WSW BOARD OF DIRECTORS MEETING
Wednesday, June 8, 2022
4:00 pm to 6:00 pm
Workforce Southwest Washington – Mt. Rainier Room

4:00 pm Welcome, introduction of members, guests, and staff

4:05 pm Consent Agenda
• Minutes, Contract, Policy Memos *
  Paige Spratt

4:10 pm CEO Report
  Miriam Halliday

4:25 pm Public Comment
  Paige Spratt

4:30 pm Transition

4:45 pm Quality Jobs CWWC Board of Director Workshop
  Miriam Halliday

6:00 pm Adjourn
  Paige Spratt

WSW Board Meetings 2022
• December 13, 2022 – TBD

* - Action Required
WSW Board Meeting Minutes  
June 8, 2022  
4:00 p.m.  
Zoom Conference Call

Board Members Present: Chris Bailey, Mike Bridges, Bob Carroll, Renny Christopher, Ralph Clark, Monte Constable, Tracy Doriot, Lekha Fernandes, Bob Gustais, Ilona Kerby, Diane McWithey, A.D. Simmons, Ted Sprague, Paige Spratt, Shannon Stull, Lee Tischer, and John Vanderkin.

Board Members with Excused Absences: Jen Baker, Karin Edwards, Mara Kieval, and Eddie Martin.

Guests Present: Nathan Webster, Adrienne Watson, Lee Osipchak, Michelle McClanahan, Chuck Hendrickson, Nicole Ganier, Suba Jagannathan, Tim McGann, Tennille Johnson, Angela Burckhard, Corey Giles, James Hughes, Anthony Terlizzi, Mark Tishenko, Mike Nieto, Stacey Smith, Clover Spears, and Cheryl Hamilton.


Welcome, Introduction of Members, Guests, and Staff  
Chair Paige Spratt opened the meeting at 4:03 p.m. and welcomed everyone in attendance. Members, guests, and staff introduced themselves in the chat box.

CONSENT AGENDA  
Chair Spratt entertained a motion to approve the Consent Agenda, consisting of the minutes from the Council meeting held on March 9, 2022, Contract Memo, Policy Memo; which included WSW LLSIL Policy #3018, Launchpad User Guidelines Policy #2009 Rev 1, and WIOA Title I-B Performance Sanctions State Policy #5415 Rev 1; WorkSource & NEXT Site Certifications, Workforce System MOU Modification, and the Quality Jobs Proclamation.

Ted Sprague moved to approve the Consent Agenda as presented, second by Ralph Clark. Motion carried.

FISCAL REPORT & PY22 BUDGET  
Treasurer Renny Christopher recapped the key essentials of the Treasurers Memo. CFO Barri Horner went over the proposed PY22 budget in detail, including all direct and indirect costs.

Following the presentation, questions were invited and addressed by Treasurer Renny Christopher and CFO Barri Horner. A motion was entertained to adopt the PY22 budget as presented, with the caveat that any subsequent changes along with the expected mid-year budget revision will be brought before the Council for a vote before implementation.
Mike Bridges moved to approve the PY22 Budget as presented, second by Shannon Stull. Motion carried.

**WSW GOVERNANCE**

**Board Member Elections:** Governance Co-Chair’s Ralph Clark and A.D. Simmons gave introductions of Stacey Smith, ControlTek; Nathan Webster, NDUJ Brand; Mark Tishenko, Edge Networks; Jasmine Tolbert, YWCA; Mike Nieto, Catworks Construction; Mandy Kipfer, DVR; Corey Giles, NORPAC; Suba Jagannathan, Mirus Toys; Adrienne Watson, PeaceHealth; and Angela Edginton-Burkhard, Kyocera, sharing with the full board unique qualities that the Governance Board thought each perspective board member would bring to the WSW board. A motion was entertained to approve all ten for Council terms beginning on July 1, 2022 through June 30, 2025.

John Vanderkin moved to accept the nominations of Stacey Smith, Nathan Webster, Mark Tishenko, Jasmine Tolbert, Mike Nieto, Mandy Kipfer, Corey Giles, Suba Jagannathan, Adrienne Watson, and Angela Edginton-Burkhard to serve on the WSW Board of Directors as presented, second by A.D. Simmons. Motion carried.

**Term Extension Elections:**
A motion was entertained to approve the renewal of three-year Council member terms for Ted Sprague, CEDC; Bob Gustainis, Walgreens; Shannon Stull, LiUNA 335; Mike Bridges, IBEW #48; Chris Bailey, Lower Columbia College; and Renny Christopher, WSVU. Upon approval of the nominations, these board members will serve from July 1, 2022 through June 30, 2025.

Bob Gustainis moved to approve the renewal of Ted Sprague, Bob Gustainis, Shannon Stull, Mike Bridges, Chris Bailey, and Renny Christopher to serve on the WSW Board of Directors as presented, second by Lekha Fernandes. Motion carried.

**Term Completions:**
A.D. Simmons shared that Eddie Martin, Darcy Altizer, and Diane McWithey have completed their terms as WSW Board of Directors.

**Board Chair Renewal:**
A motion was entertained to approve Paige Spratt’s renewal as the Board Chair for her second and final term as Board of Director Chair. Upon approval, Paige Spratt will serve as Board Chair from July 1, 2022 to June 30, 2024.

A.D. Simmons moved to approve the renewal of Paige Spratt to serve on the WSW Board of Directors as Board Chair as presented, second by Renny Christopher. Motion carried.

WSW’s Executive and Governance Committee will be kicking off a new Board Sponsorship program in July 2022. Each new WSW Board of Director member will be matched with an existing WSW Board of Director member for the first year of membership.

**WSW ECONOMIC MOBILITY**
Board member Shannon Stull shared the economic mobility grant report out to the full board to provide a status snapshot of WSW’s major investments. Shannon Stull highlighted some of the successes for Thrive (Economic Security for All ECSA) continues to see growth and investment. Round 1 concluded April 30,
2022 and WIOA Round 2 funding started April 1, 2022 – March 31, 2024. Quarter over Quarter enrollment continues to see steady gains: Quarter 11 gain of 34 is highest yet. WSW anticipates round 3 investments of state funds into ECSA which represents a positive step for continued federal and state investment in the program. The challenges are the performance numbers appear to be climbing out of a long period of slow performance, many contracts are still behind performance in spending but are trending upwards. WSW subcontractors continue to see high staff turnover. Also shared was that WSW recently executed a fourth System Liaison contract with Clark College.

CEO REPORT
Adult & Dislocated Worker RFP Approval:
Benton Waterous, Director of Programs went over the timeline of the Adult & Dislocated Worker RFP, the selection process of the Scoring Committee, and the scoring rubric and the criteria that the committee scored each proposal. The criteria for the scoring rubric were the following: demonstrated experience and ability, relationships and collaboration, and program design. The five open RFP’s under the WIOA Adult & Dislocated Worker grant were the following: Housing Clark County, Housing Cowlitz + Wahkiakum Counties, Re-entry Clark County, Re-entry Cowlitz + Wahkiakum Counties, and WorkSource Clark, Cowlitz, and Wahkiakum Counties.

Based on proposals, presentations, and discussion at the Scoring Committee’s convening meeting, a motion was entertained to invest in Career Team, LLC for the WorkSource contract; Educational Opportunities for Children and Families as a small subset of the WorkSource contract; Love Overwhelming Services for Re-entry populations in Cowlitz + Wahkiakum counties; recommends to retain the Housing Cowlitz + Wahkiakum counties funds so that WSW may sole source the procurement due to bidder unable to provide a satisfactory program design, staffing model, or connection to employment services; retain the Housing – Clark County funds so that WSW may sole source the procurement due to no bidders submitted proposals; retain the Re-entry – Clark County funds so that WSW may sole source the procurement due to no bidders submitted proposals.

Questions were answered and addressed by Miriam Halliday and Benton Waterous.

John Vanderkin moved to approve the Adult & Dislocated Worker funding for the WorkSource contract serving Clark, Cowlitz, and Wahkiakum Counties to Career Team, LLC as presented, second by Shannon Stull. Motion carried.

Ralph Clark moved to approve the Adult & Dislocated Worker funding for the WorkSource contract serving Clark, Cowlitz, and Wahkiakum Counties to Educational Opportunities for Children and Families as presented, second by Bob Gustainis. Motion carried.

Renny Christopher moved to approve the Adult & Dislocated Worker funding for Re-entry in Cowlitz & Wahkiakum Counties Contract to Love Overwhelming Services as presented, second by Lekha Fernandes. Motion carried.

CEO Miriam Halliday updated the full board that the September 14th board meeting will be an in-person Quality Jobs workshop with the first 30 minutes dedicated to board business. The workshop will also be attended by the board of directors from WorkSystems Inc. and Clackamas Workforce Partnership. Questions were addressed and answered by CEO Halliday.
BYLAW REVISIONS
Chair Paige Spratt touched on the process and high-level changes that were listed in the Bylaw Subcommittee Executive Summary memo. The revised Bylaws with changes were presented to the Full board. Questions were answered by Chair Spratt and Miriam Halliday. A motion was entertained to approve the revised bylaws.

Ilona Kerby moved to approve the revised bylaws to be presented to the June 8th board meeting for final approval, second by Renny Christopher. Motion carried.

PUBLIC AND BOARD COMMENT
Public and Board comments were invited but none were forthcoming.

ADJOURNMENT
With nothing further for the good of the order, Chair Spratt entertained a motion to adjourn the meeting at 5:22 p.m.

John Vanderkin moved to adjourn the meeting at 5:22 p.m.
CONTRACT MEMO

DATE: SEPTEMBER 7, 2022
TO: MIRIAM HALLIDAY, CEO
WSW BOARD OF DIRECTORS
FROM: LINDA CZECH, WSW CONTRACTS MANAGER
RE: CONTRACT/GRANT UPDATES (JUNE - AUGUST)

WSW modified the following contracts:

- Extended the date for Equus Workforce Solutions’ Disaster Relief Employment contract on July 5, 2022 to March 31, 2023 and increased budget by $8,000 for total amount of $370,718.82.
- Extended the end date for Equus Workforce Solutions’ Disaster Relief Employment Recovery contract on June 28, 2022 to February 28, 2023. No change to budget total.
- Extended the end date for Equus Workforce Solutions’ CDGB-CV COVID Hunger Relief contract on July 12, 2022 to June 30, 2023 and decreased budget by $187,965 for total amount of $573,224.
- Extended the end date for Equus Workforce Solutions’ Incumbent Worker Training contract on July 12, 2022 to June 30, 2023. No budget changes.
- Extended On Line Support IT Service agreement for 12 months to June 30, 2023.

