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## Module 1. Transitioning To A WIA One-Stop

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### Trainer Manual Guidelines

This manual provides a step-by-step approach to training on *Transitioning To A WIA One-Stop*. This session is the first in a series of five training modules designed to help local workforce development agencies collaborate to improve customer services. The complete curriculum on *Local Partnership Building* includes:

Module 1. Transitioning To A WIA One-Stop

Module 2. Partnering and Organizational Change

Module 3. Reengineering Your One-Stop

Module 4. Customer Feedback and Continuous Improvement Under WIA

Module 5. Developing A Customer Satisfaction and Continuous Improvement System For Your One-Stop

Each module has a series of companion products. In addition to this trainer manual, products developed for Module 1 on *Transitioning To A WIA One-Stop* include a microdisk of the Microsoft PowerPoint presentation.

The best place to start with this guide is to read it through once. The guide is designed to be easy to understand. Following are points for reading and using the guide.

Sentences typed in ***bold italics*** are intended to be said by the trainer to the group.

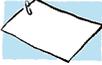
- Sentences with a bullet in front of them are action items that the trainer needs to do.

Icons on the left-hand side of the guide provide a visual view of the type of activity that is taking place. The Icon Key is provided below.

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- Use overhead slide.



- Have participants complete exercise.



- Write information on flip chart.



- Use small group work/discussion.



- Use full group discussion.



- Write “Welcome” and your name and phone number on a flipchart at front of room prior to attendees arriving. Also include your e-mail address if you have one.

***WELCOME! I'm glad you can all be with us today.***

Introduce yourself and give a brief description of your background and qualifications to lead this training module.

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- Put on title overhead.

***Welcome to the Training “Partnering for Quality Under the Workforce Investment Act.” Our team is looking forward to working with you over the next few days to help your partnerships develop the skills and tools to develop the best possible One-Stop career center system for your area.***



- Ask individuals to say who they are, where they are from, and one thing they expect to learn from this workshop. Write the answers on a flip chart. Hang the participant expectations on one wall to remind you of what should be covered.
- You may also choose other activities as “ice-breakers” to allow participants to get to know each other and to prepare them for a series of participatory training sessions.
- Be sure to set up a “parking lot” for ideas that surface.



- Put on overhead 1-2.

Briefly explain the content covered by modules 1-3.

***Module 1: Transitioning To A WIA One-Stop helps local teams understand the overall implications of WIA on the One-Stop process, understand the implications of state legislation, take stock of the current status of the partnership, develop skills for sharing resources, and begin to develop the Memorandum of Understanding under WIA.***

***Module 2: Partnering and Organizational Change helps team members from different agencies decide what they need to know about each other and why, and helps participants identify the key features of each partner’s mission, services and products, and how the agency does business. Participants will learn new ways to manage organizational change.***

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***Module 3: Reengineering Your One-Stop*** helps you learn about different partnering models, identify opportunities for collaboration in the delivery of services to help customers find jobs, reengineer these services to meet identified customer requirements, and learn how to apply these tools to a variety of service functions.



- Put on overhead 1-3.

Briefly explain the content covered in modules 4-5

***Module 4: Customer Feedback and Continuous Improvement*** will show you why customer feedback should be the foundation for designing a responsive service system and how to collect and analyze customer feedback to identify customer requirements.

***Module 5: Developing a Customer Satisfaction and Continuous Improvement System For Your One-Stop*** is an optional module customized to assist you to design and implement a continuous improvement process within your One-Stop system, including what tools to use to identify and analyze performance problems, how to establish and support process improvement teams, and how to apply continuous improvement tools to the collaboration process itself. This module will draw on the Malcolm Baldrige criteria and Simply Better resource materials.



- Put on overhead 1-4.

***This session will provide you with an overview over the goals of the Workforce Investment Act with regards to One-Stop system building and help you assess your own system building status.***



- Put on overhead 1-5.

***We are going to take a look at the One-Stop vision described in the Workforce Investment Act and what WIA expects of local partnerships.***

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*We are going to let you self-assess the progress your local partnership has made towards reaching the goals set forth in the Workforce Investment Act.*

*Having done that will then allow you to set specific goals for the remaining training modules.*



- Put on overhead 1-6.

*Let's get started with a look at what the One-Stop vision entails and how it is different from business as usual.*



- Use full group discussion.
- Before the bullets on “Fragmentation” and “Confusion of Customers” are displayed, ask participants to characterize the old system:



- Write their comments on flip chart.

Click to show bullets on slide 1-6 or uncover them if you are using an overhead projector.



- Put on overhead 1-7.

