TAA Community - CHAT TRANSCRIPT – *Thread Format*

<table>
<thead>
<tr>
<th>Title</th>
<th>TAA Final Rule: Trade at the One-Stop - Scheduled Chat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>12/16/2020</td>
</tr>
<tr>
<td>Start Time</td>
<td>01:00 PM GMT-05:00</td>
</tr>
<tr>
<td>End Time</td>
<td>02:04 PM GMT-05:00</td>
</tr>
<tr>
<td>Moderator</td>
<td>Theberge, Timothy</td>
</tr>
</tbody>
</table>

*Theberge, Timothy*  1:00 PM:  
We'll wait another minute or two to let everyone join.  

As a reminder, unlike our webinars, you don't need to introduce yourself via the chat.  

Also, this is a chat only environment, there is no audio.  

*Theberge, Timothy*  1:02 PM:  
Welcome to our 8th scheduled chat - our last for 2020! The purpose of this forum is to provide an opportunity to share with your peers on challenges and solutions in the effective operation of the TAA Program. Today’s topic is TAA at the One-Stop.  

*Theberge, Timothy*  1:03 PM:  
A couple of ground rules to support multiple conversations occurring at the same time. If you’re responding directly to individual comments or questions, please reference the person in question by using an @ sign and then their first name.  

*Theberge, Timothy*  1:03 PM:  
So, for example, if Beth from MA wanted to ask about states or locals are redesigning their customer flow, it would be helpful if she started off like this:  

Customer flow – [Question or statement goes here.]  

Then you can reply to Beth like this:  

@Beth - [Answer or follow-up goes here]  

*Theberge, Timothy*  1:04 PM:  
As a reminder, we will be issuing a transcript of this chat to the state coordinators. To request a copy, please email taa.cop@dol.gov. The contents of this chat should be considered technical assistance and not official guidance of the Department.  

*Theberge, Timothy*  1:04 PM:  
Also, there are several reference documents that will be helpful for this topic. All the links will be in the transcript.
Theberge, Timothy - 1:05 PM:
Final Rule: https://www.govinfo.gov/content/pkg/FR-2020-08-21/pdf/2020-13802.pdf


Theberge, Timothy - 1:05 PM:
So, with that: Trade at the One-Stop. Operating Costs, Infrastructure Costs, Integration of Services, Trade and the Local Boards, etc.

Mendez, Juan - 1:08 PM:
Now that comprehensive assessments are not mandatory, the initial assessment is more important than ever, which tools are being used for those participants who are on the fence with education [and] or experience before approving a training program.

Theberge, Timothy - 1:11 PM:
@Juan - We did a session on Assessments last week. Did you catch that one?

Mendez, Juan - 1:12 PM:
@ Tim Yes, I just want to get a feel for what is being used by other states.

Pelletier, Judy - 1:11 PM:
@Juan, we are using WOW! and Accuplacer

Mendez, Juan - 1:13 PM:
@Judy, Thank You!

Sanders, krystal - 1:08 PM:
Any best practices that anyone can share on how they accomplish integration of services

Theberge, Timothy - 1:11 PM:
@Krystal - We did a webinar and a chat on integrated services. Not sure they were as detailed as they could have been, but I would take a look at those.

Sanders, krystal - 1:11 PM:
@Tim thanks

Cuvelier, Michelle - 1:21 PM:
@krystal Allowing TAA staff and WIOA staff time to build relationships and learn from each other.

Sanders, krystal - 1:23 PM:
@Michelle Thanks
Grant, Kelli- 1:08 PM:
@everyone, has anyone spoken or presented to the local boards in their areas about integration or coenrollment?

Reichert, Janet- 1:20 PM:
@Kelli on the local boards in their areas about integration or co-enrollment question. Ohio has spoken with the local boards with a favorable response. We still have more work to do on this, but it's encouraging.

Grant, Kelli- 1:21 PM:
@Janet, did TAA have a good rapport with the local boards prior to the final rule?

