

Project Name: TAP Implementation Committee on Common Intake Process/Data Sharing

Sponsor: Workforce Training and Education Coordinating Board (Workforce Board)

Project Leaders: David Stillman / Cynthia Wilson

MISSION STATEMENT

Develop an intake process that complies with the Workforce Innovation and Opportunity Act (WIOA) to eliminate redundant assessment and streamlines customer experience.

DEFINITIONS

Intake: Intake is considered the initial point of contact with potential customers. During this time, data is collected that may be redundant across partner agencies. Such redundant information may include:

- Identification
- Demographics
- Socio-economic data as it relates to thresholds of program eligibility

Assessments: Assessments are those diagnostic tools used to determine or refine determinations of program eligibility, workplace readiness, certification, level of attainment of specific skills or training etc.

Consensus: For the purposes of discussions among participants in this committee, this will be the term used for identifying general agreement on topics. Not exclusively majority rule or other quantitative limits of expressed agreement. The vagueness of this definition is necessary as the ideas surrounding common intake evolve and may become more restrictive as the group desires.

BACKGROUND

The WIOA anticipates and emphasizes a seamless integration of partner services that will require substantial strategic, operational, infrastructure, and customer service considerations. The December 9, 2015 DOL statement of what to include in a state plan for WIOA, it explicitly calls for the state to:

... draft policies that will support the implementation of the state's strategies (e.g., co-enrollment policies and universal intake processes).

In addition, Governor Jay Inslee directed the Workforce Training and Education Coordinating Board (Workforce Board) to work with the system's stakeholders to *work together as a single, seamless team.*

To achieve this level of integration, the Workforce Board has commissioned a committee to specifically address the challenges of implementing a common intake process that works for all WIOA partners¹.

The Workforce Board (Board) charged this body to identify which intake data points are standard across most programs, creating a process to store and share that data so it is accessible to all partners and facilitates integrated service delivery.

Strategic Link with TAP

This charge from the Workforce Board is in direct response to the following strategic goal stated in the Board-adopted state plan Talent and Prosperity for All (TAP).

- *Develop an intake process that eliminates redundant assessments and streamlines customer experience.*

The plan goes on to describe what the achievement of this goal would look like operationally:

- *A critical goal of integrated service delivery is to provide customers a streamlined intake process that quickly connects them to relevant services . . . , but the customer should not be bombarded with duplicative requests for information or skills assessments.*

In accomplishing these ends the specific business drivers for this committee include:

- WIOA 101(d): duties of the state board (referring to requirement for common intake)
- Support all aspects of the TAP
- Accurate reliable data is collected and reported
- Benefits the staff by cross sharing information
- Improve the system so that clients a positive experience
- Clients receive the support services needed to successfully reach their goal
- Program outcomes are met/improved/assessed
- Eliminate redundant data
- Increasing program participation by seeing an increase in the number of co-enrollments across multiple programs.

Goals Tied to Strategic Priority

The goal of this committee tied to the above strategic priority is to eliminate redundant assessments, data taken at intake and streamline the customer's experience.

¹ We will be considering intake of all Combined Plan WIOA partners. For a list of Combined Plan participants and contacts in the development of the TAP, Please see Attachment 1.

SCOPE OF COMMITTEE WORK

The Common Intake and Data Sharing Committee will make recommendations to the Workforce Board and TAP partners for creating a common intake process that eliminates requests for the same information by each TAP program and agency a customer is referred to.

Steps to developing this process include (but are not limited to):

- Identify all partner intake process and inventory questions to determine areas where we collect the same data
- Develop proposals for data sharing (present to Data Sharing committee)
- Determine standard assessments for the system, i.e. basic skills, mental health, disability, etc.
- Research opportunities for building upon existing portals and data warehouses for data sharing and potential electronic common intake, including WA Connection, WorkSource WA, etc. (share learning with Data Sharing committee)
- Develop guiding principles that define a positive customer experience
- Research external data collection/sharing systems for best practices

SCHEDULE

MILESTONE	START DATE	FINISH DATE
Adopt project charter	08-15-2016	11-2-2016
Expand membership to include WIOA non-core partner programs	08-15-2016	12-15-2016
Reach consensus on operating definitions	09-30-2016	12-15-2017
Develop a general needs assessment as it relates TAP Partners and their intake process; to establish scope of work for contractor knowledge	09-12-2016	01-24-2017
DRAFT a TAP Acceleration Grant with the following scope of work: <ul style="list-style-type: none"> • Identify data transfer, security, and protocol issues and constraints • Identify service agreements needed across programs/partners • Draft recommendations, including key stakeholder input as needed 	3-2017	4-2017
Hire Contractor	6-2017	1-2018
Review preliminary findings from contractor	1-2018	2-2018
Return to contractor for final revisions	2-2018	4-2018
Review final findings and recommendations	5-2018	7-2018
Determine Next Steps	8-2018	TBD
Finalize recommendations	TBD	TBD
Deliver recommendations to Board (via Interagency Committee)	TBD	TBD
Recommendations adopted by Board	TBD	TBD

