to improve the experience of job seeker and business customers. In addition to suggestions and ideas on a variety of integration-related topics, you will find myriad examples of innovative solutions currently in use by your peers.

We urge you to borrow, adapt and implement those strategies that make the most sense for your State or local system.

The toolkit is organized around three principal “levers” that can be used to increase connectivity and assist States to move forward with integrated service delivery, with the ultimate goal of getting the job seeker employed or reemployed and the business customer applicants with the talent and skills needed. The “levers” can be described under three broad categories: policy, program, and IT infrastructure. Sometimes these categories intersect but the tools, promising practices, and examples included here generally fall under these three areas of activity.

Toolkit Steps

No matter where your State (or local area) is on the continuum of service delivery integration, you will find helpful tools and resources to move forward. We invite you to use this toolkit and follow these steps as you work to integrate your service delivery system:



1 Examine ways your State might move toward integration by **adopting policies that promote alignment;**



2 **Design and implement specific program changes to enhance integrated service delivery** and provide the customer with access to real-time information and seamless delivery of services; and,



3 **Align the Information Technology (IT) systems** supporting your integrated service delivery system.

Let's begin by examining what changes can be made within the Policy area to move the needle toward integrated service delivery.

1



Identify Policies to Support an Integrated Service Delivery System

Since funds for the delivery of workforce services are provided under a variety of programs with very specific rules and requirements, it is critical that States identify ways to shape the policies governing services into a single, focused and coordinated system. This process begins at the top levels of leadership within and across workforce programs in a State. Ideally, a framework spelling out the critical role each partner plays within the integrated system can serve as a “road map” for aligning and integrating the delivery of workforce services.

States putting together a team to work on integrating service delivery may want to review examples of State team configuration, such as [Reemployment Connections State Team Sample Membership, Roles and Responsibilities](#), the [Oklahoma Workforce System Building and Certification Toolkit](#) (see page 9), or [Sample partner agreements](#) as developed in the Career Pathways project. As a State team works to create an action plan for integrating service delivery, it will be important to determine where the State stands on the integration continuum. The [Reemployment Strategies Self-Assessment Tool](#) will help State-Level Workforce Program professionals and State-Level Information Technology (IT) professionals get a picture of the current levels of integrated service delivery.

Spending the time to set a vision and develop policies that promote integration – and then communicating that vision and policies – will pave the way for acceptance by staff and foster a smooth implementation process. It is important to know where you are now, both with arrangements of program elements and information technology, if you are going to move to a new, more integrated service delivery system. The following resources may be useful for your team:

A. Establish the vision for integrated service delivery

States may find the [Reemployment Strategies Technical Assistance Project Self-Assessment Tool](#) of value. It was designed for States participating in the Reemployment Strategies Technical Assistance Project to establish and document the status quo before they embarked on concerted efforts to further integration of services. This tool includes a series of questions to help State leaders examine practices across programs and a number of other policy, program and IT issues related to building an integrated system.

The Self-Assessment also probes: one-stop center configuration and staff capacity; the State’s registration and intake process; service delivery offerings (triage); co-enrollment policies and practices; specific program requirements for Worker Profiling and Reemployment Services (WPRS) and Reemployment and Eligibility Assessment (REA); and, its communication plan to conduct outreach and otherwise engage with customers.



The [Integration Indicators Guide for Workforce Programs](#) document can also serve as a self-assessment guide and checklist for State and local workforce officials to determine the current level of integration in their system. It is divided into State and local governance sections, and includes integration criteria related to organization, policy, planning, and accountability. Operational issues are also covered in the guide.

The tutorial, [Fully Articulating Your Vision: Using Logic Models to Support](#) may be helpful. Its goal is to help you create logic models as part of your program planning process. You will learn how to articulate the goals that support your vision, identify what you plan to do with your program resources, and show how you will achieve results.

States or local areas needing to educate partners and policy-makers (such as board members or elected officials) may want to check [The Workforce Primer: Introduction to the Public Workforce Investment System](#). This resource gives current and prospective partners a high-level introduction to the public workforce development system. Whether these partners or policy makers represent an employer, a labor organization, a community-based organization or another new or prospective partner, you'll find access through this Workforce Primer to dozens of online resources.

The [Iowa Workforce Development: Integration Policies Handbook](#) provides a good example of a state policy (pp. 1-6) established to move the state's system toward its vision of integrated service delivery. For another approach where State policy has promoted the integration of service delivery, see [Kansas State Policy on Integration and Functional Organization \(4-04-01\)](#). No matter which approach a State pursues, the policies and procedures set by leadership will establish the foundation for its integrated service delivery system.

B. Engage in joint planning

Having put together the team to build the integrated system and once the overall vision for the State delivery system is developed, team members will need to work together closely, perhaps over extended periods, to accomplish integration goals. It will be important to nurture and support the team over time if the State's goals are to be attained.

To get State staff thinking about the many aspects of work involved in furthering service integration, the [Reemployment Connections State Readiness Action Planner](#) can help States assess their status and progress toward a fully connected team. This resource will help States identify strengths and opportunities in their current systems, and determine if the key players in the State are committed to the process.

For States working to create effective partnerships as basis for service delivery integration, [Partnerships: A Workforce Development Practitioner's Guide](#) outlines key elements of partnering, such as establishing a partnership, establishing processes for working together and sustaining partnerships. This resource offers practical advice developed from examples in Massachusetts.



QUICK START IDEA!

Any State creating a vision for an integrated delivery system should be aware of the vision statement in [A National Call for Innovation](#) (beginning on p. 13), which provides an example of a team vision statement focusing on the issue of reemployment.

A State team might also consult the [Reemployment Connections Sample Vision, Mission and Goals](#) as a resource to see examples of a vision and mission statements and sample outcome goals which are used to support the vision.



QUICK START IDEA!

Local areas should consider service mapping as a beginning step in designing the most effective service delivery system. It is particularly important to get a clear picture of who provides which services, to whom, when and why. Once this is clear, and there are common definitions and commitment to the integrated system, a team will be positioned to build and launch a truly integrated system.