Reichert, Janet- 1:23 PM:
@Kelli...yes and no...depended on the area.

Huhmann, Myra- 1:11 PM:
I'm interested in USDOL's TEGL 03-20 and the best use of the initial assessment and employment and case management services to get clients back to work quickly with short term or no classroom training. @Tim Theberge, is this a push to work based learning

Theberge, Timothy- 1:12 PM:
@Myra - We have always preferred work-based learning models since the participant would be employed while in training. The TEGL didn't prioritize that, it just reminded the system of the determinations that need to be made before a participant is enrolled in training.

Huhmann, Myra- 1:13 PM:
@Tim - thank you

Story, Christy- 1:12 PM:
customer flow- Has anyone modified or changed customer flow? What are your best practices?

Del Rosario, Alexandra- 1:13 PM:
Co-Enrollment: can any one share their process for Co-Enrollment? And who manages the WIOA part after the participant is enrolled?

Waters, Jhansi- 1:15 PM:
@Alexandra - in PA, preCOVID, it was a handoff. TAA staff would refer the participant to the WIOA case manager in the office - schedule an appointment.

Story, Christy- 1:19 PM:
@Jhansi- Missouri has some LWDB's that utilize the same process and other LWDB's allow state staff to do both WIOA and TAA enrollments

Waters, Jhansi- 1:21 PM:
@Christy, thank you.

Waters, Jhansi- 1:23 PM:
@Christy - was this possible through a train the trainer model,. One train all TAA staff?
Story, Christy - 1:28 PM:
@Jhansi - I am not sure I can answer your question fully. Some of the regions LWDB’s have utilized a practice of allowing state staff to co-enroll in WIOA, while other regions LWDB's do not allow that practice. I am unsure of when the WIOA enrollment training occurred in those regions or who performed the training.

Waters, Jhansi - 1:30 PM:
@Christy - that's helpful. Ty.

Story, Christy - 1:33 PM:
@Jhansi - You are welcome.

Waters, Jhansi - 1:15 PM:
@Alexandra - not seamless, but participant has two folders WIOA and TAA.

Theberge, Timothy - 1:16 PM:
@Jhansi - Is there a shared MIS?

Waters, Jhansi - 1:16 PM:
@Tim, yes shared Case Management system

Del Rosario, Alexandra - 1:17 PM:
@Jhansi Thanks

Garza, Janice - 1:14 PM:
@anyone - How are you planning to utilize staffing flexibilities? Are there any concerns about changing what has been done for trade in your state?

Huhmann, Myra - 1:15 PM:
@Janice - Missouri's management is still in the decision phase.

Theberge, Timothy - 1:15 PM:
@All - Staff Flexibility - Remember that it is optional and can vary from local to local, office to office. It does not need to be an all or nothing approach.

Huhmann, Myra - 1:24 PM:
@Tim - it's confusing b/c if we go with staff flexibilities, co-enroll could fall under this and be charged to TAA Case Management. That was just my thinking.

Huhmann, Myra - 1:25 PM:
@Tim - I know, not before certification

Theberge, Timothy - 1:26 PM:
@Myra - I'm not sure what you mean. Co-enrollment is to provide access to services that TAA cannot provide - notably supportive services and follow up. Those costs are unallowable under Trade. But yes, WIOA staff serving TAA participants could charge time to TAA for counseling, assessments, etc.
Huhmann, Myra- 1:26 PM:
@Tim - I’m thinking about if they provided part of the initial assessment or help with the TAA employment / case management services. Getting my wires crossed.

Theberge, Timothy- 1:27 PM:
@Myra - Exactly, if they did those services after a certification and eligibility determination, that time could be charged to TAA.

Theberge, Timothy- 1:18 PM:
@All - Is TAA paying for infrastructure costs in any of your states?

Grant, Kelli- 1:19 PM:
@Tim, yes

Allen, Juliet- 1:20 PM:
@ Tim Yes in KY

Huhmann, Myra- 1:20 PM:
@Tim - yes

Huhmann, Myra- 1:22 PM:
@Tim - During yesterday discussion about TAA case management funds, if lean six sigma were applied to the whole co-enrollment process, would TAA funds be used to cover any WIOA involvement in the processed (if a consultant/coach was hired)?

