**OPERATIONALIZING CO-ENROLLMENT: STATE TEAM ACTION PLAN**

May 2018

PA Ideal Vision of Co-enrollment

State Organizational and Infrastructure Structure
- No wrong door for prospective customers regardless of their first point of entry into the workforce development system

Customer Experience
- All customers receive a similar high-quality experience
- Each customer has one case manager to guide the customer across the system, or coordinated, intentional co-case management across programs
- One intake process, including using the same assessment to determine education-functioning level and need for remedial courses, and eligibility for programs/training
- One referral process
- CareerLinks® are physically and programmatically accessible to all customers (e.g. accommodations, universal design, assistive technology current and not outdated, staff trained on assistive technology, etc.)

Data Tracking and Sharing
- One database for case management, performance tracking, etc.
- Case managers have access to the same information (e.g. program details, case management notes, employment and education plans, etc.)
- Case managers, CareerLink® staff, and program partners cross-trained on all programs
- Customer information is properly secured in accordance with personally identifiable information guidelines
- Data shared with other programs, for those programs’ purposes, only after the informed written consent of the individual has been obtained, where required

Policy/Leadership/Guidance
- No duplication of services or effort for customers or programs
- State policies are coordinated across agencies and the programs, perhaps issued jointly by agencies
- State policies are not in conflict and support each other
- Rigorous evaluation of workforce system in support of continuous improvement
**Operationalizing Co-Enrollment: State Team Action Plan**

<table>
<thead>
<tr>
<th>WHAT DO WE WANT TO DO?</th>
<th>HOW WILL WE GET THERE?</th>
<th>HOW LONG WILL IT TAKE?</th>
<th>WHO IS RESPONSIBLE?</th>
<th>HOW WILL WE KNOW WE ARE SUCCESSFUL?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategies, approaches, models</td>
<td>Specific action steps</td>
<td>Assign a time</td>
<td>Person or organization accountable</td>
<td>Measure?</td>
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**Think SMART:** Specific (simple, sensible, significant). Measurable (meaningful, outcome-based). Achievable (agreed, attainable, assignable). Relevant (reasonable, realistic and resourced, results-based). Time-bound (time-based, time limited, time/cost limited)

**Coordinated policy development process**
- Connect with states that have successfully coordinated/issued joint directives; identify best practices (e.g. MA)
- Review current commonwealth agency policy development processes
- Convene relevant stakeholders (e.g. LWDBs/PWDA, relevant state agencies, PA WDB, collective bargaining units, etc.) to identify process improvements, including when to engage stakeholders and how they can contribute to process
- Engage stakeholder leadership around changing process and roles, including the possibility of issuing joint policies and guidance, and review of draft policies and guidance
- Include stakeholders in research and policy development

<table>
<thead>
<tr>
<th>3-6 months</th>
<th>Allison Jones, Dan Kuba, Mike White and Tara Williams, L&amp;I Volunteers from Co-enrollment cohort</th>
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Develop a coordinated/joint process for policy development, streamlined and more efficient
Develop and issue a coordinated/joint workforce policy directive
Possible policies: Operator, MOU, Co-enrollment Policy, Cross-training
# Operationalizing Co-Enrollment: State Team Action Plan

