Customer Service Training Plan Framework

GOAL: Develop a disability-inclusive Workforce Innovation and Opportunity Act (WIOA) cross-partner training plan framework with an emphasis on customer service, effective delivery of service, and ability to increase capacity across staff.

A number of provisions in WIOA emphasize and increase the requirements for the general workforce development system and the One-Stop Centers to meet the needs of job seekers with disabilities, increase their access to high-quality workforce services, and prepare them for competitive integrated employment leading to economic self-sufficiency. In order to ensure that individuals with disabilities experience seamless customer service across WIOA partner programs, partner staff should be equipped with the knowledge, skills, and abilities needed to provide quality services to customers who have disabilities.

Purpose

The purpose of this document is to provide a framework for WIOA partner programs to use when developing and implementing cross-partner training programs. It is important to develop a coordinated plan that includes all levels of agency participation and takes into consideration all training facets. This training plan framework is intended to include staff representatives from leadership, management and direct service delivery within all partner programs. All trainings should allow for relationship building, helping partners to move toward integration of service delivery to meet the needs of customers.

This framework outlines the objectives, needs, strategies, and curriculum content to be addressed when training WIOA partner programs to provide seamless customer service, including those with disabilities. The plan presents the considerations needed to support the development of training materials, evaluation of staff knowledge, planning for training needs, creating training outlines and other training-related tasks.

Training Development

Approach Used to Develop the Framework

As part of the Employment and Training Administration's (ETA) Disability and Employment Cohort that is focused on Customer Service, six states (Indiana, Iowa, Minnesota, Missouri, Nebraska and Oklahoma) participated in a series of meetings to share resources, challenges, and innovative solutions. At the conclusion of this six-month process, the states collectively identified resources to develop that will help improve seamless customer service within a state. As a first step, the cohort developed a self-assessment tool, which states can use to identify current levels of knowledge and understanding and highlight gaps where more training is needed.

To complement this self-assessment, each state shared its current best practices in developing processes, outlines, and materials for cross-partner training. This document highlights the best thoughts and strategies identified by the cohort. It can be used to provide a baseline framework that can be customized to meet a state's need to develop disability-inclusive cross-partner training.

Skills and Needs of Staff/Office

Approaching a cross-partner training requires buy-in and participation from all WIOA partner programs. A leadership group of cross agency representation (i.e., the core partner group that supports the development of the WIOA Unified or Combined state plan) should be formed – if you do not already have one in place. This core group, which should include leadership from all the WIOA titles and programs as well as staff dedicated to support professional development and training needs, can use the results of the self-assessment to collectively identify training topics and develop a disability-inclusive training plan.

Leadership support and the development of a training plan framework work best when there is joint effort and a clear vision for how the training can provide positive outcomes across all partners. A team-based approach will ensure equal participation of partner staff and awareness so that unique needs are considered.

Listed below are some key considerations for the leadership team or workgroup to keep in mind when developing this training. Identifying these components (for available resources and limitations) at the onset of training development will help your team to organize more quickly.

- ◇ Complete the cross-partner staff self-assessment.
- ◇ Define staff training needs / requirements, based on results of self-assessment.
- ◇ Review customer satisfaction surveys to identify additional training needs.
- ◇ Training Tools & Environment:
  - ◆ Media
  - ◆ Formats
  - ◆ Training settings
  - ◆ Delivery styles
- ◇ Determine what is needed in our One-Stop Center today (accommodations/resources/adaptive technology).
- ◇ Determine what resources can be accessed through partners (accommodations/resources/technology).
- ◇ Assign subject matter experts who can help develop and/or facilitate training.
- ◇ Research what to procure / technology to learn to better serve customers.

Program Delivery

Listed below are some key considerations for the leadership team or workgroup to keep in mind when delivering training. Identifying these aspects (for available resources and limitations) at the onset of training development will help your team to organize more quickly.

- ◇ Purpose of Project:
  - ◆ The workforce delivery system will establish a cross-partner training plan with emphasis on customer service, effective delivery of service, and ability to increase capacity across staff.
- ◇ Objectives: What Do We Hope to Accomplish?
  - ◆ The One-Stop Center will work across partners to identify and reduce barriers to accessible, seamless and integrated services for individuals with disabilities.
  - ◆ The building of mutually beneficial partnerships across One-Stop Center Staff to increase opportunities for individuals with disabilities to become employed in integrated and competitive environments.
  - ◆ Increased comfort and competence of One-Stop Center staff and partner programs in the provision of services to individuals with disabilities.
  - ◆ Other objectives customized to your needs.
- ◇ Delivery Timeline
  - ◆ Agency timelines, staff requirements, staff time for customer services provision vs. training/meetings.
- ◇ Who to Include in the Training
  - ◆ New Staff – within first month of new hire.
  - ◆ Current Staff – annual survey followed up by needed training topics.
  - ◆ Annual trainings of new topics.
  - ◆ Interactive, hands-on learning provided in-person as often as possible.
  - ◆ Are trainings made available for staff to access when needed?
  - ◆ Repeat trainings every two years.
- ◇ Platforms: How will the Trainings be Delivered
  - ◆ In-person trainings – annual based on training topic needs in each regional office, reviewed as a group.
  - ◆ Webinars – within first month of new hire, reviewed individually with supervisor.
  - ◆ Training Sites.
- ◇ Mediums: In What Formats/Mediums are Materials Available
  - ◆ Available in print, large print, electronic, Braille, audio.
  - ◆ Ensure all materials being used and provided are available to all staff at the same time.

