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OKLAHOMA EMPLOYMENT AND TRAINING ISSUANCE # 03-2007

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FROM: Richard J. Gilbertson, Director
Workforce Integrated Programs Division

TO: Chief Local Elected Officials
LWIB Chairs
LWIB Staff
Local Office Managers

SUBJECT: Local Workforce Integration Policy

PURPOSE: Guidance for the development of local Workforce Integration Policy including the state minimums that must be included in the policy.

BACKGROUND: In July 2005 the Oklahoma Employment Security Commission (OESC) implemented a comprehensive reorganization of its state-level staff to move from a focus on the operation of silo programs to a focus on quality integrated service delivery. Wagner-Peyser (WP) and Workforce Investment Act (WIA) Title I Adult programs were no longer separate divisions, but were integrated into functional units.

The goals of this reorganization were to:

- Improve access to quality services through service and program integration
- Support the linkages between workforce programs and economic development by developing shared goals and emphases
- Implement the intent of the Governor's Council and the State Strategic Plan for comprehensive workforce system integration
- Provide a framework to empower and support the Workforce Investment Board's (LWIB) integration of Wagner-Peyser and WIA Title I Adult program operations at the local level

- Reduce duplication and seek efficiencies in a time of limited resources

This state-level reorganization was viewed as the first phase of a broader, more comprehensive integration of Wagner-Peyser and WIA Adult and Dislocated Worker programs. While integration with all workforce system partners remains a goal, it was important to give immediate attention to the integration of the two major program partners under OESC's umbrella which, in most cases, continues to act as the backbone of Workforce Center operations.

In addition to this state-level reorganization, there were a number of other initiatives supporting Wagner-Peyser and WIA Adult Programs' integrated service delivery:

- The Governor's Council adopted a goal to "create an accessible system of integrated service delivery" in the State's Two-Year Strategic Plan
- LWIB Certification required "quality workforce system integration" to be achieved
- Local Strategic Plans were required to evaluate the one-stop system and enhance service integration and develop an integrated service delivery strategy
- Local Two-Year Plans required LWIBs to show their priority with integrating the Wagner-Peyser Program and the Workforce Investment Act Title I Adult programs and meet established service integration benchmarks

In November and December of 2005, LWIB Directors, Workforce Center Managers, WIA Directors, Employment Service (ES) Area Managers, private sector LWIB members, and Chief Local Elected Officials (CLEO) were all invited to sessions designed to assist local integration efforts. Greg Newton, a nationally recognized consultant, assisted OESC in ensuring a common understanding of the definition and expectations of "service integration," shared the benchmarks to be used to determine the degree to which local areas have achieved WIA/WP integration, provided an overview of what other States, LWIBs and Workforce Center Managers were doing, shared a customer flow model for consideration, and sought input into steps OESC should take to promote service integration at the local level.

Based on the input from these audiences, OESC made a number of changes, including:

- Ensuring Oklahoma Service Link will assist the integration process by allowing service delivery to be as paper free as possible
- Permitting OESC local center staff to be functionally supervised by WIA staff under certain, appropriate conditions

Then in March 2006, OESC presented a one day session to LWIB members and staff, describing the State's shift to a skill-based service delivery system, defining service integration, offering ideas to bring about integration, and clarifying the LWIB's leadership roles and responsibilities in this initiative.

Oklahoma Employment and Training Issuance (OETI) 04-2006, State Common Measures Policy was issued May 30, 2006. This policy provided revised guidance for common measures based on the Training and Guidance Letter (TEGL) No. 17-05, “Common Measures Policy for the Employment and Administration’s Performance Accountability System and Related Performance Issue” by the United States Department of Labor, Employment and Training Administration. OETI 04-2006 furnished guidance to minimize the different reporting and performance requirements, facilitated the integration of service delivery, and reduced barriers to cooperation between programs.

Responding to local input, in June 2006 OESC explained the rationale, motivation, and expectations with redesigning Oklahoma’s workforce system to be demand driven, skills-based, and integrated. Several hundred front line staff from across the state attended these sessions and responded positively to the challenges.

In July 2006, OESC issued OETI 06-2006, Program Eligibility and Data Element Validation Policy for Workforce Investment Act Adult Dislocated Worker programs, Wagner-Peyser, and Trade Adjustment Assistance programs. This OETI provided eligibility and associated data element validation procedures that minimized the effect of program silos and the burden of validation documentation on staff and customers. It created a common customer pool for customers receiving staff assisted services. Equally important, this OETI directed that Oklahoma Service Link and local staff validation be used to comply with eligibility documentation and data validation. This allows most eligibility and validation documentation to be maintained electronically in OSL and replaces the need to keep paper records or original source documentation for performance participants receiving only core and intensive services.

Over the next several months, OESC continued to share with LWIBs, LWIB staff, Workforce Center Managers, and functional unit staff, techniques and processes to overcome the challenges of creating a demand driven, skills-based, integrated service delivery system. The training also discussed the purposes, outcomes, and process steps of each of the three functional units anticipated in the single customer flow model, generated ideas for developing local procedures and protocols, and captured peer learning for best practices.

MESSAGE: While there are now a number of fully integrated, skills-based Workforce Centers, many Centers remain challenged, finding it difficult to move forward with integration. In addition, some Centers are unclear about whether the Greg Newton sessions established State policy, whether LWIBs are responsible for local integration policy, whether their LWIB has established any local policy, or whether they are just lost. As a result, we have been asked to provide more clarity, if possible, about State expectations.

The Workforce Investment Act, in section 117, establishes that local boards are responsible for the one-stop delivery, or workforce, system in their local area. Integrated service delivery is merely one aspect of this local workforce system. So the responsibility for demand driven, skills-based, integrated service delivery clearly belongs to the LWIBs. However, in order to establish some consistency among workforce investment areas, the State has an interest in establishing minimum standards for this initiative. What follows are those minimum standards.

Each LWIB will designate at least one comprehensive center with integrated WIA Adult, WIA Dislocated worker, and Wagner-Peyser programs. Before making this designation the LWIB needs to consider virtual services opportunities; anticipated future ES and WIA funding levels; ensuring adequate WIA and ES staff in designated centers; and procuring not just WIA services, but integrated services where WIA staff may be functionally supervised by others.

Each LWIB will also designate a Center Manager for each comprehensive, integrated center.

Each comprehensive, integrated Center Manager must be authorized to organize staff by function, designate functional unit supervisors, and establish the purpose of each functional unit unless the LWIB has otherwise made these decisions.

Each comprehensive, integrated Center will utilize a single customer flow model based on customer need, not program requirements.

All customers will receive prompt service with no future scheduling of appointments for initial welcoming functions.

Oklahoma Service Link will be used to gather non-repetitive data in real time in each appropriate functional unit.

Every customer's computer comfort level must be ascertained with some plan to accommodate their lack of comfort via tutorials or pencil and paper assessments.

Every new customer will receive an initial skills assessment in the welcoming unit as a required staff assisted service.

Every new customer will receive career counseling which results in a Basic Employment Plan which is based on their interests, initial assessment, and labor market demand as a required staff assisted service.

Every Skills Unit customer must be offered remediation for any deficiencies identified in their initial assessment.

Every LWIB will monitor based on its local policies which must include these minimum standards.

Action Required: LWIBs must review and use this guidance to develop board policy for integration in their Local Workforce Investment Area.

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