

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accessible to all customers (e.g. accommodations, universal design, assistive technology current and not outdated, staff trained on assistive technology, etc.)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

Vision for
Co-
enrollment

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WHAT DO WE WANT TO DO? <i>Strategies, approaches, models</i>	HOW WILL WE GET THERE? <i>Specific action steps</i>	HOW LONG WILL IT TAKE? <i>Assign a time</i>	WHO IS RESPONSIBLE? <i>Person or organization accountable</i>	HOW WILL WE KNOW WE ARE SUCCESSFUL? <i>Measure?</i>
<p>Think SMART: <i>Specific</i> (simple, sensible, significant). <i>Measurable</i> (meaningful, outcome-based). <i>Achievable</i> (agreed, attainable, assignable). <i>Relevant</i> (reasonable, realistic and resourced, results-based). <i>Time-bound</i> (time-based, time limited, time/cost limited)</p>				
Coordinated policy development process	<ul style="list-style-type: none"> • 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 	3-6 months	Allison Jones, Dan Kuba, Mike White and Tara Williams, L&I Volunteers from Co-enrollment cohort	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

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	<ul style="list-style-type: none"> • 			
MOU Template and Guidance	<ul style="list-style-type: none"> • 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.) • Review PA MOU template (move from basic to engaged partners) • Identify changes that support co-enrollment • Use coordinated policy development process 	6-9 Months	<p>Mike White, lead</p> <p>Dayna Johnson-Moser, BWDA</p> <p>Volunteers from Co-enrollment Cohort</p>	<p>Issuance of coordinated policy</p> <p>Stakeholders inform and support policy</p> <p>Stakeholders are engaged and embrace the guidance to support co-enrollment</p>
Co-enrollment General Guidance	<ul style="list-style-type: none"> • Review co-enrollment guidance from other states, LWDBs, etc. • Convene stakeholders to develop guidance that supports co-enrollment, including clear expectations of LWDBs or possibly setting minimum requirements • Identify support/technical assistance structure, and local co-enrollment best practices and champions • Use coordinated policy development process <p>Possible Topics:</p> <ul style="list-style-type: none"> • Data sharing • Referrals • Standardized intake form, consent/information sharing, and assessment process (e.g. Three 	3-6 months	<p>Mike White, lead</p> <p>Terry Snyder, BWDA</p> <p>Volunteers from Co-enrollment Cohort</p>	<p>Issuance of coordinated policy</p> <p>Stakeholders inform and support policy</p> <p>Stakeholders are engaged and embrace the guidance to support co-enrollment</p> <p>Increased incidence of co-enrollment</p>

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	<p>Rivers)</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<p>KayLynn Hamilton, lead</p> <p>Volunteers from Co-enrollment Cohort</p>	<p>Develop guidance document/module/script for state and local WIOA staff</p> <p>Develop cross-training module, give training, workforce system partners completing system</p> <p>State and local staff are better informed on workforce programs and can identify opportunities for co-enrollment</p> <p>Increased incidence of co-enrollment</p>
Co-enrollment Session at Professional Development Event	<ul style="list-style-type: none"> • 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	<p>KayLynn Hamilton, lead</p> <p>Larry Melf, lead</p>	<p>Delivery of interactive session at WDB Symposium that informs and furthers implementation of Action Plan</p> <p>Stakeholders are engaged and embrace the guidance to support co-enrollment</p> <p>Write summary report documenting</p>

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	<p>contribute (similar to the peer-led discussion groups at the DC in-person meeting)</p> <ul style="list-style-type: none"> ○ <i>Specific to your discussion topic (action topics), what has been a big challenge to you have been able to resolve?</i> ○ <i>Thinking about the “ideal model” of co-enrollment, where is you region/PA CareerLink® now and what do you need to get there?</i> ○ <i>Do you have a best practice or strategy that you have implemented to make progress toward the “ideal model”?</i> 		Volunteers from Co-enrollment Cohort	discussion points
Role of Operator	<ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● Explore whether SARA is a good fit for PA ● PA is piloting SARA in several Local Areas 	12 months	Amber Gaither, L&I	

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			Volunteers from Co-enrollment Cohort	
Integrate Adult Basic Education and Literacy/Title II into CWDS	<ul style="list-style-type: none"> • 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 	12 months	Allison Jones KayLynn Hamilton L&I BWPO and CWDS Project Manager	Increased two-way referrals and shared case management information between Title II and CWDS partners