

Workforce Integration Project Interim Qualitative Research Findings

Presentation to Joint ISD and Common Intake Committee

March 19, 2018

Agenda

1. Research Goals
2. Surveys & Focus Groups
3. Key Findings
4. Common Intake Data Elements
5. Potential Tool Chest Items
6. Next Steps
7. Q&A

Research Goals

Research Goals

Conduct system survey and speak with up to 10 informal navigators:

- What data sharing information would:
 - Make their job easier?
 - Lead to better client outcomes?
 - Improve productivity?
- What data-entry and collection workflow patterns could enhance or inhibit common intake?
- What data, tools and/or resources do they use or need to facilitate the informal navigator role (e.g., contact lists, desk aides, etc.)?
- What data about the client would have helped the navigator to quickly identify the client's eligibility for other services

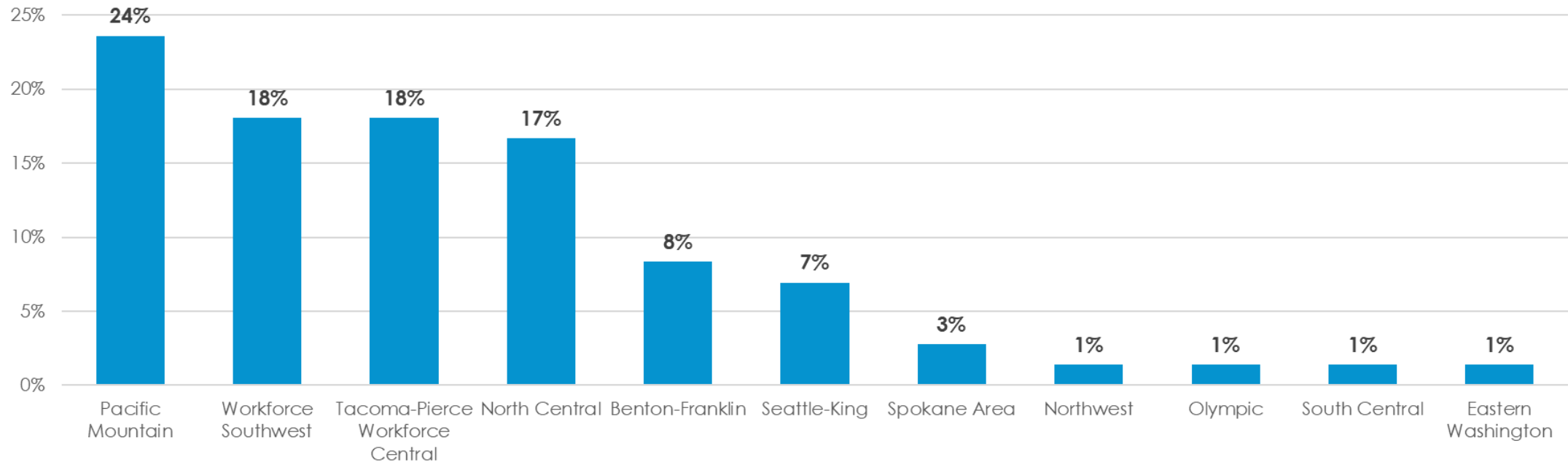
Survey Methodology

- SurveyMonkey online surveys shared via email link
- One survey for colleges and one for WDCs, WorkSource, CBOs and others
- College survey sent to workforce and basic education deans
 - Open from end of January through end of February
- Workforce survey sent to WDC directors via the WWA
 - Open from mid-December through end of February
- All survey recipients were asked to forward the survey link to program and frontline staff broadly within their communities
- Three reminders were sent to each group