MILESTONES Without Grant	START DATE	FINISH DATE
Adopt project charter	08-15-2016	11-2-2016
Expand membership to include WIOA non-core partner programs	08-15-2016	12-15-2016
Reach consensus on operating definitions	09-30-2016	12-15-2017
Collect TAP partners intake documents	3-17-2017	5-2017
Assess intake documents to determine what common element exists	5-2017	7-2017
Determine any restrictions on data sharing etc. <ul style="list-style-type: none"> Identify data transfer, security, and protocol issues and constraints Identify service agreements needed across programs/partners Draft recommendations, including key stakeholder input as needed CONCERN: Does the committee even have the capacity to do the above.	5-2017	11-2017
Outline scope of project to determine what vender/system could be used/developed to meet the defined need	11-2017	3-2018
Identify vender/system to contract with	3-2018	6-2018
Contract with vender/system	6-2018	8-2018
Review preliminary findings from vendor	2-2019	4-2019
Return to vendor for final revisions	4-2019	8-2019
Pilot with vendor/partner	8-2019	10-2019
Determine Next Steps	10-2019	2-2020
Finalize recommendations	TBD	TBD
Deliver recommendations to Board (via Interagency Committee)	TBD	TBD
Recommendations adopted by Board at January regular meeting	TBD	TBD

OUTCOMES AND MEASURE

OUTCOMES	MEASURES OF SUCCESS
Reduce number of repetitive data entry by client and staff	To be determined
Increase number of program participants	Number of referrals and multiple program enrollments
Reduce the number of questions related to program eligibility for inter-program referrals	Number of referrals and multiple program enrollments. Reduced time-to-enrollment.
Increase number of cross-program referrals	To be determined once common exit dates are implemented

RELATIONSHIP TO END GOAL

How does the work of this committee relate to the end goals:

- Help more people find and keep jobs that lead to economic self-sufficiency with a focus on disadvantaged populations.
- Engage more people and sustain their positions.
- Close skill gaps for employers, with a focus on in-demand industry sectors and occupations.
- To work together as a single, seamless team to make this happen.

The work of the Common Intake and data sharing implementation committee targets the third of the above challenges set forth by Governor Jay Inslee in his letter assigning WIOA implementation to the Workforce Board on October 27, 2014.

A common intake process facilitates the first two of these goals by creating a single, seamless intake process by presenting ourselves to our customers as a single, seamless team.

COMMITTEE MEMBERSHIP ROLES AND RESPONSIBILITIES

ROLE	RESPONSIBILITY/AUTHORITY
Committee Lead	<ul style="list-style-type: none"> • Facilitate Committee meetings • Work with staff to development agendas and work plans • Represent committee activities to the Workforce Board • Facilitate strategies for committee recommendations • Create and assign leadership for needed taskforces/small groups
Committee Staff	<ul style="list-style-type: none"> • Assist Lead in development of agenda • Assist in meeting facilitation, as requested • Develop and provide support materials, as appropriate • Represent Committee, as appropriate or requested
Committee Participants	<ul style="list-style-type: none"> • Defines project vision, goals and objectives • Commit to mission • Represent your organization/administration • Brings information back to your organization • Advocate for the groups mission • Approves charter • Accepts key project deliverables • Champions the project and its priority within the department • Represents their business area • Participates in project activities • Reviews deliverables as assigned • Attends monthly meetings • Look for opportunities and initiatives that support the mission

CONSTRAINTS AND DEPENDENCIES

- Ability to develop shared technology
- Information is collected in a consistent manner
- Person(s) collecting the information or the interface if done electronically
- Regulatory constraints and requirements

GOVERNANCE AND GUIDING PRINCIPLE

- All TAP partners have equal representation
- Clients/customer experience is positive/productive/focused
- Consensus
- Decisions should never have to wait for a meeting. If communications are flagged as urgent, we all agree to respond within 48 hours.
- We all assume that all partners are acting with good intent but may not fully understand one-another's processes.
- The long term impacts of our actions will be a primary focus of the strategies we define.

COMMITTEE MEMBERSHIP

Executive Lead: David Stillman and Cynthia Wilson

Staff Support: Rebecca Reule/ Dave Wallace

Committee Members	Organizations
Babs Roberts	DSHS
Cindy Wilson (Co-Chair)	SBCTC
Clyde Brown	Rural Resources (CBO)
David Stillman (Co-Chair)	DSHS
Debbie Scott-McFarlane	Western Washington Indian & Employment Training
Diane Smith	Grays Harbor College
Don Kay	DSHS/DVR
Elise Rowe	ESD
Ellen Nolan	DSHS
Erin Frasier	SBCTC/Workforce Ed
Freda Cogger	United Way
Gary Kamimura	ESD
Jenni Fleming	ESD
Kay Neill	WDC-Sea-King
Kelli Bloomstrom	Centralia College
LaTanya Huey	Workforce Central
Lori Pfingst	DSHS
Louisa Erickson	DSHS
Louisa Mora	OIC
Malinda Bjaaland	Northwest WDC
Marissa Cahill	Northwest WDC
Martha Guerra	OIC
Melissa Ford-Shah	DSHS
Melodie Pazolt	DSHS
Mieko Gray	Pacific Mountain WDC
Patrick Dymond	DSB
Tim Robison	Spokane Area WDC