Check out this resource: [Career Pathways Initiative Service Mapping Tool](#).

C. Determine resource sharing and ways to leverage resources

Workforce partners will need to determine how funding, staff and services can be aligned and leveraged. This will ensure services provide the maximum value for customers. For example, if one partner has a thorough and cost-effective assessment process, could the results be accepted among the programs serving that customer? Such an approach could conserve resources, avoid repeated customer testing and provide high-quality feedback for all partners.

States may want to check out Section B of the [Reemployment Connections State Readiness Action Planner](#), where a number of questions are posed that may illuminate a State's posture relative to resource sharing.

Also, the paper [Partnerships: A Workforce Development Practitioner's Guide](#) has ideas about how to find resources to support a partnership among workforce agencies/entities working toward integrated service delivery (see pp. 71-73).

States may find the materials and suggestions in the [Federal Funding for Integrated Service Delivery: A Toolkit](#) to be useful as they work to find ways to share and maximize resources. This resource catalogues a variety of Federal funding source programs, including those targeted for income support, education and training, college and community college access, nutrition, financial services public housing, and more. When designing or redesigning their service delivery system, States and local areas may want to review this toolkit to ensure they don't miss any of these resources potentially beneficial to their customers.

The [State Sector Strategies Coming of Age: Implications for State Workforce Policymakers](#) paper will be a good place to look for ways to shape their policies for those states considering implementing a sectors strategy approach to aligning, streamlining and integrating their services to business (a very good idea). Co-sponsored by the National Governors' Association (NGA) Center for Best Practices and the Corporation for a Skilled Workforce (CSW), this resource provides areas for state action to set a policy framework, examples of state policy, and more.

For an example of a State's effort designed especially to align stakeholder resources within the one-stop center in order to increase customer value, see the guide for New Jersey on [One Stop Process Improvement](#). This tool depicts how a team of practitioners can critically analyze the service delivery process in their area through the eyes of a customer. It helps leaders, managers, and front line professional staff to collaboratively explore methods for aligning available resources and for improving both efficiency and effectiveness.

You can also view a Workforce Innovations Fund (WIF) case study on advancing system alignment and career pathways, the Rhode Island Department of Labor and Training: [On-Ramps to Career Pathways](#). This project involves redesigning a portion of the state's American Job Center service delivery system by piloting multiple entry points to career pathways.



Some state leaders may be interested in coordinating services across a wider spectrum. For these states, staff may want to review other resources. The issue paper, [Coordinating Employment Services Across the TANF and WIA Programs](#). The information presented in this brief comes from interviews with state and local respondents in 8 states and 11 localities. Authors describe 12 strategies for TANF/WIA coordination (see p. 4) that the study sites use and that other locations may choose to replicate.

D. Develop policies on Co-Location

Co-locating workforce system partners in one-stop centers is an important step in reducing costs and enhancing customers' service experience. The co-location of staff from various programs in one location also fosters integration of service delivery, and often generates creative ideas from staff about how to better align and use limited resources. Inviting additional community partners to have a service presence at a one-stop center can also enhance the customer's experience and chances for success, and can increase the relevance of that center in the community.

A good example of State policy requiring co-location as part its integration efforts can be seen in the [Iowa Workforce Development: Integration Policies Handbook](#), referenced above. This State policy focuses on coordinating the workforce delivery system in a more efficient, cost-effective manner while improving services for customers; it addresses co-location and integration of workforce and job training programs and focuses on improving the effectiveness of the regional workforce system. For specific guidance on the physical layout, floor plans and customer flow in workforce system centers, see p. 15 of the Handbook.

Some other examples of co-location as an integral part of integration include:

The Workforce Innovation Fund (WIF) grant summary for the [Metro North Regional Employment Board Project Name: CONNECT](#) provides an example and overview of a project where six non-traditional partners have come together in a local center in the city of Chelsea, MA to co-locate and bundle complementary services for local residents. Partners include: The Neighborhood Developers, Bunker Hill Community College, Career Source, Centro Latino, Metro Credit Union and Metropolitan Boston Housing. The project aims to align and integrate workforce development, education, and human services programs to more efficiently and effectively achieve better results for employers and vulnerable job seekers.

The record of the meeting of the Washington State Workforce Training and Education Coordinating Board, documented in [Removing Barriers – A Report from the Interagency Committee](#), provides an example of how one state created an inter-agency committee to address the value of co-locating staff among workforce partners (p. 8) Note that this piece also shows how the committee addresses the need for streamlined co-enrollment processes (pp. 2-4), and the need for staff cross-training (pp. 5-7).

The WIF grant summary for the [Los Angeles Reconnections Career Academy \(LARCA\)](#) provides an example of a project designed to align multiple youth-serving programs, initiatives, services, and resources to address significant

youth dropout and youth unemployment challenges in the Los Angeles. LARCA targets and serves out-of-school youth through information-sharing agreements and co-location of LAUSD staff on the sites of schools and WIA Youth WorkSource Centers.

Another program wherein co-location is suggested is the Trade Adjustment Assistance Community College and Career Training (TAACCCT) Grant Program, which provides community colleges and other eligible institutions of higher education funds to expand and improve their ability to deliver education and career training programs that can be completed in two years or less – opportunities suited for workers who are eligible for training under the Trade Adjustment Assistance (TAA) program. Among the suggested [Tasks and Assignments for Success Coach/Navigator](#) in TAACCCT is the guidance that co-location in an American Job Center is recommended as early as possible.

E. Consider policies fostering co-enrollment

Co-enrollment of customers in more than one program can increase the probability that resources are available to support the individual on his or her career path. Further, States and local areas are expected to fully align and integrate the delivery of services and co-enrollment across programs. The following resources may provide insight and guidance for States considering co-enrollment policies.