WSW executed the following contracts:

- Webfor for $8,640 to provide web site hosting and maintenance on WSW and Next websites for a two-year period, ending June 30, 2024.
- PointNorth Consulting for $11,250 to provide Next with storytelling and strategic content development, ending November 1, 2022.
- Lower Columbia College for $78,000, to provide a connection between the public workforce system and the region’s Community College system, one year ending June 30, 2023.
- Cowlitz Economic Development Council for $25,000, to support and promote employers in Cowlitz County to improve job quality, one year ending June 30, 2023.
- Washington State University Vancouver for $125,000 to provide connection between the public Workforce system and the regions Public University system, one year ending June 30, 2023.
- Wahkiakum Health and Human Services for $90,268.94 to provide personnel funding for Wahkiakum County community outreach, one year ending June 30, 2023.
- Lightcast for $25,000 to assess the impacts of WSW’s WIOA programs during a chosen calendar year on the local economy.

- Equus Workforce Solutions Executed Contracts:
  - $175,803 Federal funded Economic Security for all to recruit, retain, and provide follow up for economically marginalized individuals residing in Cowlitz and Wahkiakum, one year ending June 30, 2023.
  - Equus Workforce Solutions for $40,000 Fourth Plain Navigator for a part-time Fourth Plain Navigator position to deepen community connections between the public workforce system and the Fourth Plain Community, six months ending December 31, 2022.
Equus Workforce Solutions $837,580 for Title 1 Youth Clark County and $170,010 for Title 1 Youth Cowlitz & Wahkiakum Counties support Opportunity Youth to be prepared for post-secondary and career success, one year ending June 30, 2023.

Equus Workforce Solutions for $424,648 Career NDWG to providing subsidized childcare services to the workforce to those most disproportionately affected by COVID-19 job loss, one year ending June 30, 2023.

Equus Workforce Solutions $390,434.90 State funded Economic Security for all to recruit, retain, and provide follow up for economically marginalized individuals residing in Cowlitz and Wahkiakum, one year ending June 30, 2023.

Equus Workforce Solutions $300,000 Southwest Washington’s largest youth summer internship investment ending December 31, 2023.

WSW notification of grant award/execution:

- WSW received executed grant award for Economic Security for All-Round 3 (State Funding) through Employment Security Department for July 1, 2022 to June 30, 2023. Grant award amount is $557,764.
- WSW received executed grant award for Career National Dislocated Worker through Worksystems Inc. for July 1, 2022 to June 30, 2023. Grant award amount is $490,440.
- WSW received executed grant award for PY22 Education, Employment and Training renewal from Clark County Juvenile Justice for $25,000.
- WSW received executed grant award for PY22/FY23 WIOA Title I allocation:
  - Dislocated Worker - $1,081,471
  - Admin Cost Pool - $379,957
  - Youth - $1,185,939
  - Adult - $1,152,203

Board Approval Needed

- PY22 Title I contracts beginning October 1, 2022, all contracts to provide services to Adult and Dislocated Workers as part of year 1 of the 3-year Adult and Dislocated Worker procurement cycle.
  - Career TEAM –
    Clark County $680,485
    Cowlitz & Wahkiakum Counties $189,515
    Total Contract $870,000
  - Educational Opportunities for Children and Families –
    Clark $62,057
    Cowlitz & Wahkiakum Counties $17,283
    Total Contract $79,340
  - Love Overwhelming – Cowlitz & Wahkiakum $120,000

WSW developed and implemented a new community network-based investment strategy that would award smaller amount grants to more but smaller community-based organizations. The new strategy focused on increasing accessibility, expanding access, and diversifying bidders who would submit proposals that would reflect the service populations but who may not already be familiar with, or a part of, the public workforce development system.

- Equus Workforce Solutions – One Stop Operator Clark $125,147
  – One Stop Operator Cowlitz $34,853
  Total One Stop Operator Total Contract $160,000
POLICY MEMO

DATE: SEPTEMBER 8, 2022
TO: MIRIAM HALLIDAY
WSW BOARD OF DIRECTORS
FROM: TRACI WILLIAMS, WSW OFFICE MANAGER/EXECUTIVE ADMINISTRATOR
RE: POLICY UPDATES

Memorandum of Understanding State Policy 1013-4

This is a revision to the original policy that reflects further clarification from U.S. Department of Labor regarding required and additional partners in the one-stop. Additionally, this revision outlines certain specific components to the local MOU amendment process, signatories to the MOU and any subsequent revisions, and when fully signed modifications are required. Revised State Policy 1013-4 is posted for your reference.

Based on the approval process, this policy approval falls under Tier 1 Executive Committee and Full Board notification.

Tier 1 – Minimum

Definition: Minimum revisions consist of grammar, spelling, branding changes, State or Federal mandated adjustments, or a new State or Federal mandated policy with no local revisions. These revisions would not require Executive or Full Board approval but would be included in a notification memo.

Record Retention and Public Access 2002-2

This was a revision to our Record Retention and Public Access Policy. Employment Security Department revised the state policy which updates the participant file retention schedule to align with guidelines issued by the Secretary of State that apply to ESD and all federally funded programs that it administers.

Based on the approval process, this policy approval falls under Tier 1 Executive Committee and Full Board notification.

Tier 1 – Minimum

Definition: Minimum revisions consist of grammar, spelling, branding changes, State or Federal mandated adjustments, or a new State or Federal mandated policy with no local revisions. These revisions would not require Executive or Full Board approval but would be included in a notification memo.
Complaint Resolution, Equal Opportunity, and Nondiscrimination Policy 2004-3

This was a revision to our Complaint Resolution, Equal Opportunity, and Nondiscrimination Policy. In this revision, a section was added to allow for informal, anonymous reporting for all types of concern. Concerns were raised from WorkSource regarding customer behavior and the safety and well-being of the staff. Therefore, the team revised and posted the WorkSource Code of Conduct flyer and added to the policy.

Based on the approval process, this policy approval falls under Tier 3 requires Executive Committee approval. Executive Committee approved on August 24th. Also, requires the Full Board approval.

Tier 3 – Substantial

Definition: Substantial revisions consist of significant revisions to a current policy or a State or Federal mandated “new” policy with local revisions made that will affect service delivery. These revisions require approval from both Executive Committee and Full Board.

WIOA Infrastructure Agreement State Policy 1024-2

This is a revision to the original policy that further defines required and additional partners who must sign the IFA and contribute to the operation and infrastructure costs of one-stops, reconciliation of infrastructures costs, and when changes to the IFA require a fully signed amended IFA and MOU. With this revision, WSW can adopt and implement State Policy 1024-2. Revised State Policy 1024-2 is posted for your reference.

Based on the approval process, this policy approval falls under Tier 1 Executive Committee and Full Board notification.

Tier 1 – Minimum

Definition: Minimum revisions consist of grammar, spelling, branding changes, State or Federal mandated adjustments, or a new State or Federal mandated policy with no local revisions. These revisions would not require Executive or Full Board approval but would be included in a notification memo.

WSW Integrated Service Delivery Policy 4010 and Integrated Service Delivery Handbook

When WSW started Integrated Service Delivery (ISD) we adopted the state handbook and policy for implementation. Over the last few years, it became apparent that local guidelines and direction were needed. This policy and handbook sets the standard for local delivery of ISD with co-enrollment through WorkSource. Also, requires the delivery of WorkSource services in a manner that aligns the resources of participating partners to seamlessly address the training and employment needs of job seekers and business customers.

Based on the approval process, this policy approval falls under Tier 3 requires Executive Committee approval. Executive Committee approved on August 24th. Also, requires the Full Board approval.

Tier 3 - Substantial

Definition: Substantial revisions consist of significant revisions to a current policy or a State or Federal mandated “new” policy with local revisions made that will affect service delivery. These revisions require approval from both Executive Committee and Full Board.
Record Retention and Public Access

Policy: #2002 Revision 12

Date of Original Policy: March 1, 2009
Effective Revision Date: May 25, 2016, August 28, 2022

Background:

Workforce Innovation and Opportunity Act (WIOA) Title 1-B, Washington State Policy #5403 Rev 1 requires Local Workforce Development Boards to maintain and retain records of all fiscal and program activities funded under the 2014 Act. Grantees, Subrecipients, subrecipients, and subcontractors funded under WIOA must abide by WIOA law, regulations, guidance, all applicable Office of Management and Budget (OMB) Circulars, state regulations in laws and rules (Revised Code of Washington and Washington Administrative Code), Office of Financial (OFM) policies, and state WIOA policies. If funding is not WIOA, subrecipient and/or subcontractor must follow record retention rules outlined in grant or funding agency.

Policy:

This policy sets forth the following minimum timeframe requirements for records retention, and the extent to which such records may be made available to the public. Subrecipients/subcontractors must keep records that are sufficient to permit the preparation of reports required by the Secretary of Labor and the tracing of funds to a level of expenditure adequate to ensure that the funds were spent lawfully.

1. Record Retention

   a. Retain all records pertinent to the grant, grant agreements, interagency agreements, contracts or any other award, including financial, statistical, property, applicant or registrant records, and supporting documentation, for a period of at least three (3) years after submittal of the final expenditure report (closeout) for that funding period to WSW.

   b. Retain all records of non-expendable property for a period of at least three (3) years after final disposition of property.

   c. Retain all program enrollment/eligibility and data validation records pertinent to program applicants, program registrants, eligible program applicants/registrants, program participants, ineligible program applicants, wait listed program applicants, WSW or service provider employees, and applicants for employment for a period of not less than three-six (3:6) years after the end of the fiscal year from the point that the record is no longer included in reportable outcomes.

   d. Retain records regarding complaints and actions taken on the complaints for a period of not less than 3 years from the date of resolution of the complaint.

   e. After the files have been retained for the appropriate period cited in Section 1.a-d, three (3) years, refer to your organization’s guidelines for destroying confidential information.
f. Retain all records beyond the required three-six (36) years if any litigation or audit is under way begun or a claim is instituted involving the grant or agreement covered by the records. The records shall must be retained for at least six an additional three (36) years after the litigation, audit, or claim has been resolved.