<table>
<thead>
<tr>
<th>MOU Template and Guidance</th>
<th>Co-enrollment General Guidance</th>
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<tbody>
<tr>
<td>• Review statewide and local MOU guidance from other states that emphasize co-enrollment, including data sharing, privacy, referrals (e.g. MA, DC MOUs on Adult Ed, Voc Rehab/Disability, etc.)</td>
<td>• Review co-enrollment guidance from other states, LWDBs, etc.</td>
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<tr>
<td>• Review PA MOU template (move from basic to engaged partners)</td>
<td>• Convene stakeholders to develop guidance that supports co-enrollment, including clear expectations of LWDBs or possibly setting minimum requirements</td>
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<tr>
<td>• Identify changes that support co-enrollment</td>
<td>• Identify support/technical assistance structure, and local co-enrollment best practices and champions</td>
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<tr>
<td>• Use coordinated policy development process</td>
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<tr>
<td>6-9 Months</td>
<td>Possible Topics:</td>
</tr>
<tr>
<td></td>
<td>• Data sharing</td>
</tr>
<tr>
<td></td>
<td>• Referrals</td>
</tr>
<tr>
<td></td>
<td>• Standardized intake form, consent/information sharing, and assessment process (e.g. Three</td>
</tr>
<tr>
<td>Issue of coordinated policy</td>
<td>Stakeholders inform and support policy</td>
</tr>
<tr>
<td>Stakeholders are engaged and embrace the guidance to support co-enrollment</td>
<td>Increased incidence of co-enrollment</td>
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</tbody>
</table>
## Operationalizing Co-Enrollment: State Team Action Plan

**Rivers)**
- Communication and coordination of system partners to support customers, co-case management
- Delivery of services
- CWDS improvements (e.g. Workforce Connect)
- Clearly define role of operator in co-enrollment and referrals

### Cross-training Guidance and Module

- Host a focus group/listening session with 10 state and/or local WIOA staff to identify and determine how effective cross-training would look: What do folks need to know?
- Identify, review/interview existing training modules and initiatives (e.g. South Central Title I/Title II cross-training, BWDA WF/CL 101, OVR 101)
- Contact MA Co-enrollment Cohort team for details regarding their state-level cross training
- Identify promising practices based on bullets 1 and 2 and develop guidance for state/local cross training
- Disseminate, as appropriate

9 months  
KayLynn Hamilton, lead  
Volunteers from Co-enrollment Cohort  

- Develop guidance document/module/script for state and local WIOA staff
- Develop cross-training module, give training, workforce system partners completing system
- State and local staff are better informed on workforce programs and can identify opportunities for co-enrollment
- Increased incidence of co-enrollment

### Co-enrollment Session at Professional Development Event

- Convene stakeholders for a conversation around co-enrollment
- Brief stakeholders on Co-enrollment Cohort project and Action Plan
- Facilitation will be participant driven so all partners are able to

Deliver at WDB Symposium in September/October 2018 in State College  
KayLynn Hamilton, lead  
Larry Melf, lead  

- Delivery of interactive session at WDB Symposium that informs and furthers implementation of Action Plan
- Stakeholders are engaged and embrace the guidance to support co-enrollment
- Write summary report documenting
## Operationalizing Co-Enrollment: State Team Action Plan

| Role of Operator | • Host a focus group/listening session with LWDBs, operators, other partners to discuss operator role in co-enrollment  
• Develop policy to clearly define role of operator in co-enrollment and referrals  
• Incorporate policy into MOU templates | 6-12 months | Jodi Leipold-Mostel  
Volunteers from Co-enrollment Cohort | Increased participation by operator in support of co-enrollment and referrals  
Increased incidence of co-enrollment |
| Workforce Connect | • Explore whether Workforce Connect is a good fit for PA  
• Connect with other states using Workforce Connect to learn about their experience | 12 months | Volunteers from Co-enrollment Cohort |
| SARA | • Explore whether SARA is a good fit for PA  
• PA is piloting SARA in several Local Areas | 12 months | Amber Gaither, L&I |
## Operationalizing Co-Enrollment: State Team Action Plan

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<tr>
<th>Integrate Adult Basic Education and Literacy/Title II into CWDS</th>
<th>Volunteers from Co-enrollment Cohort</th>
<th>Increased two-way referrals and shared case management information between Title II and CWDS partners</th>
</tr>
</thead>
</table>
| • Data sharing MOU  
• Quantify existing co-enrollments  
• Identify Title II providers for training, testing, and pilot  
• Add Title II to CWDS “MyPlan” training and testing  
• Explore Title II testing pilot  
• Identify areas where eData V2 can interact with CWDS, identify how/if eData V2 can be integrated into CWDS | Allison Jones  
KayLynn Hamilton  
L&I BWPO and CWDS Project Manager | 12 months |