Guidance and Resources Related to Co-Enrollment

- In [Attachment A to Training and Employment Guidance Letter \(TEGL\) 21-00](#), ETA outlined the benefits of co-enrollment and published discussion about perceived barriers to co-enrollment.
- Later, in [Training and Employment Notice \(TEN\) 13-13](#), ETA outlines the benefits of co-enrollment and provides discussion about perceived barriers to co-enrollment and a tool to enhance service delivery.
- States can also view the tutorial [Strategies to Enhance TAA and WIA Performance through Co-Enrollment](#) to gain insight and understanding of co-enrollment data, the benefits and risks of co-enrollment, and strategies to simultaneously enhance co-enrollment and performance outcomes.
- In the issue brief [Co-Enrollment in WIA Youth, Adult and Dislocated Worker Programs](#), decision-makers can review the policies, regulations, and eligibility for co-enrolling WIA Youth participants in WIA Adult and Dislocated Worker programs as an example of co-enrollment strategies.

See also: [Removing Barriers – A Report from the Interagency Committee](#). (pp. 2-4).

F. Ensure all staff statewide understand the vision and steps to arrive at integration

Establishing even the most forward-thinking policies and procedures to foster integration of service delivery will have little effect if those responsible for their execution are not tuned in. A good strategy for communication and staff training must be part of any plan for integrating service delivery. Many staff who have been doing their jobs the same way over time will need support, guidance and reinforcement to adopt more integrated approaches in their day-to-day work.

The Kentucky Department for Workforce Investment “Workforce Academies” model is a good example of how a State can inform and train staff regarding their role in implementing the State’s integration policies and procedures. This model has played a key role in supporting the transformation of that State’s workforce staff through personal and professional growth opportunities. The academy is providing several phases of training for its workforce staff. Phase 1 of the training, completed in June 2013, focused on the establishment of a foundation for the Kentucky workforce system through a common vision. (See p. 17 of the [KY WIA PY 2013 Annual Report](#)). The initial part of Phase 2 focused on enhanced customer service, as outlined in the common vision, while the final 2014 training was developed for leadership staff from partner agencies and focused on moving beyond simply managing staff to intentionally leading them toward transformation by creating a common vision, inspiring people to want to change, and empowering them to have an active role in the process.

See also: [Removing Barriers – A Report from the Interagency Committee](#), (pp. 5-7).



G. Identify opportunities to connect automated systems

Since all States must share some data between and among programs (e.g. UI claimant data is sent to Wagner-Peyser staff for those claimants identified as most likely to exhaust their UI benefits under requirements of the Profiling system) states with emerging promising practices have policies and procedures that encourage or require registering all UI claimants with Wagner-Peyser early in the claim cycle.

These States work to optimize data sharing to improve the quality, timing and effort needed for staff to provide quality customer services. Those States with cutting-edge practices have integrated systems and processes that capture the skill sets and experience of all claimants and other job-seekers at first contact with the workforce system (see the [IT Applications Technical Documentation](#) for details and supportive tools for states interested in the Integrated Workforce Registration (IWR) application). Whether the customer is filing for UI benefits or simply logging on to check for job openings, the system identifies the customer’s skills and experience and begins immediately to provide the customer with information and service opportunities to meet his or her needs.

The very best systems have data exchange and processing occurring on the back-end to examine detailed information about the job seeker, the latest labor market information (LMI), and the requirements of job openings from business customers. As a result, the job seeker experiences a continuous, real-time flow of information and services leading to positive career advancement, and the business customer receives the best possible job applicant referral.

Once these opportunities are identified, State policy makers can formulate a plan to establish the necessary data sharing agreements to establish these connections. Look for system linkages in your state that can be accomplished quickly and easily to get the process started. States can find discussion about data sharing and improved information management in [Improving Case Management and Increasing Workforce System Integration in the Trade Adjustment Assistance \(TAA\) Program](#), and can see a good example of an agreement between local workforce boards here: [Data Sharing and Confidentiality Agreement](#).

H. Identify an approach for integrated registration and a common “front-door” across programs

Integrated Workforce Customer Registration (or IWR) is one of the four key transformational elements identified in the [A National Call for Innovation: Rethinking Reemployment Services for UI Claimants](#) (see pp. 2, and 19-20). This paper recognizes that customer contact begins with intake and emphasizes the importance of streamlining the registration process to quality customer service. A policy for creating a common “front-door” will remove any duplication in the information customers provide at a physical one-stop career center or virtual sites. Data collected through the registration system should be stored in one or more connected data management systems and should be available to inform customer service throughout the customer’s interaction with the integrated system.

Any state or local area serious about integrating its service delivery system simply must be familiar with the [Integrating Intake Among Workforce Programs Resource Page](#). This comprehensive web site leads the user to an amazing number of resources. Begin with the [Integrating Intake Model](#) tab to see graphic and narrative descriptions of how things could work in your area. Don’t miss the [Download PDF](#) link under the Integrated Intake Continuum graphic: this will lead you to the results of an environmental scan of useful resources on integrated intake at one-stop career centers and across workforce development systems, with sections on: Leadership; Pilots



and Staff Feedback; Management Information Systems (and a separate section on Management Information System Supports); Policy Alignment; and, Staffing and Customer Flow. Each of these sections contains hyperlinks to numerous reports, policy documents, webinars, and toolkits.

The [Integrated Intake Continuum](#) web site gives a vision for Integrated Intake: A coordinated, integrated approach to intake which is customer-centered, with policies, infrastructure, and training to support integrated case management, service delivery, and tracking by capturing customer information at intake only once. Subsequent customer information updates can be used to seamlessly transition customers to all needed services, and to establish eligibility for various program resources available across the delivery system.

And *please*, do not overlook the [Download PDF](#) link at the lower right on the [Integrating Intake Among Workforce Programs Resource Page](#). This link to the Integrating Intake Issue Brief provides entry to another wealth of information on key strategies for creating a common intake process, with lots of examples of state and local tools, processes, and policies designed to create or improve inte-grated intake.



At the stroke of a pen, we made three-quarters of our employees incompetent.

Utah State leader during transition



Design & Implement Specific Program Elements of an Integrated Service Delivery System

Once policies are in place and communicated uniformly to staff throughout the State, the next step is to implement integrated service delivery strategies. In this section we'll examine several program features to move toward an integrated service delivery system.