In the event of the termination of the relationship between the State and WSW or other WIOA and a subrecipient, the WSW or subrecipient is responsible for maintaining and retaining their own records as well as the records of any subcontractors. If the subrecipient is unable to retain records, the following records will be transferred to WSW: all program related records, including contract related personnel records, reports, applicant and participant files, documentation and physical evidence, in addition to documents required by the contract. The State, however, is responsible for maintaining and retaining the records of WSW or subrecipient is unable to maintain and retain its own records or those of its subrecipients.

Copies of records made by microfilming, photocopying, or similar methods may be substituted for original records if they are preserved with integrity and are admissible as evidence.

All records retained beyond the mandatory retention period are subject to audit and/or review.

2. Limitation of Public Access to Records

Personal records of program registrants (including WIOA) will be private and confidential, and will not be disclosed to the public. Personal information may be made available to WorkSource partners or service providers on a selective basis consistent with the registrant’s signed “Authorization for Release of Requested Information” form. In addition, this information may be made available to persons or entities having responsibilities under WIOA including representatives of:

a. The U.S. Department of Labor
b. The Governor
c. WIOA Grant Recipients and Public Agencies
d. Local Area Subrecipients

The conditions under which information may be released or withheld are shown below:

a. WIOA registrants will have access to all information concerning themselves as individuals unless the records or information are exempted from disclosure.

b. The names of WSW staff and subrecipient staff in positions funded by WIOA, in part or in whole, will be a matter of public record. Other information pertaining to these recipients or subrecipient employees will be made available to the public in the same manner and to the same extent as such information is made available regarding staff in positions not funded by WIOA.

References:

- Public Law 113-128, Workforce Innovation and Opportunity Act of 2014, Section 185(a)
- 2 CFR 200.333-337
- Federal Register Vol 65 No 127 Rules and Regulations, Disclosure of Records under the Freedom of Information Act
29 CFR 37.37
29 CFR 97.42
RCW 42.17.020(1)
RCW 42.56
RCW 40.14
Telford v. Thurston County Board of Commissioners
ESD Policy Record Retention 5403 Rev 1

Supersedes:


Website:

http://workforcesw.org/providers#policies
Workforce Southwest Washington
Policies and Procedures

COMPLAINT RESOLUTION, EQUAL OPPORTUNITY, and NONDISCRIMINATION

POLICY #: 2004 Revision 32

Original Policy Date: 8/28/2013
Effective Revision Date: 4/28/2021

Purpose:
To provide one policy with links to each relevant systemwide policies for resolution depending on type of complaint. Also provide equal opportunity (EO) and nondiscrimination principles and the enforcement of those principles in the administration and operation of the programs and activities under its oversight.

Background:
Federal law and regulations require procedures for handling complaints alleging violation of WIOA Title 1, Wagner-Peyser, and Trade Adjustment Assistance (TAA) laws. All recipients under WIOA Title I are responsible for ensuring EO and nondiscrimination in programs and activities funded in whole or in part under WIOA.

Policy:
A. Customer Concern and Complaint Resolution Policy 1012 Revision 2

WSW’s priority is the health and safety of the staff and customers. System customers must abide by the Code of Conduct posted in the Center(s) or risk being banned from the Center(s) in accordance with WSW policy. Staff must abide by employee code of conduct or their personnel handbook. Any inappropriate behavior witnessed by staff must be immediately reported to the Complaint Coordinator or done so anonymously by completing this online form.

WSW and system partners will follow this procedure for handling program complaints, issues, or concerns:

- The WSW service area also has an anonymous option to file an issue or concern. Customers or employees may click here for that option. Any customer who witnesses inappropriate conduct may report it anonymously, verbally, or in writing. Verbal or in writing may be sent to the Complaint Coordinator or Local EO Officer. The submitted online form is sent to the Complaint Coordinator for processing.

- WSW appoints one WorkSource Complaint Coordinator (the One-Stop Operator) and one Youth System Complaint Coordinator (Next Director) who is responsible for the oversight of the complaint throughout the process. The Complaint Coordinator will lead the complaint procedure and will consult program supervisors as necessary for each program and/or office.

Commented [AG1]: Added this section to allow for informal anonymous reporting for all types of concerns. Also, included the Code of Conduct for WorkSource.
• The Complaint Coordinator will act as the first point of contact to the complainant and is responsible for logging, tracking, and overall oversight of all local complaints.

• It is the expectation of WSW that the Complaint Coordinator and program supervisors (if necessary) shall collaborate when complainants present allegations involving multiple system partners. The collaboration will also include the other Complaint Coordinator and Local Equal Opportunity Officer, if necessary.

• WSW requires that all WorkSource or Next partners provide an assurance that the Complaint Coordinator will be informed of all local complaints concerning WorkSource Centers, Affiliate Sites, Connection Sites or Next Centers, from point of entry to resolution.

• All WorkSource and Next partners will make an effort to informally resolve customer complaints, issues or concerns at the lowest level possible while still achieving satisfactory resolution for the complainant.

• All WorkSource and Next system partners are required to follow the minimum complaint processing requirements contained in the WorkSource Program Complaint Handbook for WIOA Title 1, Wagner-Peyser, and TAA.

• The Local Equal Opportunity Officer is responsible for logging, tracking, and processing local discrimination complaints.

• Program complaint logs must be made available to the Local EO Officer and State EO Officer when asked. The log must be stored in a secure location with limited access and contain name of complainant, contact information, name of staff handling, description of the complaint, date of complaint, program complaint is alleged, outcome/resolution, and date of resolution. This log will be reviewed annually during monitoring.

• Follow State Policy 1012 Revision 2 for additional guidance and procedures.

B. WorkSource System Discrimination Complaint Processing Policy 1017

In its oversight capacity for discrimination complaints, WSW and system partners will follow this procedure:

• The Local Equal Opportunity Officer is responsible for logging, tracking, and processing local discrimination complaints.

• Complaints will be processed using the requirements outlined in the WorkSource System Discrimination ComplaintProcessing Handbook.

• Discrimination complaint log must be made available to the WSW CEO and State EO Officer when asked. The log must be stored in a secure location with limited access and contain name and contact information of complainant, description of the complaint, prohibited factor basis, date of complaint, date of response, date sent to state, outcome/resolution, and date of resolution.

• Follow State Policy 1017 for additional guidance and procedures.

C. Equal Opportunity and Nondiscrimination Policy 5402 Revision 3

• Washington is committed to providing equal opportunity and equal access in WIOA Title I programs and services to all individuals.
• Follow State Policy 5402 Revision 3 for additional guidance and procedures.

Supersedes:
All of these documents have been superseded by this policy and the accompanying handbooks.

WSW Policies:
• 2004 revision 1 and 2 Complaint Resolution
• Complaint Handbook dated July 2013

State Policies/Guidance:
• WorkSource Policy 1012, Revision 1 and Handbook
• WIOA Policy 5402 Revision 2 dated 12/12/18

References:
See individual policies for resources and reference links.

Website:

Attachments:
Attachment A: Customer Concern and Complaint Resolution Policy 1012 Revision 2
Attachment B: WorkSource System Discrimination Complaint Processing Policy 1017
Attachment C: Equal Opportunity and Nondiscrimination Policy 5402 Revision 3
Attachment D: WorkSource Program Complaint Handbook
INTEGRATED SERVICE DELIVERY

POLICY #: 4010

Date of Original Policy: 9/14/2022

Purpose:
Workforce Southwest Washington (WSW) is issuing this policy to set standards for delivering integrated service delivery with co-enrollment through WorkSource and as applicable, affiliate sites.

Background:
The Workforce Innovation and Opportunity Act (WIOA) provides the basis for an integrated workforce system aligned to address employer and job seeker needs. The Act defines a single set of outcome metrics for the federal workforce programs encompassed by the Act. It encourages integrating intake, case management, and reporting systems. It eliminates “sequence of services” in favor of a workforce system that meets the unique needs of individuals seeking services. It encourages local areas to provide more access to “real-world” education and workforce development opportunities through on-the-job training, incumbent worker, and customized training and sector and pathway strategies.

Co-enrolled Integrated Service Delivery (ISD) is the delivery of WorkSource services in a manner that aligns/braids the resources of participating partners to seamlessly address the training and employment needs of job seeker and business customers. Co-enrolled ISD uses co-enrollment to reduce duplicative and administrative activities in favor of positive customer experiences. This allows service delivery partners to use their resources for value-added services to ensure that job seekers have the skills to succeed in the regional economy. Co-enrolled ISD creates a warm and meaningful welcome and a quick connection to resources. Rather than simply providing a “countable” service, co-enrolled ISD immediately connects the customer to a robust set of high-value system resources relevant to local and regional economies, including assessment, skill development, work-readiness, skill validation and certification. Staff working in a co-enrollment ISD environment are organized into functional teams (rather than by programmatic boundaries) to meet the needs of customers.

The components of co-enrolled ISD include:

- Co-enrolling as many job seekers accessing WorkSource services as possible and braiding/directing resources to provide appropriate services, regardless of categorical eligibility.
- Organizing staff and services around functions rather than programs or agencies.
- Meeting a common set of outcome measures for all customers.
- Providing a robust menu of services that result in positive labor market outcomes (e.g., finding a job, keeping a job, and continuing on the career
ladder).

- Increase the focus on skill development, certification and work-based experiences based on what the job market requires.
- Gathering and using customer input (job seeker and business) to continuously improve services.

**Policy:**

WSW’s co-enrolled ISD policy is as follows:

a. One-Stop Centers engaging in ISD with co-enrollment must follow the requirements and procedures cited in WSW’s Integrated Service Delivery with Co-Enrollment Handbook.

b. Co-enrolled ISD does not eliminate WIOA Title I eligibility criteria. Co-enrolled ISD utilizes self-attestation for the purpose of co-enrolling job seekers into Basic Career Services. Please refer to the WSW Integrated Service Delivery with Co-Enrollment Handbook.

c. WSW supports the use of functional teams at the One-Stop Centers for co-enrollment ISD and other efforts to better align staff functions to the needs of job seekers and businesses.

**Definitions:**

Co-Enrolled Integrated Service Delivery (ISD) - The delivery of basic career services in a manner that (1) aligns/braids the resources of participating partners to quickly and seamlessly address the training and employment needs of WorkSource system job seeker and business customers while reducing duplicative and administrative activities; (2) immediately connects customers to a robust set of high-value system resources relevant to local/regional economies, including assessment, skill development, work-readiness, skill validation and certification; and (3) organizes participating partner staff into functional teams rather than by program to meet customer needs.