*What are the goals in the new system?*



- Use full group discussion.
- Before the bullets are displayed ask participants to characterize the goals of the new system:

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- Write their comments on flip chart.

Click to show bullets on slide 1-7 or uncover them if you are using an overhead projector.

*These goals are directly related to the content of the modules of this training:*

- 1. “Universal access” for customers requires that more services be accessible to more customers. Without enhanced partnerships this goal will be a pipe dream. Our response to the universal access goal is module 2 (Partnering and Organizational Change)*
- 2. “Customer choice” requires that we know what the customer wants. Our response to the customer choice goal is Module 3 (Collecting and Using Customer Feedback).*
- 3. “Integration of services across programs” requires in most cases that services be re-engineered. This is the objective of Module 4 (Designing a System for the Delivery of Integrated Services)*
- 4. And finally, WIA mentions “Continuous Improvement” numerous times as the primary method to ensure and improve performance outcomes for the system. Module 5 is designed to provide the necessary tools to demystify the continuous improvement process. This is an optional model but is tailored to the needs of your area.*

*There is now a new modified model to describe service delivery under WIA that takes the triangle and turns it on its side. Again as the intensity of the services increases (from left to right), the number of customers needing that level of assistance decreases.*

*There is also a basic distinction between self-service and staff assisted services.*

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- Put on overhead 1-8.

*We also have some self-service users (on the left side) who access all services entirely through the Internet or a remote location (such as a counter in a public library). We have One-Stop users in all three areas of service intensity.*



- Put on overhead 1-9.

*This slide shows the three levels of service intensity and their relation to self versus staff assisted services. Does your One-Stop have any remote access sites? If so, what types of services are they able to access from remote locations?*

- Ask the group to talk about where the division of core, intensive, and training services falls in their One-Stop right now. Is this likely to remain the same? Do they see implications for staffing reassignments or retraining?



- Put on overhead 1-10.

Read slide 1-10.

*How does your One-Stop currently share resources to fund the services its customers require? Is there a formal referral process between partners? Is it seamless to the customer?*

Hand out MOU Worksheet. This is an MOU development worksheet that contains the required and some optional sections of an “umbrella” MOU under the Workforce Investment Act.

*Throughout the training we will refer to this MOU worksheet and you can use it as a companion document to begin preparing your WIA MOU.*

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- Put on overhead 1-11.

*MOU's are required under WIA to formalize partnerships. They are also a good idea for other reasons.*

Review the bullets of slide 1-11

Ask for ways each of these would play out in the local One-Stop.



- Put on overhead 1-12.

Describe the parameters of an MOU under WIA as indicated on slide 1-12.



- Put on overhead 1-13.

Read slide 1-13.

*Are One-Stop partners currently overseeing the delivery of services or does it fall to one agency now? Who is or will be the One-Stop Operator and how will they be selected?*



- Put on overhead 1-14.

Read slide 1-14.

Ask participants to discuss the current status of their activities to redesign the One-Stop. Ask them to include involvement of front line and management staff, which partners are actively engaged and which partners need to become more involved in the process, and what is the flow of information and decision making.

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- Put on overhead 1-15.

Read slide 1-15.

*What is the current status of your One-Stop MOU development? Are all necessary partners engaged in the process? How is the WIB involved in this process? Are they relying entirely on staff or are some board members actively participating in the development of the MOU?*

*We are now going to take a look at the implications of ITAs.*



- Put on overhead 1-16.

Read slide 1-16.

*These are the three principals under WIA which have guided the development of the performance standards.*



- Put on overhead 1-17.

*These principals have been translated into better information for customers.*

Read slide 1-17.



- Put on overhead 1-18.

Read slide 1-18.

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*ITAs or Individual Training Accounts will be the method used to provide customer choice for training under WIA. While each state will probably implement ITAs differently, its uses will remain the same.*



- Put on overhead 1-19.

*ITAs are training accounts established by One-Stop operators and may be funded by adult and dislocated worker funds. They are used to obtain training services from providers who are on the approved training provider list. Youth funds may not be used to fund ITAs.*



- Put on overhead 1-20.

*ITAs appear to be one of the more difficult portions of WIA to implement. Much debate continues as to how they will actually be used.*

Read slide 1-20.

*While the state is responsible for developing an approved training provider's list, the local WIB establishes most policies for ITAs. They will set priorities for service, criteria for selection of training providers, funding caps, and limits for duration of training. Payments may be in voucher formats identified by the state or local area, electronic fund transfers, or through incremental payments during training. Most of these decisions have yet to be made.*



- Put on overhead 1-21.

Read slide 1-21.