A. Establish approach for staff cross-training

Once policies are in place and communicated uniformly to staff throughout the State, the next step is to implement integrated service delivery strategies. In this section we'll examine several program features to move toward an integrated service delivery system.

An integrated delivery system must include well-trained staff who not only know their own particular role, but who also have enough information about the basic requirements and operations of other programs to help customers have the best possible workforce system experience. The paper [Strategies for Integrating the Workforce System: Best Practices in Six States](#) provides a review of what several States have done to consolidate, coordinate, and integrate their workforce systems. It addresses how some States move toward integration among multiple workforce development programs within a one-stop system by such means as co-enrollment, staff cross-training, integrated IT systems, or other means; or through cross-program performance measures (see p. 15).

States must remember that changing from a collection of programs delivered in silos to an integrated system characterized by exchange of information across all programs to support real-time decision making by customers and staff can seem like a seismic disruption to staff who may have spent years doing their jobs in the old system. A rigorous and sometimes extended program of cross-training is required.

Here is a good example of staff training to support transition to an integrated system: see p. 17 of the [Kentucky WIA PY 2013 Annual Report](#). The academy accomplishes this purpose by providing several phases of training for its workforce staff.



Research indicates that workers have three prime needs: Interesting work, recognition for doing a good job, and being let in on things that are going on in the company.

Zig Ziglar

B. Employ a continuous real-time triage model, supported by data, to enhance customer service

It is essential that customers know about and can easily access services in the State's integrated service delivery system. To provide a truly integrated system States must organize the delivery of services – labor market information (LMI), job and skills matching, provision of training and other services – into a structure that provides the customer with a seamless experience. The customer interface, whether on a website, on the phone, or in person in a one-stop center, must present information in a user-friendly format providing information about all the services available to that customer. A truly integrated system should:

- Evaluate information about the customer, using assessments to accurately gauge the education, experience, skills and aptitudes
- Display available services from all partner agencies encompassing the integrated system
- Provide job openings on a continual basis so that customers and staff will have current information for each decision the customer makes related to his/her career choices.

Using this system, staff can conduct real-time triage to help develop a viable plan of action for each individual customer based on the latest data available. This system must then be supported by real-time data exchange on the back-end so that the information upon which decisions are based is current and accurate.

The recorded webinar, [Reemployment Connections: IWR/WIPP 101](#), includes a section demonstrating how Mississippi's Workforce Individual Profile Page (WIPP) provides continuously updated information via a customer landing page (see slides and listen to discussion beginning on slide # 17). This enables real-time triage for customers of the system.

As States or local areas plan how a customer gets services from all programs in an integrated system, and in what sequence, they may wish to review the list of Service Mapping instructions from Oklahoma at this site: [Service Mapping Process Completion Instructions](#). The list considers populations served, how services are provided, how services are scheduled, cost of services, where services are provided – all useful considerations when mapping out a system for real-time triage.



QUICK START IDEA!

Begin with those strategies that can be put in place quickly and with a minimum of cost (e.g. moving desks within a center to enhance program alignment, or rolling out in-person or online staff training on a new approach). These early activities will create momentum and make clear to staff that the new way of doing business is real.

Consider the following resources and examples to learn more about the elements of a system for real-time triage supported by real-time data.

1/ Labor Market Information


Quality and current LMI is critical to decision making in the triage process and throughout the customer's tenure in the system. In the paper, [Labor Market Information: Meeting Customer Needs](#), the Workforce Information Council provides examples from 20 States' use of LMI, and includes links to related products as well as contact information for State LMI staff.

For help on how to use LMI in your state or local area, take a look at the [Tangled Up in Data? — Putting Workforce Data to Work in Employment & Education Programs](#). There's information on how to use workforce data to identify growing and in-demand jobs, determine which of them are "good" jobs, and ascertain what preparatory education and training are needed to qualify for them. This resource draws upon the best



governmental and private sector sources, explains them, outlines their strengths and limitations, provides guidance on oft-used terms like "high growth" and "good jobs," and helps users avoid common pitfalls. By all means don't miss the very extensive and detailed resources in ETA's [Guide to State and Local Workforce Data](#), and, for detailed information on how to find and work with specific data groups (e.g., unemployment data, dislocated worker data, employment projections, industry data, geographic data, and economic data), see the [New Quick-Lesson Workforce Data Podcast Series](#) available on the Workforce3One Labor Market Information Win-Win Network.


The workbook from Public/Private Ventures, [Using Data for Success: Five Activities for Workforce Managers to Use with Frontline Staff](#), is for managers to use with frontline staff to help them incorporate LMI into their daily work. Topics include: Telling the Story Two Ways, Lighting up the Dashboard, Analyzing Everyday Data, Fishing for Factors, and Setting Out the Milestones. This resource includes several tools to help managers, including explaining to staff four important concepts related to data, demonstrating how data analysis can lead to improved performance, showing how staff action can result in client success, and more.

States may want to review this two-page brief, [Getting the Message Out: Disseminating Labor Market Information](#), which describes how to disseminate LMI and how to measure impact of LMI distribution efforts. Also, it may be useful to check the  [O*NET Resource Center](#) for LMI tools and resources. The O*NET Sites page provides links to even more resources, such as occupational and career exploration tools. State and



local staff will want to be aware of the [MY NEXT MOVE site](#), which provides easy-to-use search options and career overviews for students and job seekers, and ensure that this great tool is easily available on their state or local area web site. It may be good as well to provide easy access to the [Mi Próximo Paso](#) web site, a Spanish-language version of My Next Move, which enables Spanish speaking career explorers and job seekers to search over 900 different careers. And be sure to also include the [My Next Move for Veterans](#) tool, a web application for veterans transitioning into the civilian workforce, among the LMI tools you provide your customers!

State and local staff can find even more at the [O*NET Resource Center](#). Look for: [Testing and Assessment Consumer Guides](#) for both job seekers and employers; the [O*NET® Toolkit for Business](#) which provides a wealth of background information on the features of O*NET and details O*NET's many uses for human resource professionals and employers; [O*NET® Career Exploration Tools for Developers](#) which explains the application, software codes and downloading information for staff installing or maintaining these tools on web sites; and more.