**References/Resources:**

- WorkSource System Policy 1019, Revision 2 – Eligibility Guidelines and Documentation Criteria
- Co-Enrolled Integrated Service Delivery Policy and Operations Manual
- WSW’s Integrated Service Delivery Handbook

**Website:**


**Attachments:**

Attachment A – Integrated Service Delivery with Co-Enrollment Handbook (PDF)
MEMO

DATE: SEPTEMBER 8, 2022

TO: WSW BOARD OF DIRECTORS

FROM: RENNY CHRISTOPHER - TREASURER OF THE BOARD
       MIRIAM HALLIDAY – CHIEF EXECUTIVE OFFICER

RE: FINANCE COMMITTEE REPORT OUT

A meeting of the WSW Finance Committee was held on August 17, 2022. 4th quarter spending reports were reviewed and discussed.

QUARTERLY REPORTS

WIOA Obligations: DOL and Employment Security have waived the requirement to have 80% of WIOA formula funding obligated by June 30, 2022.

WSW Coordination and Admin (Operations): Spending for WSW operations ended the fiscal year with spending at 95% of the budgeted total.

Grant Budget vs Actual Spending: Reports detailing competitive and other state and federal grants with fixed grant terms were presented at the meeting.

Subcontract Spending and Performance: A detailed listing of subcontract investments was presented at the meeting. Individual Subrecipient spending and performance reports were also presented. The WSW Economic Mobility Committee will review the Subrecipient reports and report to the full board.

OTHER MATTERS

The fiscal team has a new Accounts Payable Specialist -Kali Dugan.

The WSW PY21 Financial Audit field work begins October 31, 2022.
DATE: SEPTEMBER 8, 2022
TO: MIRIAM HALLIDAY- CEO
WSW BOARD OF DIRECTORS
FROM: BENTON WATEROUS, WSW DIRECTOR OF PROGRAMS
RE: FEDERAL WORKFORCE INVESTMENT EVALUATION RFP NOTIFICATION

From April 22, 2022, to June 10, 2022, Workforce Southwest Washington (WSW) conducted a public competitive procurement for the provision of comprehensive program evaluation service of its WIOA Adult + Dislocated Workers programs. The procurement’s purpose is to identify an organization best able to successfully assist WSW in analyzing the degree to which these programmatic investments individually and in the aggregate effectively meet the performance goals, key performance indicators, and investment stated in contracts. As well as accomplish the investment strategies articulated in WSW’s strategic plan.

A successful bidder will enable WSW to oversee the design and execution of an impartial, equitably administered, and inclusive program evaluation design and process that helps WSW to better understand the diverse populations it serves the degree to which its investments meet the needs of this population, the effectiveness and efficiency of its investment strategies and the longer-term impact of WSW investments upon job seekers, workers, and employers in achieving robust, equitable, and well-prepared workforce and sustainable economy in southwest Washington.

Following is a summary of the RFP process and the final recommendation of the Scoring Committee.

**Timeline**

<table>
<thead>
<tr>
<th>Description</th>
<th>DATE</th>
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<tbody>
<tr>
<td>Promotion and Outreach</td>
<td>April 22nd, 2022</td>
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<tr>
<td>RFP Opened</td>
<td>April 22nd, 2022</td>
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<tr>
<td>Bidders’ Conference: Virtual + In-person at Port of Kalama</td>
<td>April 29th, 2022</td>
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<tr>
<td>Implicit + Explicit Bias Training for Scoring Committee Members</td>
<td>June 1st, 2022</td>
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<tr>
<td>Proposals Due</td>
<td>June 10th, 2022</td>
</tr>
<tr>
<td>Scoring Committee Review &amp; Contractor Recommendation</td>
<td>July 14th, 2022</td>
</tr>
<tr>
<td>WSW Directors, CEO, COO Review</td>
<td>July 21st, 2022</td>
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<tr>
<td>Send Recommendation to Executive Board</td>
<td>July 25th, 2022</td>
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<tr>
<td>Executive Board Review</td>
<td>August 1st, 2022</td>
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<tr>
<td>Board Announcement of New Providers &amp; Contract Approval</td>
<td>August 12th, 2022</td>
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<tr>
<td>Feedback Meeting with Bidders</td>
<td>August 15th, 2022</td>
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Selection Process

A Scoring Committee formed in January 2022. Committee members include Amy Gimlin, Tamara Toles, and Kollin Bell from WSW’s staff and Renny Christopher and Chris Bailey from the WSW Board of Directors.

The following Federal Workforce Investment Evaluation proposals were reviewed by the committee –

Emsi Burning Glass

The committee scored each proposal based on a scoring rubric with the following criteria:

Criteria 1: Demonstrated Experience and Ability 25 points
Criteria 2: Relationships and Collaboration 25 points
Criteria 3: Evaluation Design 25 points
Criteria 4: Evaluator Profile 25 points

Applicants may earn a maximum of 100 points

Final Scores
Application: Federal Workforce Investment Evaluation

<table>
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<th>Proponent: Emsi Burning Glass</th>
<th>Available Points</th>
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</table>

Notification

The Federal Workforce Investment Evaluation RFP Scoring Committee met on 07/14/22. After engaging in discussion of the eligible submitted proposal, a vote was called, with the Scoring Committee members voting to approve Emsi Burning Glass’s proposal. An approval was requested to approve the procurement of Emsi Burning Glass to provide program evaluation services. Requesting to go into contract not to exceed $120,000 from December 1, 2022 – November 30, 2024.

WSW’s Executive Committee approved Emsi Burning Glass’s proposal at the August 24th Executive Committee meeting.
From: Traci Williams  
Sent: Thursday, September 8, 2022 4:28 PM  
To: Traci Williams  
Subject: RE: WSW Executive Committee Vote Needed - SummerWorks Service Provider - SW WA

Adrienne Watson – Yes  
Angela Edginton-Burckhard – Yes  
Bob Gustainis – Yes  
Jasmine Tolbert – Yes  
Jen Baker – Yes  
John Vanderkin – Yes  
Mandy Kipfer – Yes  
Mark Tishenko – Yes  
Nathan Webster – Yes  
Shannon Stull – Yes  
A.D. Simmons – Yes  
Monte Constable – Yes  
Renny Christopher – Yes  
Ted Sprague – Yes  
Ralph Clark - Yes

Haven’t heard back from the following:  
Chris Bailey  
Mike Bridges  
Bob Carroll  
Tracy Doriot  
Karin Edwards  
Lekha Fernandes  
Corey Giles  
Suba Jagannathan  
Ilona Kerby  
Mara Kieval  
Mike Nieto  
Stacey Smith

This approval passed with 15 yes votes.

Best,  
Traci

TRACI WILLIAMS  
Executive Administrator/Office Manager  
twilliams@workforcesw.org 360.567.1070 www.workforcesw.org

Workforce Southwest Washington  
805 Broadway, Suite 412 | Vancouver, WA 98660  
Follow us: Twitter | LinkedIn See our 20th Anniversary Timeline
My workday may look different than your workday. Please do not feel obligated to respond outside of your normal working hours.

From: Traci Williams <TWilliams@workforcesw.org> On Behalf Of Miriam Halliday
Sent: Thursday, July 14, 2022 2:53 PM
Cc: Traci Williams <TWilliams@workforcesw.org>; Miriam Halliday <mmartin@workforcesw.org>
Subject: WSW Executive Committee Vote Needed - SummerWorks Service Provider - SW WA
Importance: High

Good Afternoon Executive Committee members,

As shared in our last Executive Committee meeting, the SummerWorks RFP award needs your approval. The RFP has an effective date of August 1st; therefore, we are unable to wait till our next Executive Committee meeting and full Board of Directors meeting for a vote.

Please review the following RFP Memo and respond via email to Traci (cc’d) and myself with your “I approve”, or “I do not approve” as quickly as you are able.

Executive Committee Approval Needed

Approval needed to fund Equus Workforce Solutions to lead and manage the SummerWorks program across SW Washington beginning August 1st 2022 – December 31st 2023 based on their submitted proposal. Additionally, WSW seeks approval to go into contract with Equus Workforce Solutions not to exceed $300,000.

Thank you,
Traci Williams

From: Traci Williams
Sent: Thursday, September 8, 2022 4:34 PM
To: Traci Williams
Subject: RE: Full Board Approval Needed

A.D. Simmons – Yes
Angela Burckhard – Yes
Bob Carroll – Yes
Chris Bailey – Yes
Corey Giles – Yes
Ilona Kerby – Yes
Jen Baker – Yes
John Vanderkin – Yes
Karin Edwards – Yes
Lekha Fernandes – Yes
Mandy Kipfer – Yes
Mark Tishenko – Yes
Mike Bridges – Yes
Mike Nieto – Yes
Nathan Webster – Yes
Ralph Clark – Yes
Renny Christopher – Yes
Shannon Stull – Yes
Stacey Smith – Yes
Suba Jagannathan – Yes
Ted Sprague – Yes
Tracy Doriot – Yes

Haven’t heard back from the following:
Monte Constable
Bob Gustainis
Mara Kieval
Jasmine Tolbert
Adrienne Watson

This approval passed with 22 yes votes.

Best,
Traci
My workday may look different than your workday. Please do not feel obligated to respond outside of your normal working hours.

From: Traci Williams <TWilliams@workforcesw.org> On Behalf Of Miriam Halliday
Sent: Tuesday, August 30, 2022 2:53 PM
Cc: Traci Williams <TWilliams@workforcesw.org>
Subject: Full Board Approval Needed
Importance: High

WSW Board Members:

The below contract needs your approval. The Executive Committee of our Board approved in our meeting last week. The contract has an effective date of July 1st, 2022, and WSW has been operating with a Letter of Intent that expires September 1st. As such we cannot wait till September 14th.

Please respond via email to Traci (cc’d) with your “I approve”, or “I do not approve” as quickly as you are able.

Full Board Approval Needed


Equus Workforce Solutions will continue their implementation and provision of job seeker services supported by the Economic Security for All poverty reduction workforce investment via the Governor for Cowlitz and Wahkiakum counties. Funding will support job seekers who are enrolled in SNAP and need increased employment focused support to either upskill and land a quality job or reenter into the job market all together.