Survey Response

Workforce Survey Responses by Workforce Development Area

71 Responses

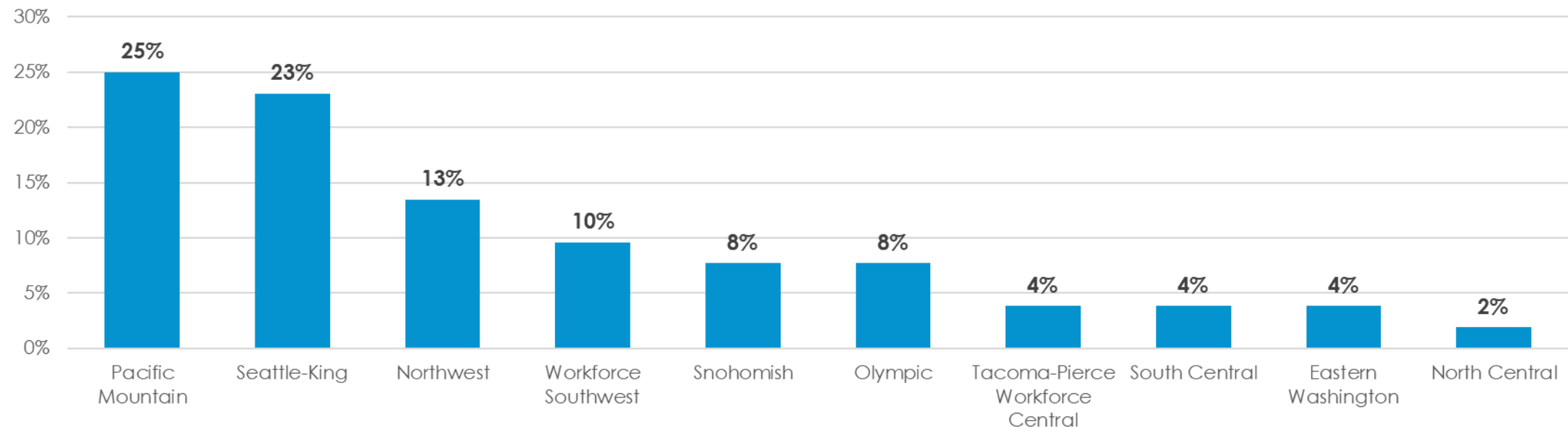


No responses received from Snohomish.

Survey Response

College Survey Responses by Workforce Development Area

52 Responses



No responses received from Spokane Area or Benton-Franklin.

Focus Group Methodology

- Focus Group protocol with 13 questions
- Incorporated input from WTECB, SBCTC and WDC directors
- Identified Spokane and Seattle as focus group sites based on WDC director willingness to assist and innovativeness of WDC efforts
- Asked WDC staff to recruit up to 10 of their best navigators from the local one-stop, college and CBOs
- Held 90 minute focus group at each site
- Each focus group had a facilitator and notetaker and the sessions were also recorded
- Notes were then transcribed and analysis conducted

Focus Group Participants

- 6 participants in Seattle
 - 2 from ESD
 - 3 WIOA contractors
 - 1 representative from a CBO
- 9 participants in Spokane
 - 5 one-stop staff
 - 2 college workforce staff
 - 2 youth center staff

Key Findings

Key Findings

- Programs, services and eligibility criteria change regularly at the local level.
- Local areas want flexibility to allow them to modify data collection fields and formats in order to meet their changing needs.
- Some local areas do not want a common intake form
- The strongest areas of consent with regard to data sharing are:
 - Enrolled services
 - Eligibility algorithms
 - Database of community services
 - UI/jobs-related information

Key Findings

What data sharing information would:

- Make your job easier?
 - Lead to better client outcomes?
 - Improve productivity?
1. Other services the customer/student is receiving
(46% of all survey responses)
 2. The services for which the customer could be eligible
(10% of all survey responses)

"It would be great to have the name and contact information for case managers who refer participants to me."

Other Helpful Data Sharing

Colleges:

- Community Services
- Educational background

Workforce staff:

- Shared case notes
- Labor market data

“It would be nice to have a real time database of what services are available in the community. In real time because grants change owners all the time.”

“SOC Codes for individuals on UI, individual customer employment (Title, SOC, Employer and Industry) and wage data, direct crosswalk for individual training program completion to employment (Title, SOC, Employer and Industry) and wage data. Information on workers/ employers/industries who are at risk due to declining or changing skillsets.”

“The basic services and case notes not being attached make it very difficult to figure out timeline and what has happened.”

Key Findings

What data-entry and collection workflow patterns could inhibit common intake?

1. Data sharing rules

(35% of all survey responses)

2. Other themes:

- Constant pace of change
- Too many siloed processes and staff
- Lack of staff necessary to improve integration and collaboration

“Local areas should be able to input their programs and eligibility criteria and the computer does the eligibility sorting.”

“Grant funding can sometimes vary within and across academic quarters (funds exhausted/additional funds received) as well as student eligibility changes (UI changes, SNAP closed, GPA issues, etc.). Any funding coordination would have to allow for those hiccups and communication of those details.”

Key Findings

What data-entry and collection workflow patterns could facilitate a common intake?

1. Customer inputted common intake
(19% of all responses)
2. Reservations about common intake

"I don't want someone to show up and say, 'I'm eligible for Title 1.' I want them to say, 'I'm ready to take the next step in my career.' Then I can package the resources for them."

"I never ask more than what I need to know. I think it's intrusive."

Key Findings

What data, tools, and/or resources do they use to facilitate the informal navigator role?

1. Collaboration strategies
(21% of all survey responses)
2. Desk aides
(20% of all survey responses)
3. Standalone databases, knowledge management systems
(16% of all survey responses)

“Primarily Salesforce is what we use, but at times the information for customers isn’t added correctly, or isn’t added at all. It also can easily become out of date and forgotten.”

Key Findings

What data, tools, and/or resources do they use to facilitate the informal navigator role?