 [careeronestop site](#) includes tools to help job seekers explore careers, investigate salary and benefit information, research education and training opportunities, plan a job search and browse job sites, write and improve resumes and cover letters, prepare for a job interview, and search for jobs. It presents valuable information to job seekers and students who want to make informed career-planning decisions.

For a good example of how a state has used O*NET skills data to create a free online skills assessment tool, see Minnesota's public career information website, [iSeek](#). This tool allows users to rate themselves on all 35 O*NET skills, then view occupations that are a good match for their skills profile. The tool also includes a "skills matchup" feature, which lets users see where their own skills differ from the average skills of those working in the occupation. The assessment works for novice career explorers and experienced workers alike.

To get an idea about using LMI as a tool for the business customer, be sure to see the [O*NET® Toolkit for Business](#). Even better, check out the [Four E-Tools You Can't Afford To Miss](#) (Employer Locator, My Next Move, mySkills myFuture, and the O*NET Toolkit for Business), part of the Expanding Business Engagement resources page.

For a good example of a state's integrating O*NET tools into its LMI programs and resources to attract new business to the state, see the [Maine Department of Labor](#) web site. This resource shows how Maine businesses provided descriptions of the jobs they need to fill and the Maine Department of Labor searched O*NET data to match occupations to the knowledge, skills, and abilities provided in the job descriptions. In addition, small businesses were helped to develop their employees through training strategies based on O*NET occupational skills information.



QUICK START IDEA!

To facilitate career mobility and economic prospects of their job seeker customers, States may want to provide the link to [mySkills myFuture](#), an online skills transferability tool that allows job seekers and staff intermediaries to match a worker's occupational skills and experiences with the skills needed in other occupations—or see the [developer resources](#) to import the mySkills myFuture widget right on your page or use a web service to import the data. For any occupation, users can get a list of job listings in their local area (i.e. state or zip code) and click directly through to the hiring company's website. mySkills myFuture is designed for use as either a self-help tool or with the assistance of expert advisers. The [mySkills myFuture Frequently Asked Questions](#) resource gives additional insight into the value and use of this tool.



2/ Job matching and skills matching

The [National Vision](#) spells out the importance of job matching and skills transferability in an integrated workforce delivery system (see pp. 21-22). These functions in the system are tied to the real time triage feature. The National Vision envisions an automated job match feature and suggests that States use available tools to link job seekers to available jobs. The automated assessment tools embedded in the triage process would base job matches on the customer's occupation, certifications or degrees, and/or on basic skills information provided by the job seeker during registration or subsequently. This portion of the National Vision also provides examples of tools and technologies currently available in the public and private domains at the time of publication (September 2010).

New Jersey's On Ramp tool ([New Jersey's On Ramp](#)) is an example of automated job matching. The system identifies suitable job matches for job seekers and ranks them according to the degree of fit. The system also provides employer customers with a list of qualified applicants, and ranks the best matches. The job seeker determines which information the employer sees and how to be contacted.

See also [Utah's Next Generation Labor Exchange System - Summary of Process](#). This piece provides an Executive Summary of Utah's system upgrade underway to improve job seeker, business and staff functionality. The document includes examples of "What Good Looks Like" (beginning on p. 8) for both the employer and job seeker customer.

Finally, States may be interested in reviewing this Practice Brief, [A Framework for Thinking about Job Search Assistance Programs](#), prepared for the Office of Planning, Research and Evaluation in the U.S. Department of Health and Human Services. This document provides a high-level guide for understanding and implementing job search assistance programs in the context of the TANF program.



QUICK START IDEA!

For anyone looking to improve training and other services in their delivery system, we strongly encourage you to visit myriad resources under the [Supporting Resources](#) tab on the [Effective Case Management Resource Page](#).

DON'T MISS this **GO-TO LOCATION** for resources, with links to all sorts of help—from Assessment to Youth Employment, with maps and models and examples and templates.

Please, be our guest!

3/ Training and other services

In an integrated system, customers are aware of the federally-funded training services available to them. This may be conveyed through a variety of means—prominent wording on the State or local website, staff presentations at Rapid Response events, through a center's posted Menu of Services – or all of the above.

While there will always be more job seekers than training funds, and it is also true that many job seekers neither want nor need skills upgrades; training is an area where closer alignment with Wagner-Peyser services can reap dividends for job seekers needing new or updated skills.

Case management is an essential element of integrated service delivery for those customers who require assistance managing their career development process. The Power Point slides in this [Case Management](#) Training session focuses on customer focused case management, explains key items case managers need to know and understand about case management, and details the role of the case manager. The training is intended to help staff motivate the customer and learn what to do when staff do not have the answers that the customer wants. The [Effective Case Management Resource Page](#) is a great place to start; from there, be sure to check out what's behind the tab for the [Effective Case Management Model](#).

Don't forget to include work-based learning in your integrated service delivery system. Check out the ETA OJT Toolkit ([Building the Next Generation OJT Toolkit](#)) which was developed for state workforce agencies and local OJT providers who are beginning or looking to strengthen their OJT offerings. And don't overlook the potential value for your job seeker and business customers in the apprenticeship model. See [Building Registered Apprenticeship Programs; A Quick Start Toolkit](#) for helpful steps and resources to start and register an apprenticeship program, from exploring the apprenticeship model as a workforce strategy to launching a new program.

C. Communication and outreach to customers

We have established that an effective workforce delivery system must ensure customers know the full array of workforce services available to them. This section of the Toolkit discusses ways to reach and inform job seeker customers about the State's workforce system.

All workforce systems use a variety of means to notify customers, including messages on claimant voice systems, emails to customers, targeted follow-ups by career counselors, automatically sending notice of job openings that match the job seeker's skills and experience, and others. Several States have developed innovative methods to reach workforce customers and to make them aware of service opportunities. One example is New York State, where teams of workforce



staff host reemployment service events at libraries, schools and community centers. The events are well-publicized. Read more at [Re-Employ 2012: Helping NY's Job Seekers](#).