Thank you again and I am so looking forward to our September 14th in person meeting!

Miriam
Integrate Service Delivery with Co-enrollment Handbook Attachment A

Effective Date: September 15, 2022

Workforce Southwest Washington
805 Broadway, Suite 412
Vancouver, WA 98660
Traci Williams
twilliams@workforcesw.org
(360) 567-1070
# Table of Contents

- Introduction .......................................................................................................................... 3
- Definitions .............................................................................................................................. 4
- References ............................................................................................................................. 5
- 1. ISD and the Workforce Innovation and Opportunity Act .................................................. 6
  1.1. Purpose ............................................................................................................................. 6
  1.2. Characteristics of Integrated Service Delivery ................................................................. 6
    1.2.1. Customer Service ......................................................................................................... 6
    1.2.2. Service Design .............................................................................................................. 7
    1.2.3. Staffing ......................................................................................................................... 8
  1.3. Alignment with Washington State’s Expectations for WorkSource .................................. 9
- 2. Understanding ISD with Co-enrollment .............................................................................. 9
  2.1. Services ............................................................................................................................ 9
  2.2. Service Eligibility and Service Type ............................................................................... 10
  2.3. Program Eligibility and Enrollment into WIOA Title I Adult and Dislocated Worker .... 12
  2.4. Co-enrolling WIOA Title I and Title III Participants .................................................... 12
  2.5. Trade Assistance Act Co-enrollment .............................................................................. 13
  2.6. Program Completion and Exit under ISD ..................................................................... 13
- 3. Functional Teams ................................................................................................................ 13
  3.1 Agency Supervision vs Functional Supervision ............................................................... 14
  3.2 Common Goals of Functional Teams ............................................................................... 15
  3.3 Customer Engagement ..................................................................................................... 15
    3.3.1. Customer Flow ........................................................................................................... 15
    3.3.2. Discovery ................................................................................................................... 15
    3.3.3. Priority of Service ...................................................................................................... 15
    3.3.4. Interactive Resource Rooms ..................................................................................... 16
    3.3.5. Alternate Access ....................................................................................................... 16
    3.3.6. Web-based Technology ............................................................................................ 16
- 4. Menu of Services ................................................................................................................ 17
- 5. Continuous Quality Improvement ...................................................................................... 17
  5.1 Customer Feedback .......................................................................................................... 17
  5.2 Staff / Stakeholder Feedback ........................................................................................... 18
  5.3 Data Analysis ..................................................................................................................... 18
- 6. Common Outcomes ............................................................................................................. 18
- 7. Staff Training and Professional Development ................................................................... 19
- 8. Communication ................................................................................................................... 20
Introduction

The content of this procedural handbook outlines WSW’s Integrated Service Delivery Policy #4010. This handbook serves as the vehicle for implementing and managing Integrated Service Delivery (ISD).

This handbook provides guidance to workforce system partners and their staff for delivery and implementation of WorkSource services for the youth, adult, and dislocated worker programs under WIOA Title I of the Workforce Innovation and Opportunity Act (WIOA) and Wagner-Peyser Act under WIOA Title III.

The Integrated Service Delivery (ISD) Handbook is being issued to provide system partners with information needed for the delivery of WorkSource services in a manner that aligns the resources of participating partners to seamlessly address the training and employment needs of system customers – job seekers and businesses. ISD utilizes co-enrollment as a tool to reduce duplicative and administrative activities in favor of a positive customer experience. The information is based on the best information available at this time per WIOA law, WIOA final rules, Department of Labor (DOL) guidance, and state policies and guidance. The handbook will be revised as relevant DOL guidance is received. Compliance with this handbook will be based on the version of the handbook in effect at the time of the action or activity under review.
Definitions

- **Basic WIOA Title I Eligibility** – A determination of eligibility for WIOA Adult and Dislocated Worker-funded programs that utilizes self-attestation for documentation of appropriate eligibility criteria, federal reporting elements, and Veteran’s priority of service as defined in Section 6 of WSW Eligibility Policy Handbook - Attachment A. An individual must complete a basic WIOA Title I eligibility process for the program in question and be determined eligible to receive basic career services funded by that program.
  - **Note:** Basic WIOA Title I eligibility determination does not apply to Youth programs. All WIOA Youth program services require a full WIOA Title I eligibility determination as defined in WSW Eligibility Policy Handbook – Attachment A.

- **Co-enrollment** – The process of determining eligibility for, and enrollment into, two or more WorkSource System-funded programs for the purposes of delivering basic career services, individualized career services, supportive services, and/or training services.

- **Covered Person (for Priority of Service)** – A veteran or eligible spouse.

- **Data Element Validation (DEV)** – The federally-mandated process by which the state annually assesses the accuracy of reported participant data (refer to WorkSource System Policy 1003, Revision 2, WSW Data Element Validation Policy 3037, and TEGL 23-19).

- **Full WIOA Title I Eligibility** – A determination of eligibility for Adult, Dislocated Worker, or Youth-funded programs that requires validation beyond self-attestation of appropriate eligibility criteria, federal reporting elements, and Veteran’s priority of service as defined in WSW Eligibility Policy Handbook. Full Adult and Dislocated Worker eligibility also includes assessing need for services beyond basic career services and determination of Adult priority for service when necessary. To receive individualized career, training, and supportive services funded by an Adult or Dislocated Worker program, or Youth services funded by a Youth program, an individual must complete the full WIOA Title I eligibility process for the corresponding program and be determined eligible to receive such services under that program.

- **Self-Attestation** – Self-attestation occurs when a participant (applicant) states his or her status for a particular data element, such as pregnant or parenting youth, and then signs and dates a form acknowledging this status. The key elements for self-attestation are: (a) a participant (applicant) identifying his or her status for a permitted data element and (b) signing and dating a form attesting to this self-identification (with a disclaimer concerning the self-identification). For more information, see Self-attestation in Section 7 of WSW Eligibility Policy Handbook – Attachment A, (TEGL 23-19 – Attachment II).

- **Service Provider** – The agency that WSW is contracting with to administer WIOA services.

- **State Management Information System (MIS)** – For the purpose of Data Element Validation, State MIS refers to specific, detailed information that is stored in the state’s information system that supports a data element (TEGL 23-19).
References

- Public Law 113-128, Workforce Innovation and Opportunity Act (WIOA) of 2014
- Training and Employment Guidance Letter (TEGL) 10-09
- Training and Employment Guidance Letter (TEGL) 11-11, Change 2
- Training and Employment Guidance Letter (TEGL) 11-12
- Training and Employment Guidance Letter (TEGL) 04-15
- Training and Employment Guidance Letter (TEGL) 10-16, Change 1
- Training and Employment Guidance Letter (TEGL) 19-16
- Training and Employment Guidance Letter (TEGL) 07-18
- Training and Employment Guidance Letter (TEGL) 23-19
- ESD WIOA Policy 5612 - One-Stop Evaluation and Certification
- ESD WIOA Policy 5617, Revision 1 - Co-enrollment of TAA Participants into WIOA DW program
- WSW Trade Act and Dislocated Worker Co-enrollment Policy 3036 Rev 1
- ESD WorkSource System Policy 1003, Revision 2 - Data Element Validation
- WSW Data Element Validation Policy 3037
- ESD WorkSource System Policy 1009, Revision 3 - Priority of Service for Veterans and Eligible Spouses
- WSW Veterans Priority of Service and Eligibility Policy 3019 Rev 2
- ESD WorkSource System Policy 1019, Revision 6 – Eligibility Guidelines and Documentation Requirements
- WSW Eligibility Guidelines and Documentation Requirements Policy 3028 Rev 4
- WSW Eligibility Policy Handbook – Attachment A
- ESD WorkSource System Policy 1023, Revision 1 - Co-Enrolled ISD Policy and Operations Manual
1. ISD and the Workforce Innovation and Opportunity Act

1.1. Purpose

The WIOA vision for the workforce system (TEGL 04-15) is that partner providers, programs, and other entities are jointly responsible for the collaboration of 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 all services as is eligible and supportive of participant outcomes. 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; Title IV vocational rehabilitation program); and the Trade Adjustment Assistance program, as well as other required and optional partners identified in WIOA. Through WorkSource, these partner programs and their service providers ensure that businesses and customers have access to information and services that lead to positive participant outcomes.

The management of the integrated service delivery (ISD) model for the One-Stop Center is the shared responsibility of WSW, the core WIOA partners, other required partners, and the one-stop center operator. ISD is a powerful tool for realizing the potential of WIOA by streamlining administrative processes to direct more of the system’s limited resources to value-added customer interactions. By braiding resources and programs provided under WIOA and redefining customer flow and access to services, ISD supports more efficient use of system resources on behalf of customers and employers. Co-enrollment, a crucial part of ISD, removes the barriers created by categorical customer eligibility requirements—staff can serve nearly any customer because most customers are enrolled into multiple programs. This manual describes the One-Stop Center’s approach to ISD with co-enrollment.

1.2. Characteristics of Integrated Service Delivery

The characteristics identified below, consistent with the purpose and authorized scope of each program participating in ISD, are designed to reflect elements that contribute to a high-quality, integrated one-stop delivery system:

1.2.1. Customer Service

- **Cultivate a welcoming environment**: All WorkSource center staff are courteous, polite, responsive, and helpful to customers, businesses, and others who visit the one-stop centers, either in-person or virtually. Moreover, one-stop center staff are sensitive to the unique needs of individuals with disabilities and are prepared to provide necessary accommodations. Center leadership implement trauma-informed care and Diversity, Equity, and Inclusion best practices to ensure the one-stop and included services are accessible to diverse populations and that programs and service delivery are free of discrimination and systemic inequity.

- **Develop, offer, and deliver quality business services**: Using the [Coordinated Business Services Policy](#) as a guide, assist businesses with quality jobs, or who want to improve job quality, in overcoming the challenges of recruiting, retaining, and developing talent for the regional economy. To support area employers most effectively, WorkSource
center staff identify and have a clear understanding of skill needs, identify appropriate strategies to develop talent in a way that meets those skill needs, assisting employers, and coordinating business services activities across one-stop center partner programs, as appropriate. This includes the incorporation of an integrated and aligned business services strategy among one-stop center partners to present a unified voice for the WorkSource Centers in its communications with employers.