*Initial eligibility must be determined even for those programs funded under JTPA. There are two types of applications, one locally developed for programs eligible under*

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*the Higher Education Act and the National Apprenticeship Act and one state-developed for all other programs.*



- Put on overhead 1-22.

*Program eligibility must be re-determined annually regardless of the initial eligibility and the Governor is responsible for developing this system.*



- Put on overhead 1-23.

Read slide 1-23

*Look at the following slides. The type of information required of approved training and educational agencies is considerable.*



- Put on overhead 1-24.

Read slide 1-24.



- Put on overhead 1-25.

Read slide 1-25.

*In addition to this information, programs must also provide information about fees and tuition. Considering the amount of data programs will have to report about WIA and Non-WIA clients, what do you think the effect will be?*

Ask participants to discuss the possible ramifications of requiring program operators and particularly schools to report the required data about all students. Ask them to think about it in terms of state colleges, community colleges, and

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adult education.



- Put on overhead 1-26.

*Since the state is required to develop an Eligible Training Provider List, it will naturally be a statewide list.*

Ask participants to think about and discuss the types of problems that might arise from this? Will customers from their area attend schools in different areas? How will payments occur? How do they assure that training received will result in skills that can be used in the local labor market area?

*Let's take a look at WIA Performance Standards and Accountability now.*



- Put on overhead 1-27.

Read slide 1-27



- Put on overhead 1-28.

Read slide 1-28



- Put on overhead 1-29.

*We are not going to go through the formulas for calculating all of the performance standards, however, the Department of Labor has an excellent presentation on this subject. If you decide this is an area where you want additional training, contact your Regional Office.*

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Read slide 1-29.

*In order to determine if a client is working, wages must be found in the base wage file for that person in the quarter after exiting the program. While the calculations of these standards are very similar, Adults and Dislocated workers have individual performance standards.*



- Put on overhead 1-30.

Read slide 1-30.

*While this is basically the same calculation, Adults and Dislocated Workers will have separate 6 Month Retention Rates.*



- Put on overhead 1-31.

Read slide 1-31.

*The base wage file information is always one quarter behind.*

Ask the participants to discuss the implications of this delay on performance management. Ask them to list the issues that will arise and find possible solutions.



- Put on overhead 1-32.

Read slide 1-32.

*Again, this performance standard is the same for Adults and Dislocated Workers but*

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*they are individual performance standards. In these four slides, 8 performance standards have been presented.*

Ask the group to look at the standards and make a list of things they will do differently before they terminate a client from program. What will the follow-up be like and what sort of steps will you take to be sure you capture all data.



Put on overhead 1-33.

Read slide 1-33.

*Performance Standards for Older Youth are primarily concerned with working and look very much like the standards for Adults and Dislocated Workers. Standards for Younger Youth are concerned with skill attainment.*



- Put on overhead 1-34.

*While the calculations for the first three performance standards differ somewhat from the Adult Standards, they measure similar activities. The Credential Rate Standard looks for credentials in post secondary education or advanced training.*

Read slide 1-34.



- Put on overhead 1-35.

*The Skill Attainment Rate measure is used for all in-school and out of school youth who need basic skills, work readiness or occupational skills. A minimum of one goal and a maximum of 3 goals are to be set.*

*The Diploma Rate measures all youth who enter without a diploma and do not continue in school.*

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*The Retention Rate measures those in post secondary, advanced training, employment, the military or apprenticeships six months after exiting program. This measure does not include youth still in school when exiting program.*

*The Informational Measure relates to the skill attainment measure. This measure tracks the percentage of youth who have attained at least one goal.*

*Local Workforce Investment Areas are strongly encouraged to get direct training from the Department of Labor on the Performance Standards. These standards have changed several times since their initial development.*



- Put on overhead 1-36.

Read slide 1-36.

Ask the group to develop a list of questions regarding the Performance Standards. This list should be written and discussed when receiving training from DOL or others on the Performance Standards.

*Let's talk for a few minutes about actions the State has taken. Because so much of the Workforce Investment Act revolves around local control and the Governor's discretion, you will need to be aware of what actions are being taken at the state level.*

(Trainer: Check out the web sites for California and make sure you are up to date on the information they are developing and the actions they are taking. Download information and use as handouts as appropriate. At a minimum, have the minutes of the last State Workforce Investment Board Meeting and any recent policy announcements by EDD.)

Ask the group what information they have received from the state. Have them review the ways it is transmitted to the front line staff and managers.



- Put on overhead 1-37.

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*These are websites that you should be checking out on a regular basis. They will provide the latest information on WIA implementation, interpretation and issues.*