The [National Vision](#) includes Social Networking as one of the key transformational elements for an integrated system. Social media promotes virtual exchange of information to identify job openings, training and educational opportunities, benefits information, career planning and guidance. At the time the National Vision was published in 2010, it cited the success of New York State's workforce system with a dedicated Facebook page, the State Secretary of Labor's use of Twitter, Facebook and YouTube to deliver the Department's message. Today, many additional State workforce agencies are using social media to tell customers about their services – and to deliver services, as well. Several examples of social media tools and resources are included below.



QUICK START IDEA!

If you'd like to get some indication of your state's position on developing a social media plan, check out section 6. *Categorizing Your State*, beginning on page 38 of the [State Guide to Building a Social Media Presence](#). This resource presents a series of indicators in four categories which can provide you with some measure of where your state stands on the continuum ranging from "Standing on the Edge" all the way to "Immersed in Social Media."

It is advisable for a State to establish a policy on use of social media before it employs social media tools. Some examples of State social media policies include: the [Mississippi Social Media Policy](#), which shows a State's policy governing use of social media, including using social media to deliver services, and the [Massachusetts Department of Labor and Workforce Development Social Media Policy](#).

States, particularly those just beginning to consider using social media, may gain understanding by looking at the entire draft document, [State Guide to Building a Social Media Presence](#). This Guide provides a wealth of information for States wanting to begin using social media or to enhance their use of these tools. It reviews the work of pilot States' as they developed their social media programs; provides a State Guide to Building a Social Media Presence; details a few Social Media Promising Practices; gives States an assessment tool to gauge where they stand relative to launching a social media effort; and presents a chapter on Developing a State Social Media Plan.

The paper [Social Networking for Workforce Professionals: A Primer](#) introduces the topic of social networking to workforce professionals and educators and provides a general overview of basic social media (LinkedIn, Facebook, and Twitter) use by businesses and job seekers. The recorded webinar, [Examples: Reemployment Connections](#)

[Pilot States Social Media Projects](#), gives the viewer access to subject matter experts who work with social media in Idaho, Minnesota and New York as they discuss in a “chat session” format how their States have approached using social media to support reemployment. The webinar includes the use of various social media platforms to engage and inform job seekers.

Several States go beyond using social media merely to reach and inform customers by using these tools to deliver services. The Massachusetts Department of Labor and Workforce Development provides customers instruction and guidance with its website [Using Social Media in Your Job Search](#). Minnesota uses a blog, [Tips and Techniques for Finding the Perfect Job](#) to communicate with customers about job search methods and activities. Oregon employs a very active and dynamic blog to communicate with customers about changes in labor market information (see [Oregon Workforce & Economic Information](#)).

A visit to the [Idaho Department of Labor](#) website reveals how one State employs social media tools to engage both job seeker and business customers. Through the blog [idaho@work](#), the State agency can maintain continuous communication with Idaho job seeker and employer customers.

The recorded webinar at the Reemployment Connections [Social Media Resource Page](#) lets listeners hear staff from Idaho, Minnesota and New York discuss how their State employs social media to inform and serve customers.

States and local areas should remember the [OJT Toolkit Outreach Materials](#) resource when communicating with employers. This web page provides access to a suite of outreach materials to be used at the local level to work with employers and job seekers. It includes tips for getting organized, a collection of the best examples to help promote OJT services, easily customizable templates, and suggestions to help you develop and implement your outreach plan.

D. Determine business engagement strategy

Any State working to integrate service delivery cannot complete the task without attending to the needs of their business customers. Emerging practice in States with an advanced degree of integration includes policy that requires staff dedicated to serving business, often teams of business service representatives organized around the business customer.



QUICK START IDEA!

If your State is organizing business sector strategies, it can be an ideal time to develop business service teams aligned to sectors. This provides economic development and education partners, as well as business customers, with stable contacts and resources as the strategy is built, implemented and refined.

Many of the same principles used to integrate job seeker service delivery apply to the business customer – connectivity of data on the back end, continuous updating of information, and a user-friendly customer interface. ETA has developed a [Business Services Leadership Toolkit](#), which is a valuable training and resource tool for workforce business service staff. This resource includes a variety of ideas and examples to help States and local areas understand and engage business, deliver quality services and measure results. It contains an entire curriculum for Expanding Business Engagement (EBE), a technical assistance initiative to support the strategic planning and implementation of enhanced business engagement activities within a State. States participating in the initiative focus on improving program performance through the delivery of enhanced business-focused services stemming from a statewide business engagement strategic plan.

Among the many other resources on the EBE website are a number of sample materials from States and local areas designed to engage business with the workforce system. See, for example, [Engaging Business Resources from](#)

[the Field](#). And States should also review this pre-recorded, self-paced session [Expanding Business Engagement: mySkills myFuture Pre-Recorded Webinar](#) to incorporate skills transferability into their business services strategy and to assure better job matches for employers.

As States work to improve their business services they must be aware of sector strategies, which involve approaching workforce and economic development on a regional, industry-focused basis. While not a new approach, sector strategies is gaining momentum across the country as a proven framework for addressing skill gaps and engaging industry in education and training.



QUICK START IDEA!

When thinking about providing integrated services to business customers, state and local staff should be sure their customers are familiar with – and taking advantage of – the many resources found in the [O*NET® Toolkit for Business](#).

States and local areas may want to check the [Employer Engagement Webinar Series: Top 20 "Take Home Now" Strategies for Success](#). This link takes you to the first recorded webinar event of the Employer Engagement Webinar Series which participants a straightforward overview of the “Top 20 Take Home Now Strategies” to engage employers, all drawn from a review of peer grantees that are demonstrating high training and job placement outcomes.

Finally, States should not overlook the potential of social media tools for improving their engagement with and services to business. The previously-mentioned webinar [Training Staff and Customers on Social Media](#) includes subject matter experts who work with social media in three States as they discuss in a “chat session” format how their States have approached using social media with business customers.

E. Deliver Integrated Services to Business via Sector Strategies approach

One significant change emerging in the nation’s workforce system is States’ use of a sector strategies approach, together with regional planning and alignment for in-demand sectors and occupations. As they work to adopt sector strategies to organize their service delivery to business, States can get a variety of tips and resources on the



[Supporting Sector Strategies Initiative: Information & Resources](#) page of the EBE website. It includes information about related technical assistance and peer learning groups.