- **Improve the skills of job seeker and worker customers:** Offer access to education and training leading to industry-recognized credentials through the use of career pathways, apprenticeships, and other strategies that enable customers, including those with disabilities, to acquire sustainable and living-wage employment. Provide businesses with access to the quantity and quality of talent they need and support upskill/backfill strategies that expand job opportunities in the community, as well as incentivize employers to adopt quality job standards including self-sufficiency wages, predictable hours, and inclusive practices that will make them employers of choice.

- **Create opportunities for individuals at all skill levels and levels of experience:** Provide all customers as much timely information as possible that is labor market and job-driven; and provide customers as much choice as possible related to education and training, careers, and service delivery options, while offering customers the opportunity to receive both skill-development and job placement services.

- **Provide career services that motivate, support, and empower customers:** Including for individuals with disabilities, provide services to make informed decisions based on local and regional economic demand and effectively attain their personal employment and education goals.

- **Value skill development:** Assess and improve each individual's basic, occupational, and employability skills.

**1.2.2. Service Design**

- **Use an integrated and expert intake process for all customers:** Staff are highly familiar with the functions and basic eligibility requirements of each program and can appropriately assist customers and make knowledgeable referrals to partner programs as needed and as appropriate given the authorized scope of each program. This also must center the implementation of trauma-informed care and Diversity, Equity, and Inclusion best practices to ensure that intake practices are inclusive, and that programs and service delivery are free of discrimination and systemic inequity.

- **Balance traditional labor exchange services with strategic talent development:** Use market-driven principles and labor market information that help create a talent pipeline that is defined by a regional economy, its demographics, its workforce and its assets and gaps in skills and resources.

- **Ensure meaningful access to all customers:** Be physically and programatically accessible to all customers, including individuals with disabilities. In so doing, the Vancouver and Cowlitz/Wahkiakum WorkSource centers use principles of universal design, trauma-informed care, and human-centered design, such as flexibility in space usage; the use of pictorial, written, verbal and tactile modes to present information for customers with disabilities or limited English proficiency; provision of clear lines of sight to information for seated or standing users; provision of necessary accommodations; and provision of adequate space for the use of assistive devices or personal assistants. Center leadership must facilitate and implement detailed Diversity, Equity, and Inclusion policies and practice to assure that all participants, especially those from historically
underserved populations, are guaranteed equitable access to services.

- **Include both virtual and center-based service delivery**: Both methods of delivery support the talent needs of the regional economy, although each may better serve different customers with different levels of service needs at any given time. The WorkSource centers expand its reach by delivering robust virtual services and increasing the accessibility of those services through community partners such as libraries, community and faith-based organizations, housing authorities and other locations as deemed as a priority by the WorkSource leadership.

- **Incorporate innovative and evidence-based delivery models**: Use models that improve the integration of education and training, create career pathways that lead to industry recognized credentials, encourage work-based learning, and use state-of-the-art technology to accelerate learning and promote career success.

### 1.2.3. Staffing

- **Establish robust partnerships**: One-stop center operators facilitate an integrated, co-located American Jobs Center that seamlessly incorporates services of the core partners and other one-stop center partners. This includes close, constant communication between in center partners, as well as active efforts to align services.

- **Organize and integrate services by function (rather than by program)**: Provide services by function by coordinating staff communication, capacity building, and training efforts (when permitted by a program’s authorizing statute and as appropriate). Functional alignment includes having one-stop center staff who perform similar tasks serve on relevant functional teams. Service integration focuses on serving all customers seamlessly (including priority populations) by providing a full range of services staffed by cross-functional teams, consistent with the purpose, scope, and requirements of each program.

- **Develop and implement operational policies that reflect an integrated system**: Use performance, communication, eligibility, case management, technology, and other related policies to achieve integration and expanded service offerings.

- **Use common performance indicators**: Ensure that federal investments in employment and training programs are evidence-based, labor market driven, and accountable to participants and taxpayers. Ensure that participation in programs have measurable, material benefits to participants lives, especially in achieving sustainable employment and living wages. Ensure performance is transparent and accountable to the communities and regions served; data entry staff are trained and understand the importance of data validation, data collection processes, and the importance of accurate reporting.

- **Train and equip one-stop center staff**: Provide ongoing learning to provide staff with the knowledge, skills, and motivation to provide superior service to businesses and customers, including those with disabilities, in an integrated, regionally focused framework of service delivery. WorkSource system staff are cross trained, as appropriate, to increase staff capacity, expertise, and efficiency. Cross-training allows staff from differing programs to understand every program and to share their expertise about the needs of specific populations so that all staff can better serve all customers. This includes implementing consistent, mandatory training regarding Diversity, Equity, and Inclusions topics to assure a shared vocabulary on DEI related topics for the purpose of implementing DEI best practices. WorkSource system staff are routinely trained and are keenly aware of how their particular function supports and contributes to the overall vision of the local board.
• **Staff highly-trained Case Managers:** Ensure, through hiring practices and/or upskilling, that staff who advise and support customers are knowledgeable about in-demand and high-wage occupations, have access to information about available services inside and outside the WorkSource centers, are skilled in developing customers' skills for employment success, and embody Diversity, Equity, and Inclusion best practices, to create an inclusive and non-discriminatory customer experience.

1.3. Alignment with Washington State’s Expectations for WorkSource

WIOA Title I Policy 5612 (One-Stop Certification and Evaluation) describes WorkSource as a seamless customer-focused service delivery network. The principles outlined in the policy apply to the ISD environment and are as follows:

- **Integrated** – Think and act as an integrated system of partners that share common goals with services delivered by multiple organizations with the best capabilities for a seamless customer experience.
- **Accountable** – Committed to high quality, inclusive customer services with regular program performance review based on shared data and actions that enhance outcomes.
- **Universal access** – Meet the needs of customers by ensuring universal access to programs, services, and activities for all eligible individuals, with operationalized Diversity, Equity, and Inclusion practices to ensure program access for priority populations.
- **Continuous improvement** – Create a delivery system that utilizes feedback from employers and customers to challenge the status quo and inequitable processes and innovates to drive measurable improvements in performance and outcomes.
- **Partnership** – Align goals, resources, and initiatives with economic development, business, labor, and education partners.
- **Regional strategy** - Work with counterparts to address broader workforce needs of the regional economy and leverage resources to provide a higher quality and level of services.

2. Understanding ISD with Co-enrollment

This handbook addresses co-enrollment of WIOA Title I Adults and Dislocated Workers, WIOA Title III Wagner Peyser participants, and Trade Assistance Act participants. When as many customers as possible are co-enrolled into these programs, staff funded by these programs can share responsibilities for serving customers more interchangeably.

2.1. Services

WIOA identified a common set of career services that must be available to customers accessing the WorkSource system. Career services identified as basic career services must be accessible to all customers seeking employment and training services. Career Services identified as individualized career services must be made available to customers who need these services to obtain or retain employment. WIOA requires coordination in the delivery of career services by Title I and Title III funded staff to assure access for all customers. The WorkSource System accomplishes this coordination through co-enrollment into Title I and Title III programs.
Training and supportive services are also available to customers accessing the WorkSource system when determined to need such services to obtain or retain employment. While these services cannot be provided by WIOA Title III funded staff, co-enrollment into non-Title III programs will be utilized as needed to provide these services under the Integrated Service Delivery model. Basic career, individualized career, training, and supportive services are detailed in Section 1 of WSW Eligibility Handbook Attachment A.

2.2 Service Eligibility and Service Type

Services are divided into different categories. Each category, or type, of service has eligibility requirements that must be met (in addition to program eligibility) to receive a service under that category. There are two types of program eligibility for services, Basic and Full, described below. Staff should be aware of an individual’s level of eligibility prior to delivering a service. Staff should also be aware of which category each service falls under according to the WSW Eligibility Handbook. Below is each service category and the eligibility requirements to receive a service under that category:

<table>
<thead>
<tr>
<th>Basic Career – Informational &amp; Self</th>
<th>Basic Career – Staff-Assisted</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Informational services do not require WorkSourceWA.com registration.</td>
<td>• Requires WorkSourceWA.com registration.</td>
</tr>
<tr>
<td>• Most self-services require WorkSourceWA.com registration.</td>
<td>• Enrollment into WIOA Title III Employment Services (Wagner-Peyser) occurs automatically.</td>
</tr>
<tr>
<td>• Does not require an eligibility determination.</td>
<td>• Basic WIOA Title I Eligibility determination is required.</td>
</tr>
<tr>
<td>• Can be provided to any customer regardless of their eligibility.</td>
<td>• Being determined eligible and enrolled into a WIOA Title I program is required to receive basic career services. Individuals not enrolled in a WIOA Title I program must be provided basic career services through WIOA Title III Employment Services or another program.</td>
</tr>
<tr>
<td></td>
<td>• Can be provided to any customer regardless of their eligibility.</td>
</tr>
</tbody>
</table>
### Individualized Career Services
- Requires WorkSourceWA.com registration.
- Enrollment into WIOA Title III Employment Services (Wagner-Peyser) occurs automatically.
- Must have a Full WIOA Title I Eligibility determination.
- Being determined eligible and enrolled into a WIOA Title I program is required to receive individualized career services. Individuals not enrolled in a WIOA Title I program must be provided individualized career services through WIOA Title III Employment Services or another program.
- Can only be provided to a customer who has been determined to need individualized career services to obtain or retain employment.

### Training Services
- Requires WorkSourceWA.com registration.
- Enrollment into WIOA Title III Employment Services (Wagner-Peyser) occurs automatically.
- Must have a Full WIOA Title I Eligibility determination and be enrolled in WIOA Title I program or other program that can provide training services (Training services cannot be provided using WIOA Title III Employment Service funds).
- Because training services are not available through most fund sources, to receive a training service a customer must be determined eligible for a WIOA Title I program using a full eligibility determination and enrolled or be enrolled in another program that can provide a training service with appropriate funding sources available.
- Can only be provided to a customer who has been determined to need training services to obtain or retain employment.

### Supportive Services
- Requires WorkSourceWA.com registration.
- Enrollment into WIOA Title III Employment Services (Wagner-Peyser) does not occur automatically. A basic career, individualized career, or training service must be provided to trigger enrollment into WIOA Title III Employment Services.
- Must have a Full WIOA Title I Eligibility determination and be enrolled in a WIOA Title I program or other program that can provide supportive services (Supportive services cannot be provided using WIOA Title III Employment Services funds).
- Because supportive services are not available through most fund sources, to receive a supportive service a customer must be determined eligible for a WIOA Title I program using a full eligibility determination and enrolled or be enrolled in another program that can provide a training service such as Trade Act or WorkFirst.
- Can only be provided to a customer when necessary to participate in career or training services or when necessary to gain or retain employment.

