**Emerging Practice**

**Title: Iowa Service Integration**

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**Source:** (please provide specific reference)

1. Research Project
2. Journal Article
3. Other Center
4. **Information Gathered from VR Programs**
5. Intensive TA Provision
6. Other

**Highlights:**

1. State level management from Iowa Vocational Rehabilitation and Workforce Agencies developed a strategy to engage staff in establishing a common service flow in Job Centers.
2. Leadership targeted four of the 15 state comprehensive workforce centers to engage in joint service process discussion with staff.
3. Learned that “integration” means different things to different people, but joint discussion facilitated by leadership from VR and Workforce jointly can generate a common service flow that makes sense for job seekers.
4. There is no data yet because the collaborative discussions have just occurred in the past year.

**Description:**

*The vision of the WIOA includes a common service process for all customers provided in an integrated service system in order to assure equal access to services and job opportunities for all customers, as well as increased economy in service provision for the service partner agencies.*

Under WIOA, partner programs and entities that are jointly responsible for workforce and economic development, educational, and other human resource programs collaborate to create a seamless customer-focused one-stop delivery system that integrates service delivery across all programs and enhances access to the programs’ services. The one-stop delivery system includes six core programs (Title I adult, dislocated worker, and youth programs; Title II adult education and literacy programs; Title III Wagner-Peyser program; and Title IV vocational rehabilitation program), as well as other required and optional partners identified in WIOA.1 (tac-15-01 RSA, page 3)

## Early in 2015 in Iowa, State VR leadership and Workforce leadership met to explore more effective ways to participate in a common customer flow that would increase opportunities to share customers, decrease “program dissonance” and improve customer service outcomes.

The first step is in development of the local service model together.

Kenda Jochimsen with the Iowa Vocational Rehabilitation Services (IVRS) and Todd Spencer with Iowa Workforce Development (IWD) began meeting in early 2015 to first discuss ideas in establishing a more integrated service flow for job center customers that have disabilities, and this discussion led to the idea of developing a pilot strategy. Together, they selected four comprehensive workforce centers as pilot offices to engage in this activity. It was approached as a “learning mission,” but Kenda and Todd both believed the discussion would lead to stronger coordination between the agencies and improved outcomes for job seekers with disabilities.

The four offices selected:

1. Burlington
2. Carroll
3. Creston
4. Sioux City

First step: On March 12, 2015, a letter and survey went out to staff in those centers whose activities were overseen by IVRS and IWD. As a result of the 2009 service integration, the IWD portion includes services established by the Wagner-Peyser Act, WIOA Title I Adult and Dislocated Worker Services, TRADE Act, TANF and Veteran services. The letter requested that respondents complete the attached survey and return it by March 25, 2015.

(letter sent to staff 3/12/15)

Terry E. Branstad, Governor

Kim Reynolds, Lt. Governor

Beth Townsend, Director

March 12, 2015

RE: IVRS and IWD pilot project

Hello to everyone in our pilot partnership regions.

We apologize for the delay in our first step of this project. We have been heavily involved with several Workforce Innovation and Opportunity Act meetings and events. That involvement has just created a greater awareness of the need for our agencies to collaborate even more at the local level as well as at the State level.

As most of you are aware, the Workforce Innovation and Opportunity Act (WIOA) pushes state agencies to align customer service strategies and performance reporting. With that in mind, your state leadership teams are asking for your help to define how we move forward toward this broad goal. This will be an ongoing process that will help us establish the most effective and efficient way to serve our common customers. Your feedback will be essential to the process and will help frame our next steps.

We recently asked you to reach out to your local partners to start thinking and discussing common customers. We have had feedback that indicates that some of you have been having those local discussions and we have been very pleased about that.

At this time, we want to ask you some questions that will help frame how we move forward toward our broad goal. Some of these questions will seem broad in nature but we ask that you answer them as specifically as possible as it applies to your local area. Our focus for the moment is on three main areas: Customer Flow, Data Sharing, and Organization/Communications Structure.

Attached with this letter is a series of questions. In order to help us identify cultural and language barriers between the agencies, we ask that you answer the questions on your own and submit the IWD responses to Todd Spencer and the IVRS responses to Kenda Jochimsen.

We are asking that you have the responses returned by March 25th. Once we have had time to review your guidance, we will start discussing next steps with this group.

Thank you again for the help and if you have questions, you should feel free to contact Todd Spencer or Kenda Jochimsen.

Sincerely,

David Mitchell, MS, CRC Lori Adams, CPM

IVRS Administrator Division Administrator, Workforce Services

(survey attached to letter)

**IVRS / IWD Pilot Project Information Search**

**Please answer the following questions to the best of your ability and in as much detail as possible. We realize this may be easier said than done, but your input is valuable as we transition into WIOA legislation.**

Customer Flow:

Please define what the customer flow is in your One-Stop.