ETA has developed an entire [Sector Strategies Technical Assistance Initiative](#) including a webinar series. For those just beginning to consider implementing sector strategies, it may be advisable to review [Sector Strategies: Start Planning Now](#), as early as possible. This first webinar in the series is designed to showcase the opportunities ahead in building sector strategies – a key element of a successful workforce system. The session includes insight from leaders in the use of sector strategies.

In integrated systems, partners work together to develop a portfolio of services using the key industry sectors identified by the State, regional or local WIB. The National Governors' Association (NGA) report, [State Sector Strategies Coming of Age: Implications for State Workforce Policymakers](#), offers a snapshot summary of sector strategies, an overview of what makes them different from traditional workforce and economic development programs, and a description of actions that State administrators and policymakers can take as part of a policy framework to support their creation and effective operation.

The [Kentucky Sector Strategy Toolkit](#) provides an example of a State-designed resource that brings together leaders, partners, and staff from stakeholder organizations to stimulate employment and reemployment efforts through the development and implementation of Sector Strategies. Understanding that good use of labor market information (LMI) is critical to building strong sector partnerships, states may want to review the recorded webinar, [Using and Communicating Data to Drive High Performing Sector Strategies](#) which explores what LMI sources are most helpful, where to access information, and how to tell a compelling story using labor data to employers and other partners. Content of this recorded session includes exploration of innovative ideas and an example of use of data to bring employers to the table.

It may be helpful as well to review [How to Strengthen Business Involvement in a Sector Initiative](#). This PowerPoint from the National Network of Sector Partners ([nnspp.org](#)) focuses on how to strengthen business involvement in a sector initiative.

States may also want to review the Small Business Toolkit, [Channeling Good Ideas into Jobs: Workforce Partnerships that Support Entrepreneurs & Small Business](#) which is designed to assist in building strong partnerships between the workforce development system and small business-serving organizations and to strengthen entrepreneurship and self-employment in a community. It gives a high-level overview of the ten basic steps in building partnerships with small business along with some examples of how this resource plays out in the field. Check out the self-assessment (pp. 13-14) to see how ready your workforce system is to convene and facilitate a Small Business Partnership.

F. Implement necessary MOUs between programs to reinforce integrated service delivery

States and local areas need memorandums of understanding (MOUs) to establish and clarify the roles and responsibilities of the various partners participating in their integrated service delivery systems. Resources and examples of MOUs for workforce partners are included in the box below.

Guidance and Resources Related to Co-Enrollment

Here is an [Example of an MOU](#) used when one-stop partners were working to integrate service delivery in a center. Also see the [Memorandum of Understanding: For the Community-Based Job Training Grant U.S. Department of Labor](#) developed by the Delaware County Community College; this resource provides a good example of a viable framework for MOUs.



Ensure **Information Technology (IT)** Infrastructure Supports Integrated Service Delivery

A. Develop integrated registration capability (IWR/WIPP/real-time LMI)

Even before the [National Vision](#) identified Integrated Workforce Customer Registration as one of the four key transformational elements in the design of an integrated service delivery system (see pp. 19-20), States have been working to implement a “common front door” registration system as they recognized entry to an integrated system begins with intake. They began working to bring separate and distinct registration processes together into a seamless single point for customers. Data collected through the Integrated Workforce Registration (IWR) system needs to be stored in one or more data management systems, properly secured in accordance with personally identifiable information guidelines, and facilitated as appropriate with the necessary memorandums of understanding or other forms of confidentiality and data sharing agreements.

ETA recognized the potential cost of building an IWR and provided some pilot states with developmental grants to test innovative approaches. Several of the resources and examples below are derived from the work of the pilot States.

You can see a recorded demonstration of the Integrated Workforce Registration system and the Customer Profile Page by clicking on this link: [Information Technology Support Center \(ITSC\): Demo of the IWR system and Customer Profile page](#). This video features work done by the States of Mississippi, New York and Oregon in conjunction with the National Association of State Workforce Agencies’ Information Technology Support Center (ITSC).

As a State moves to implement the IWR it may be prudent to review the IWR [IT Applications Technical Documentation](#). This resource includes:

- A Report to NASWA/DOL – Actual “To-Be” Use Cases, which makes a great starting point for State leaders who are interested in the original National Vision
- Integrated Registration Common Data Elements, those data elements identified by pilot States and ITSC for inclusion in the new IWR system
- IWR Profile Page Software Architecture Design Document, which defines the overall high-level architecture of IWR and WIPP system for various use cases
- The IWR System Demonstration, a PowerPoint presentation showing an early demonstration of the look and feel of the IWR system, including screen shots of the application in its design stage



- The IWR Question Administration Presentation, a PowerPoint presentation with a demonstration of the administration functionality of the IWR in terms of the user's ability to add, edit and/or delete questions from the system's functions

Finally, use this link to view a recorded webinar showcasing the work of Mississippi staff to implement the State's IWR: [Mississippi Integrated Workforce Registration \(IWR\)](#). This provides insight into what one State is doing to pull IT systems into an integrated delivery system.

B. Data storage, sharing and cross-matching

Data sharing is the framework upon which real-time triage and seamless delivery of services are absolutely dependent. If States are to implement a truly integrated system, they must examine how they gather and store data from the various workforce programs and determine how they can best connect it internally so the customer experiences a seamless continuum of information and services. The State must also map out how data will be shared among the programs comprising its delivery system. If a State is upgrading its current systems, this process includes consideration of how best to build in the hooks to be able to connect existing systems in the future.

It is possible, even probable, that States will not be in a position to completely overhaul their data management systems. In these instances, States may be able to add an Application Programming Interface, or API. This is a set of programming instructions that facilitates integration of new features into existing software. Bottom line, States must look at the individual systems and see how the data can be shared and used—and how they might best construct their framework to share data across the entire integrated system.