### Follow-up Services
- Requires WorkSourceWA.com registration.
- Enrollment into WIOA Title III Employment Services (Wagner-Peyser) does not occur automatically. A basic career, individualized career, or training service must be provided to trigger enrollment into WIOA Title III Employment Services.
- Must have a Full WIOA Title I Eligibility determination.
- Being determined eligible and enrolled into a WIOA Title I program is required to receive follow-up services.
- Can only be provided to a customer who has obtained unsubsidized employment and who has completed all programs the customer has been co-enrolled into. Follow-up services can be provided for up to 12 months following the last date of basic career, individualized career, or training services. Follow-up services must be provided to all youth participants for a minimum of 12 months unless the participant declines to receive follow-up services or the participant cannot be located or contacted.
2.3. Program Eligibility and Enrollment into WIOA Title I Adult and Dislocated Worker

ISD with co-enrollment aligns eligibility processes to service delivery by separating enrollment into either the Basic WIOA Title I eligibility process or the Full WIOA Title I eligibility process. Each level of eligibility is defined as follows:

- **Basic WIOA Title I Eligibility:** A determination of eligibility for WIOA Adult- and/or Dislocated Worker-funded programs that allows self-attestation for documentation of appropriate eligibility criteria, federal reporting elements, and Veteran’s priority of service as defined in Section 6 of WSW Eligibility Handbook Attachment A.

- **Full WIOA Title I Eligibility:** A determination of eligibility for Adult-, Dislocated Worker-, or Youth-funded programs that requires validation beyond self-attestation of appropriate eligibility criteria, federal reporting elements, and Veteran’s priority of service as defined in Section 6 of WSW Eligibility Handbook Attachment A. Full Adult and Dislocated Worker eligibility also includes assessing need for services beyond basic career services and determination of Adult priority of service designation when necessary.

Enrollment into Adult and/or Dislocated Worker occurs after eligibility has been determined and a qualifying service is attached to the relevant program in the state MIS.

Staff are not required to complete a Basic WIOA Title I eligibility determination prior to a Full WIOA Title I eligibility determination. When appropriate, customers may skip the Basic WIOA Title I determination and go through the Full WIOA Title I eligibility determination.

If a customer enrolled via the Basic WIOA Title I eligibility process is subsequently determined to need individualized career, training, or supportive services, to obtain or retain employment, staff must complete a Full WIOA eligibility determination to receive these services. A full eligibility determination may be completed at any time.

2.4 Co-enrolling WIOA Title I and Title III Participants

Enrollment into both WIOA Titles I and III is managed in the state MIS. After registration, simply providing a staff-assisted basic or individualized career service will automatically make a customer a Title III participant. Co-enrollment into a WIOA Title I program requires additional steps as described in WSW Eligibility Handbook.

When providing an intake, staff should explain that completing the intake process will in no way effect their eligibility to receive career services (such as resume review, workshops, or UI assistance). The questions asked are to assure all available services will be provided to the customer. If the seeker is asking for training or supportive services, staff should explain that to receive those services a few more questions need to be asked and that eligibility to receive those services is not guaranteed.

Staff should not spend time explaining program eligibility or the differences in programs to customers and should instead focus on concrete and specific program activities, benefits, and services. Staff should avoid using the term co-enrollment as it has a very specific meaning in this process. Instead, staff should help customers move efficiently through the process, answering customer questions completely and respectfully in a manner which focuses on the customer experience rather than granular questions of policy.
2.5. Trade Adjustment Assistance (TAA) Co-enrollment

Per ESD Policy 5617, R1 and WSW Policy 3036 Rev 1, TAA participants must be co-enrolled in the WIOA Title I Dislocated Worker program if they are determined eligible, unless the participant declines. Co-enrollment under ISD supports the requirements listed in this policy as follows:

- **Referrals from TAA** – Under ISD, all participants, including TAA program participants, are screened for eligibility for WIOA Title I Adult and Dislocated Worker programs and enrolled in these programs.
- **Enrollment in a timely manner** – As part of the WIOA Title I Full Assessment process, participants must be co-enrolled into WIOA Title I Adult and/or Dislocated Worker as soon as eligibility and service need have been established. There is no waiting period for enrollment into Dislocated Worker.
- **TAA program coordination** – Eligibility screening for WIOA Title I programs is initiated by TAA staff. TAA staff offer the participant the chance to decline eligibility screening for Dislocated Worker programs at this time, ensuring that the TAA program is aware of the participant’s enrollment status.

2.6. Program Completion and Exit under ISD

All co-enrolled customers receiving a staff-assisted service become part of the Title III Employment Service exit pool, most will become part of the Title I Adult exit pool, and many will be included in the Title I Dislocated Worker and Trade Assistance Act exit pools. Tracking and managing program outcomes for this large volume of customers exiting each program may be time consuming. Co-enrolled ISD processes are designed to assure that staff time is spent serving customers rather than managing administrative tasks, like recording outcome information. Therefore, staff operating in a co-enrolled ISD model do not manage program outcomes for customers enrolled for Basic Career Services only. Customers are automatically exited from all program-funded services ninety days after the last service they receive. Outcome information does not need to be collected and entered into the state MIS. If services are requested after program exit, follow-up services may be provided, or the customer may have their eligibility for basic services re-determined as appropriate.

Service Provider staff are expected to manage program outcomes for customers receiving training services and must make available follow-up services to all program completers obtaining unsubsidized employment (including registered apprenticeship) or self-employment for up to 12 months after their last qualifying service.

Customers who are entered into Launchpad’s Qualified Talent Pool will be managed for placement outcomes. Service provider staff are expected to document placement in Launchpad following the instructions in the Launchpad Desk Aid for Talent Pool & Business Services.

3. Functional Teams

Part of the ISD framework is a concept known as functional teams. Functional teams are groupings of staff based on functions, such as assessment or career advising, rather than by
program or employing organization. Staff are still expected to report to their direct supervisor in the organization that funds their position, but their day-to-day work is coordinated by a supervisor within the functional team they reside, who may work for a different organization and/or be funded by a different fund source, and who are designated by the One Stop Operator and other WorkSource Leadership. Functional teams support increased coordination and collaboration within WorkSource to maximize system capacity and to serve customers more effectively and efficiently. It is critical for those providing services in a co-enrolled ISD environment to embrace a cooperative, functional leadership model so that the capacity, talents, and skills of staff can be leveraged for a larger and more diverse population of customers. Staff should utilize their skills in support of common processes and goals, regardless of which agency funds them.

3.1 Agency Supervision vs Functional Supervision

Functional teams are led by a functional supervisor, who likely will supervise staff who are employed both by their own agency and by other partner agencies. The table below illustrates how functional and agency supervisors share responsibility for staff supervision. The table does not represent a full list of supervisory or leadership roles and responsibilities in a functional leadership situation. It only illustrates some common differences between the roles of an agency supervisor and functional supervisor. Staff continue to be responsible for reporting to their agency supervisor while keeping functional supervisors and peers informed as part of their cross-functional communication responsibilities.

<table>
<thead>
<tr>
<th>Agency Supervisor Expectations</th>
<th>Functional Supervisor Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Collaborate with functional supervisors and one-stop operator to ensure strong communication is in place.</td>
<td>• Collaborate with agency supervisor and one-stop operator to ensure strong communication is in place.</td>
</tr>
<tr>
<td>• Approve work schedules created by functional supervisors.</td>
<td>• Provide guidance and technical assistance to staff.</td>
</tr>
<tr>
<td>• Conduct performance evaluations and manage staff performance, including improvement plans or redeployment, considering input from functional supervisors.</td>
<td>• Organize, maintain and communicate schedule for team staff.</td>
</tr>
<tr>
<td>• Hire or terminate staff.</td>
<td>• Prepare and provide functional team training for staff.</td>
</tr>
<tr>
<td>• Approve staff travel requests.</td>
<td>• Create and share reports regarding team activity, including tracking and analyzing services provided by each team.</td>
</tr>
<tr>
<td>• Approve staff travel requests and reimbursements.</td>
<td>• Forward issues regarding staff to the agency supervisor to resolve.</td>
</tr>
<tr>
<td>• Respond to formal and informal complaints of harassment or discrimination made by or against staff and notify Local EO Officer.</td>
<td>• Provide input to agency supervisor regarding performance evaluations.</td>
</tr>
<tr>
<td>• Communicate outcomes of any issues involving agency staff with their functional supervisor.</td>
<td>• Respond to formal and informal complaints of harassment or discrimination made by or against customers and notify Local EO Officer.</td>
</tr>
<tr>
<td>• Ensure EEO legal requirements.</td>
<td>• Ensure EEO legal requirements.</td>
</tr>
</tbody>
</table>
3.2 Common Goals of Functional Teams

Below are common goals to be achieved through the use of functional teams:

- Focus staff expertise on a few specific skills rather than limited expertise on many general skills.
- Eliminate language, processes, and activities that perpetuate program “silos” or program operations in which partners or departments are isolated based on task, employer, or role.
- Develop staff competencies, including Diversity, Equity, and Inclusion practice.
- Cross-train staff to develop strategic competencies and talents and knowledge.
- Provide opportunities for professional development.
- Improve communication and collaboration between different programs and agencies.
- Define staff expectations by function rather than program or agency.
- Defined common terms, processes, and outcomes.

3.3 Customer Engagement

Functional teams are designed in ways to provide customers and employers with a value-added service as close to the first point of contact as possible. This is where these customers develop their first impression of WorkSource. Every interaction with a functional team should be a value-added interaction for the customer. Below are components of ISD that help ensure customers have the greatest opportunity to receive a value-added interaction.

3.3.1. Customer Flow

Functional teams under ISD organize their space, staff, and processes in ways to reduce customer wait times, eliminate lines, and connect customers to value-added services as quickly as possible. This includes maintaining flexibility with staff coverage to respond to changes in customer volume.

3.3.2. Discovery

Discovery is a process adopted by each functional team that helps staff identify a customer’s service needs and employment goal (including employer hiring/service needs) to provide or refer to the right resources. Discovery requires all staff to be knowledgeable about all WorkSource services and which functional teams provide these services. This process also requires empathy without judgement, active listening, intercultural competency and anti-discrimination practice, and asking appropriate questions to clearly define next steps in the customer’s journey. The results of the discovery process must be documented in the state MIS so that it can be reviewed by other staff as necessary.