4. Common enrollment forms
(8% of all survey responses)
5. Improved referral strategies
(8% of all survey responses)

College participants were more likely to mention “standalone databases” (22% compared to 12%) and “common enrollment forms” (16% compared to 3%)

Key Findings

What data, tools, and/or resources do they need to facilitate the informal navigator role?

1. One shared or common data system
(20% of all survey responses)
2. Database of services that the student may need
(28% of all college survey responses)

“A ‘passport’ or ‘roadmap’...some sort of a tool that a job seeker and a WorkSource staff member could use to create an employment plan for each unique customer. We learned through a recent survey of our customers, that while they did receive an overview of WorkSource services from a WorkSource staff member, they don’t understand what that means for them or where to begin.”

“What’s presented to the end-user should be direct, simplistic, easy to understand, and easy to navigate.”

Key Findings

What data, tools, and/or resources do they need to facilitate the informal navigator role?

3. Other themes

- Eligibility tool

(10% of all survey responses)

- Improved self navigation tools
- Common/improved referral system
- Worker retraining and Dislocated Worker staff want to see UI eligibility and decisions

“[A] sharable funding map/tentative funding agreement across workforce funding programs.”

Key Findings

What data about that client would have helped you quickly identify their eligibility for other services? (Focus Group Only)

- Income/family size
- Residence
- Criminal background
- UI status
- Educational background
- Eligibility to work
- Selective service
- UI information (job history)

“Every person’s circumstances is unique; I think access to a thorough navigation/intake interview is the most important initial resource. This illuminates the personal data that will become important to serve the student.”

Observation: The more immersed the participant was in their navigator role, the more difficult this question was to answer

Key Findings

Is there anything else you would like us to know about your local area that would help us understand your area with regard to this project?

- Local areas often still have to document with paper files
- Prefer simple and non-repetitive paperwork
- Some areas have a large number of clients who won't be able to use a customer-driven common intake because they lack technology or English skills
- The common intake should describe services as you would for a customer

Key Findings

Is there anything else you would like us to know about your local area that would help us understand your area with regard to this project?

- Promote local flexibility to collect and manage client information
 - Focus on core information
- Develop systems that allow front-line staff to spend more time with clients and less time on paperwork
- Develop a statewide professional development program

Tool Chest Resources

Tool Chest Resources

Most Requested Tool Chest/Data Sharing Items:

- Eligibility tool that allows local customization
- Community resources database with contact information
 - Use automation to keep it updated
 - Possible 211
- Referral tool so case managers can contact each other
- Sharable participant roadmap/service plan/funding agreement
 - Training funding planner/agreement
- Video-recorded workshops online
- Video-recorded orientations online
- Inter-agency Skype
- Client personal document chest (e.g., birth certificates)

Tool Chest Resources

Other Tool Chest/Data Sharing Items:

- Apprenticeship program database with contact information
- UI Data sharing
- Business services/job match collaboration tool
- Links to military to civilian occupation cross-walks
- Database of employment opportunities for people with criminal backgrounds
- Database of local staff with particular expertise, for example:
 - Case manager with a mental health background
 - Case manager with extensive experience in a particular industry
- Cross-index of of local industry clusters with high demand jobs and training/education services

Common Intake Data Elements

Common Intake Data Findings

- 50 common elements identified
- Some programs are better prepared than others for a common intake
- Various data dictionaries provided by state-level programs are incomplete
- Data conversion between programs will be necessary—some will be easy while others will require the standardization of elements across programs
- Mapping between the intake form question and the corresponding database field is incomplete for most programs—application developers will need to delineate the crosswalk between questions and database fields
- Some intake processes and databases are very complex
- Several databases are not well maintained and have challenging designs
- Some programs and intake processes are currently in flux

Common Intake Data Elements

- First and Last Name
- Maiden Name
- Date of Birth
- Sex
- Marital Status
- Address, City, State, and Zip
- County
- Country
- Phone and Phone Type
- Email
- Residency
- Citizenship
- Race
- Hispanic
- Primary Language
- ELL
- Require Translation
- Basic Skills
- Selective Service
- Veteran
- Active Duty
- Disabled Veteran
- Homeless Veteran
- Highest Education Level
- Highest School Grade
- School Status
- Drop Out
- Employment Status
- Unemployment Status
- Long-Term Unemployed
- Migrant and Seasonal Farmworker
- Homeless
- Disability
- Disability Type
- Ex-Offender
- Low Income
- Public Assistance
- SNAP
- TANF
- SSI/SSDI
- Worker Retraining
- Pregnant or Young Parent
- Single Parent
- Foster Child
- Displaced Homemaker

Next Steps

Next Steps

1. Phone interviews with suburban and rural navigators
2. Data element collection from 5 locally and/or privately funded programs
3. Update data element analysis with local program data
4. Develop draft data element and stakeholder outreach reports
5. Discuss findings with WWA for input
6. Develop two prototype common intake forms
7. Test prototypes
8. Develop draft and final reports including prototype results

Questions?