An integrated delivery system must also have cross-matching of data between and among programs. Since all States must share some data among programs (e.g. UI claimant data is sent to Wagner-Peyser on those claimants identified as most likely to exhaust their UI benefits under requirements of the Profiling system), all States have some experience and some established ways for cross-matching and sharing data.

States with emerging promising practices have policies and procedures that encourage or require registering all UI claimants with Wagner-Peyser, and registering them early in the claim cycle. These states work to optimize data sharing to improve quality and timing of service delivery. States with more cutting-edge practices have systems to capture the skill sets and experience of claimants and other job seekers at first contact with the system; whether the customer is filing for UI benefits or simply logging on to check for job openings, the system identifies the customer's skills and experience and begins immediately to provide information and service opportunities to meet the customer's needs.



KEY RESOURCES!

The [Integrated Intake Continuum](#) provides a vision for Integrated Intake: A coordinated, integrated approach to intake which is customer-centered, with policies, infrastructure, and training to support integrated case management and tracking by allowing information collected from customers at intake to be captured once. Subsequently, customer information collected at intake can be used to seamlessly transition customers to all needed services, or to establish eligibility for various programs. Many more resources related to integrating intake are also available in this document.

The very best systems have data exchange and processing occurring on the back-end to constantly examine detailed information about the job seeker, the latest labor market information, and the requirements of job openings from the business customer, to ensure job seekers experience a continuous, real-time flow of information and services leading to positive career advancement, and the business customer receives a referral of the most qualified job applicants. Following are some resources and examples to help States address the critical elements of data storage, sharing and usage.

The [Promising Practices: Integrating Data Systems](#) paper considers emerging promising practices in integrating data systems in Tennessee, Florida, and Ohio. It includes discussion on: sharing information across agencies and programs; tracking participants in adult learning and workforce development over time; and, using data to monitor and plan program quality and improvement.



Again, from the [Integrating Intake Resource Page](#) States can download the “[Issue Brief: Integrating Intake](#)” to find a section on Sharing Data (beginning on p.5), which includes examples from California, New York, and Utah, with discussion of single MIS systems and data warehousing arrangements.

The Power Point file available at [Utah Orientation/Assessment Eligibility Review System \(O.A.R.S.\)](#) includes an overview of the Utah O.A.R.S. tool, which provides another example of sharing data across programs and how technology is being employed to deliver services. Claimants answer a series of questions that identifies for Wagner-Peyser staff their risk of exhausting benefits. The tool also provides WIA staff with information on customers that could benefit from training assistance. When a claimant completes the online questionnaire, the O.A.R.S. system displays relevant resources, including supportive services that the claimant has indicated they need.

States are finding that efficient data sharing systems also enhance the quality of their job-matching systems. The [Utah GenLEX](#), an enhanced online labor exchange system, automatically matches job seekers and employers using an algorithm process. The system also includes business intelligence that permits employers to tailor their online job postings to their workforce needs.



States are also using data sharing to enhance the quality of their job matching systems. Early results from [Utah's RES Technology Upgrade Project](#), an RES Technology Upgrade effort, evidence potential effectiveness in several ways:

- 1/ Substantial staff timesaving** due to use of AutoCoder, which eliminates the need for staff to manually assign O*NET codes
- 2/ Improvements in the completeness,** consistency, and accuracy of O*NET code assignments to both UI claimants and job orders (primarily as a result of the AutoCoder software)
- 3/ Significantly improved access** to up-to-date (and regularly refreshed) listings of job openings, as well as expanded and more relevant labor market information tied to their occupation, through Utah's My UI Account page.
- 4/ Highlights of another State's experience** with the AutoCoder/OccuCoder tool can be seen at [AutoCoder-The Benefits of Accurate Occupational Coding](#), and,
- 5/ PowerPoint file from the Reemployment Assistance and Retraining Workshop, [Partnering to Help: Missouri's Dislocated Workers with Autocoder](#)**

Another sampling of State creativity employing cross-matched data is seen in Minnesota's unique process developed to better connect UI applicants to a complete array of reemployment services and jobs in Minnesota: [Unemployment Insurance to MinnesotaWorks.net and Workforce System Services E-mail Process](#). Under this practice, all UI applicants required to seek work are sent a series of informative and encouraging emails telling them about MinnesotaWorks.net, Workforce Center resources (e.g., workshops on resume writing, interview techniques, conducting a comprehensive "Creative Job Search", resource areas, helpful staff and computers they can use), job clubs, and other technological tools. The emails also tell the job seeker how many jobs similar to their last occupation have been posted on MinnesotaWorks.net in the last 30 days that are within 50 miles of their zip code.

Data sharing is also critical to the case management process within the delivery system. If workforce system staff are to help job seekers make informed decisions about career options, the system must provide the most current, accurate, and comprehensive data about the customer, the labor market, the services and support available, and the job opportunities. Some relevant resources include the following. In the paper [Improving Case Management and Increasing Workforce System Integration in the Trade Adjustment Assistance \(TAA\) Program](#), readers can see how California, Illinois, Iowa, Kentucky, Minnesota, Missouri, New York, Oklahoma, Pennsylvania, South Carolina, and Utah, as well as 14 local workforce investment areas within those States have shared data as they worked to improve the quality of and access to case management in the Trade Adjustment Assistance (TAA) program.

States may also gain insight by viewing materials at [Effective Case Management](#). This piece provides an Effective Case Management Resource Map which organizes and describes the results of an environmental scan of useful case management resources. This document contains a large number of hyperlinks to reports, policy documents, webinars, and toolkits.



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Conclusions

We hope you find the resources and ideas in this toolkit valuable as you enhance integration of workforce services. As states and local areas streamline and blend together their policies, service delivery and IT systems to provide all customers with optimal services, they will realize an economy of resource utilization and better customer outcomes . The more steps a State takes toward this end, the more easily full alignment can be attained – not only within the workforce system – but also with education, human services and economic development partners. The approaches and resources contained in this guide can facilitate this shift within your State or local area.

New promising practices emerge all the time and you are encouraged to network with your peers to identify solutions that fit your efforts. This guide will help you determine where to start. Best wishes in enhancing the integration of your workforce system!