3.3.3. Priority of Service

Under ISD, service delivery must align with federal law, regulations, and guidance on Priority of Service. Since most customers served by WorkSource staff are co-enrolled in WIOA Title I Adult and WIOA Title III Employment Services (Wagner-Peyser), Priority of Service must be determined for all customers seeking individualized career, supportive, or training services. Priority of service entitles eligible veterans and spouses, individuals who are low-income or
receiving public assistance, and individuals who are basic skills deficient, to enrollment and services before eligible non-covered persons.

Customers seeking basic career services are not subject to this requirement. Customers seeking individualized career, training, or supportive services must be assessed to determine their eligibility and priority level. Individuals must be given priority to services in the order of their priority level. The matrix below describes the order and rationale for prioritization based on the requirements in WIOA. For purposes of this section, the term “covered person(s)” refers to veterans and eligible spouses per Section 5 of WSW Eligibility Handbook – Attachment A.

Priority requirements for enrollment and service delivery are as follows:

<table>
<thead>
<tr>
<th>Priority</th>
<th>Mandatory Priority Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>Covered persons (veterans and eligible spouses) who are recipients of public assistance, other low-income individuals, or are basic skills deficient (see Definitions)</td>
</tr>
<tr>
<td>Second</td>
<td>Non-covered persons who are recipients of public assistance, other low-income individuals, or are basic skills deficient.</td>
</tr>
<tr>
<td>Third</td>
<td>Covered persons who are not recipients of public assistance, not other low-income individuals, and not basic skills deficient.</td>
</tr>
<tr>
<td>Fourth</td>
<td>Individuals (non-covered persons) who are not low-income and are not recipients of public assistance with income under 175% of poverty and are not basic skills deficient.</td>
</tr>
<tr>
<td>Fifth</td>
<td>Eligible adults who do not fit into the four priorities listed above may be served on a case-by-case basis. Customers served under this fifth priority must:  • Be approved in writing by a designated WSW staff person; and  • Be submitted &amp; given approval using a standard format; and  • Include the estimated amount of WIOA adult funds to be spent on the individual; and  The adult applicant must have one or more significant barriers to full-time employment leading to self-sufficiency, including but not limited to a disability.</td>
</tr>
</tbody>
</table>

3.3.4. Interactive Resource Rooms

Interactive Resource Rooms allow staff to easily connect customers with services and expand the availability of online resources that help customers achieve their goals. Resource rooms provide an ideal opportunity for staff to proactively interact with customers. Staff should still be mindful of those who choose to work independently but be available when customers need assistance and readily offer assistance to new and returning customers. Virtual services and resources may also be provided.

3.3.5. Alternate Access

ISD emphasizes the importance of maximizing access to services for all customers. This could include making services available outside regular business hours, providing services over the phone or by e-mail, via other virtual platforms, providing services at connection sites, and providing services elsewhere out in the community. Functional teams should consider mechanisms that allow staff to be flexible in accommodating access to services for customers where possible and practical.

3.3.6. Web-based Technology
Web-based technology and virtual services are commonplace in the job market. Staff must be ready to help customers and employers’ access user-friendly, web-based technology to the greatest extent possible. These technologies include WorkSourceWA.com and could also include electronic assessments, online learning/certification, and solutions for those with disabilities or other barriers to access, as well as virtualized assessment, workshops, and case management. Staff must have the skills to support advances in digital literacy skills, use social media, and accelerate skill acquisition and credential attainment of customers.

4. Menu of Services

Meeting customer needs requires the availability of an easily accessible and robust menu of services delivered in a variety of formats and designed to support positive labor market outcomes. As a result, ISD with co-enrollment has a greater focus on assessment, skill development and skill certification.

To accomplish this, WorkSource staff and partners will make greater use of online assessments, online training courses and certification exams; recorded workshops or workshops available through web-based technology; and other online services where possible and practical. This requires staff to become more knowledgeable about these options and be able to connect customers to them.

5. Continuous Quality Improvement

One of the pillars the ISD model is built on is an expectation of continuous quality improvement (CQI). CQI is managed primarily in three ways: customer feedback, staff/stakeholder feedback, and data analysis. To ensure customer interactions remain value-added, continually assessing and improving customer service delivery and flow is necessary. Staff should continually gather and utilize customer feedback to improve customer engagement.

5.1 Customer Feedback

Customer feedback helps drive continuous improvement by soliciting information directly from those who are the most impacted by the services WorkSource provides. Staff are encouraged to utilize as many sources of customer feedback as possible, both formal and informal. Routinely acting on the information they receive creates a culture in which continued evolution better meets the real needs of customers, rather than perceptions about what customers might want. It is incumbent upon WorkSource to request customer feedback in accessible, inclusive, and culturally competent ways that assure that all WorkSource customers are able to have their feedback heard.

Sources of customer feedback may include but are not limited to the following:

- **Online customer satisfaction survey**: Shortcuts to online surveys on the computer desktops in resource rooms, kiosks, or classrooms so customers can easily give feedback from computer workstations. Staff should regularly encourage customers to fill these out and assure them that their input and opinions matter and have a direct impact on how services are designed, and business is conducted.
- **Traditional customer satisfaction survey**: Copies conveniently located at multiple access points so customers can easily provide feedback. Staff should regularly
encourage customers to fill these out and assure them that their input and opinions matter and have a direct impact on how services are designed, and business is conducted.

- **Feedback boxes:** A passive and anonymous feedback box, where customers can voice their own thoughts about what needs to be improved, what's working, or anything else that is on their minds.
- **System-wide quarterly survey events:** Proactive survey events of the workforce system (customers and employers) each quarter to track trends over time. These events typically occur over a set period of time and are frequently advertised by WorkSource leadership.
- **Customer focus groups:** Convening groups of customers (job seekers and employers) using a specific set of questions to solicit feedback to improve service delivery.

All customer feedback should be reviewed on a regular basis by leadership and staff for consideration and follow-up. This feedback should be utilized to adjust service flows, expand or change resources available, and streamline processes. Any feedback and actions resulting from such feedback should be available for review by WorkSource staff, WSW Staff, and other relevant stakeholders.

5.2 **Staff / Stakeholder Feedback**

Staff and stakeholder feedback helps drive continuous improvement by soliciting information from staff and stakeholders of the WorkSource system rather than customers and employers. Staff often have perspectives about customer flow and processes from behind the scenes that customers and employers are not aware. Stakeholders often have perspectives about WorkSource and its services from an external viewpoint that may not be apparent to customers or staff. WorkSource leadership is encouraged to utilize as many sources of staff & stakeholder feedback as possible, both formal and informal. It is incumbent upon WorkSource to request staff feedback in accessible, inclusive, and culturally competent ways that assure that all WorkSource staff are able to have their feedback heard.

5.3 **Data Analysis**

The ISD model promotes the collection of data not otherwise available in a managed enrollment model. Access to a more robust amount of data allows WorkSource staff to better analyze and interpret information regarding investments in services, changes in customer flows, and organization into functional teams. Examples of how this information can be used are:

- Improve program outcomes and performance,
- Enhance the WorkSource menu of services,
- Improve program design, and
- Accommodate common case management systems.

6. **Common Outcomes**

WIOA provides a common set of outcome measures for Title I and Title III programs. In a traditional managed enrollment model, Title I participation episodes are closely monitored to manage performance outcomes. Under ISD, it is not possible to manage the performance of Title I Adult and Dislocated Worker enrolled participants in the same way that has been done under a managed enrollment model. Staff will no longer be able to manage enrollments and exits for most customers, and therefore should not be concerned about capturing
completion data for those receiving only basic career services. This will free staff to focus instead on providing high quality services to customers and employers and connecting more customers to more careers. The expectation is that increased access to staff and services results in better performance.

While staff do not have to capture completion data for customers receiving basic services only, staff are still expected to capture program outcomes for customers receiving individualized career, training, and/or support services and must provide follow-up services to all program completers obtaining unsubsidized employment (including registered apprenticeship) or self-employment for up to 12 months after their last qualifying service.

The common outcome measures shared by Title I and Title III programs are as follows:

<table>
<thead>
<tr>
<th>WIOA Title I Adult &amp; Dislocated Worker</th>
<th>WIOA Title III Employment Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>For seekers receiving any staff-assisted service</td>
<td></td>
</tr>
<tr>
<td>2nd Quarter Employment</td>
<td>2nd Quarter Employment</td>
</tr>
<tr>
<td>2nd Quarter Median Earnings</td>
<td>2nd Quarter Median Earnings</td>
</tr>
<tr>
<td>4th Quarter Employment</td>
<td>4th Quarter Employment</td>
</tr>
<tr>
<td>For seekers receiving training services only</td>
<td></td>
</tr>
<tr>
<td>Credential Earned</td>
<td></td>
</tr>
<tr>
<td>Measurable Skill Gain</td>
<td></td>
</tr>
</tbody>
</table>

### 7. Staff Training and Professional Development

ISD requires staff to operate in new ways and to continually update service delivery based on customer input and changing labor market requirements. Finding ways to help customers more successfully access resources, working in functional teams, and jointly assisting customers identify and implement their next steps can be facilitated by on-going training and professional development. Training can be facilitated in variety of ways, such as in-person, through webinars, and self-paced e-learning modules. Professional certifications can help staff document their knowledge and skills and advance in their careers.

One-Stop Operator are expected to regularly develop training opportunities and staff are expected to participate regularly in training. Organizations providing staff to WorkSource are expected to ensure that their staff participate in appropriate trainings.

WorkSource is expected to implement regular staff training focusing on Diversity, Equity, and Inclusion best practices, and take steps to operationalize these best practices into service delivery, staff interaction, and other WorkSource functions.

WorkSource leadership or WSW may also promote or require the attainment of specific certifications of staff.
8. Communication

Communication at all levels is crucial to the success of ISD. To share customers and functions, effective and frequent communication is necessary. Communication guidelines for ISD are as follows:

- Transparent and direct communication must be consistently applied to all partners of ISD.
- All staff identify themselves as employees of WorkSource rather than their agency or program.
- Frontline staff are included early in new program or service change considerations and receive timely and consistent communication from WorkSource leadership regarding these changes.