If our goal is to create a common customer, how would you define a common customer in your area?

What are the strengths and weaknesses of your customer flow?

As a customer progresses through the customer flow, is there a case manager and, if so, who is the case manager?

What services do you currently provide to the common customer?

Do you consider customers on the IVRS “wait list” to be common customers?

Do referrals cross systems when a customer is on the IVRS wait list?

What services are available at the One-Stop that would be of value to these common customers?

Are those services being accessed by the IVRS customers to the maximum extent? Please explain why or why not.

Are there IVRS customers who are not able to complete the data entry steps associated with the One-Stop welcoming process? If so, how do you know? Please describe the circumstances that would create this situation.

Data Sharing:

If our goal is to have common customers and common customer service processes, what types of data or data elements would need shared across our current intake and case management systems? Please be as specific as possible.

If we were able to move to common case management information, how often do you think data would need to be updated between current systems? Why not more or less?

What things would prohibit you from sharing information with the One-Stop partners?

Organization and Communications:

How do you share resources within the One-Stop?

How are your resources aligned to reduce duplication of services between programs?

What detracts from creating a trusting relationship between the two organizations?

What are situations where it is easy to work well with the partner organization?

What needs to happen at the State level to help you create better local partnerships?

Second step: Kenda and Todd compiled the survey responses and discussed them together. They developed their strategy for the third step.

Third step: Kenda and Todd visited the offices together and met with the staff of services overseen by IVRS and IWD. The purpose was to engage in open discussion on service process, respond to questions or suggestions generated by the survey, and address need for clarification of guidance that was suggested in some of the responses. Kenda and Todd left each of the four offices with the following tasks:

1. Define the referral process.
2. Develop a picture of an office service process that reflects what everyone does.
3. Go through the data that comes through the initial intake screens that would be good for sharing across all center partner agencies (data sharing discussion).

*With regard to the shared discussion, we talked locally about how to achieve common measures. Our guidance to them was to not wait for the state, to look now at their own processes for sharing customers and referral. Eventually, there will be stronger guidance from the state, but (with regard to service delivery), it is best to focus locally. We went past application and referral to discuss what application looks like. There is not a common vision or idea of what “integration” looks like where VR is involved. It is not the same thing that occurred in 2009 among the services that IWD fully or partially oversees. There are other language things that needed to be addressed together -- even with regard to areas where we use the same words.*

*When we asked, “What can we at the state do to support you,” the initial response was that they were dubious of our sincerity. After our second visit, they recognized our support to local teams to establish change.*

Fourth step: *(Note: Has not yet occurred.)* Return visits by Kenda and Todd to check the progress of the tasks. They would like to follow up on the local discussions in response to the clarifications that were provided during the earlier clarifications, and see what additional language issues might be coming up.

Key Notes at this point:

1. “The big thing is that we (Kenda and Todd) work through this together before communication goes out.”
2. Kenda and Todd went out together and held discussion with all staff together. “What can the state do differently to support you together in strengthening service delivery?”
3. We need to be thinking how to include Adult Education in this discussion also.
4. Even though Federal Guidance of vision is the same, Local Vision for WIOA is different within different agencies – needs to be addressed together between agencies.
5. So much of communication is based on how we work (or don’t work) together.
6. Goal is to have everyone see our customer service as a process or system -- not as programs.
7. Learned that some VR offices tell their partners that they want every job seeker with a disability referred to them. This is not the expectation at the state. Not every job seeker with a disability coming the door is looking for intensive case management services.

**Evaluation and Potential Impact:**

The steps taken in Iowa in this practice can be considered a work in process, but is already significant in two ways:

1. Consideration is made here between all parties with regard to a “Job Center” customer experience for job seekers with disabilities as opposed to the separate “program” experiences for a workforce customer or a VR customer.
2. Leadership of the workforce and VR agencies developed the strategy together and visited Job Centers together and implemented the strategy together.

With the changes that come with WIOA implementation, this might be an effective practice for state leadership to use with local offices to build their models of customer service flow in a job center consistent with guidance in WIOA. The shared TA approach taken by leadership in this example of an effective means to correct misinterpretations in guidance if it is delivered only as policy in written format, as well as differences in interpretation that will naturally occur between different agencies through the shared discussion led by agency leadership collaboratively.

The suggestion here by Iowa leadership to expand this discussion to other partners can be a strong step to make the Region’s Career Pathway Model a shared approach of all partner agencies to meet the needs of the locally identified business sector boards.

**For more information, contact:**

Kenda Jochimsen

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