Training Database

Listed below are some key considerations for the leadership team or workgroup to consider when building a training database. Identifying these aspects (for available resources and limitations) at the onset of training development will help your team to organize more quickly.

◇ Identify where information will be used, stored and accessed.
◇ Each state will need to have contact(s) identified for storage of materials/content.
  ◆ Determine if storing materials on a national database is an available option.

Evaluation

Some key considerations for the leadership team or workgroup to keep in mind when defining an evaluation method are listed below. Identifying these aspects (for available resources and limitations) at the onset of training development will help your team to organize more quickly.

◇ Ensure understanding and learning; develop future training topic needs. Are the following required?
  ◆ Pre-survey to understand current knowledge.
  ◆ Post-survey to measure impact, future topics, change strategies, as needed.
  ◆ State-customized certification for individuals completing the initial and ongoing training.
  ◆ State considerations: Who is responsible for delivery and review?

Training Resources

Training Administration

Discussion on requirements and tracking – where things are stored, record keeping, progress reporting, procedures for monitoring training.

Resources and Facilities

Discussion on training facility requirements and resources for effective delivery – do needs include booking a classroom, special equipment, visual aids, assistance with accessible formats, etc.

Schedules

Discussion related to responsibilities – who is doing what, who is creating materials, pulling handouts together, ensuring access to all staff, etc.

Post-Training Resources

Discussion on what needs to be available between or after trainings so that staff members have access/can review.

◇ Disability Resource Guides.
◇ Partner Program Guides.
◇ Resource List and Explanations.

Future Training

Discussion regarding how training will be evaluated and/or how updates will be made.

Training Curriculum

What pieces need to be included to ensure our customers are welcomed and served in each of our offices? What pieces were key as you consider serving customers with disabilities?

Current list of training areas:
- ◇ WIOA
- ◇ Title I, II, III, IV (General and Agency for Blind, if two)
- ◇ Required partner programs (Job Corps, SCSEP, Youth Build, etc.)
- ◇ ADA
- ◇ Integrated Resource Team
- ◇ Section 188
- ◇ Universal Access
- ◇ Career Development
- ◇ Motivational Interviewing
- ◇ Serving customers with disabilities
  - ◆ Process for providing accommodations
  - ◆ Disability Etiquette
  - ◆ Disability Rights
  - ◆ Disability Disclosure
  - ◆ Co-enrollment across multiple partners
  - ◆ Benefits Planning
  - ◆ Supported Employment/Customized Employment
  - ◆ Cultural Considerations
- ◇ Disability Specific Trainings – Serving customers effectively who are/have:
  - ◆ Deaf or Hard of Hearing
  - ◆ Blind or Low Vision
  - ◆ Physical Disability
  - ◆ Traumatic Brain Injury
  - ◆ Learning Disability
  - ◆ Intellectual and other Developmental Disabilities
  - ◆ Mental/Behavioral Health
- ◇ Accommodation Specific Trainings
  - ◆ Sign Language Interpreters
  - ◆ Assistive Technology
  - ◆ Screen Reading Software
  - ◆ Service Animals
  - ◆ Creating accessible materials
  - ◆ Video Remote Interpreting

◇ Resources
- ◆ Job Accommodation Network (JAN)
- ◆ Regional Americans with Disabilities Act (ADA) Centers
- ◆ Centers for Independent Living
- ◆ WorkforceGPS Disability and Employment Community of Practice
- ◆ Others

◇ Business Development
- ◆ Disability Focus Tax Incentives – Employers and Individuals with Disabilities
  - ◆ Work Opportunity Tax Credit
  - ◆ Architectural and Transportation Barrier Removal Deduction
- ◆ State Employer Tax Incentives
- ◆ Section 503 of the Rehabilitation Act
- ◆ Section 188 of WIOA (Nondiscrimination and Equal Opportunity)
- ◆ Work Incentives
- ◆ Job Analysis
- ◆ Services to employers

NOTE: Discussions revealed that WIOA rules and program information should not take away from our focus. Many cohort members agreed that we are still working in silos in many areas and need to build relationships across core partners.

Some training content will need to be created locally/within the state.