Theberge, Timothy- 1:23 PM:
@Myra - Good question. I suppose the majority of the costs could be covered by Trade, but there is also a benefit to the WIOA program, so there should be some shared cost.

Garza, Janice- 1:24 PM:
@tim would the cost be proportional?

Theberge, Timothy- 1:28 PM:
@Myra - Please send Jason Hudson an email about the six sigma question. It’s worth a targeted discussion.

Theberge, Timothy- 1:32 PM:
As a reminder, the Regional Office and OTAA are always willing to facilitate state-specific technical assistance on things like co-enrollment, customer flow, etc. And, ideally, we’d love for you to find another state/local that has had success in the area you are targeting, since peer to peer TA is always the most effective.

Del Rosario, Alexandra- 1:33 PM:
@Tim Thanks
Huhmann, Myra - 1:34 PM:
@everyone - how do you notify WIOA about petition filings so they can provide Career Services? I want to see if there is a more effective way than what Missouri is doing.

Reichert, Janet - 1:36 PM:
@Myra....how is MO doing it?

Huhmann, Myra - 1:38 PM:
@Janet - right now, I notify the WIOA Coordinator who is in Central Office with me, we also maintain a petition log with the status of pending, certified, denied, and terminated petitions that is sent out to the WDB Directors monthly, and we are contemplating sending out a petition memo notice to the WDB Directors when a petition is filed.

Reichert, Janet - 1:37 PM:
@Myra, Ohio has the contact personnel for the local offices and WIOA on the distribution list for any filed or certified petitions.

Grant, Kelli - 1:38 PM:
@Myra, I am an adjunct member of the RR team in SC that includes state RR staff and WIOA staff. There is really no formal way....Once the petition is certified we send a formal email notification to several stakeholders, to include local areas. I am interested in how everyone is doing it, always looking for a better process!

Garza, Janice - 1:39 PM:
@Myra in Arizona we are going to get our TAA State Coordinator synced up with our Employer Engagement Administration so their regional coordinators can include TAA

Theberge, Timothy - 1:41 PM:
@Janice - Connecting with the Business Services / Employment Engagement folks is key.

Reichert, Janet - 1:40 PM:
@Myra, the petition memo notice works well for Ohio.

Theberge, Timothy - 1:41 PM:
As a reminder - The requirement is for appropriate career services to be provided when the petition is filed.

Pelletier, Judy - 1:41 PM:
@Myra I am a member of Business Engagement and coordinator of Rapid Response. So I announce them through those groups but we also have a new group which meets monthly of service providers and WIOA Board Directors for which I do updates on trade.

Waters, Jhansi - 1:41 PM:
@Tim, would you suggest a 'co-enrollment' state policy or an 'integrated services' state policy?

Theberge, Timothy - 1:42 PM:
@Jhansi - Depends on how broad an integrated services policy you are talking about. Only WIOA and TAA? The wider partner network?

https://taa.workforcegps.org
Includes minor edits for spelling, formatting, etc. No substantive additions or deletions have been made.
Reichert, Janet- 1:43 PM:
@Jhansi: Ohio is updating our WIOA policy to include the required co-enrollment and citing the new regulations.

Theberge, Timothy- 1:43 PM:
You should probably have a specific policy on co-enrollment that covered the mechanics of who does what. An integrated services policy is far more involved.

Marquez Rios, Mayra- 1:43 PM:
TN is finalizing a Co-enrollment policy based on Final Regulation + TEGL- 4-20. Training on the policy and TA will be offered to all state staff including AJC Team Leads, OSOs and LWDB.

Waters, Jhansi- 1:43 PM:
@Tim and Janet, ok...makes sense

Pelletier, Judy- 1:45 PM:
@Jhansi Maine issued a Co enrollment policy w/ WIOA and Trade but I also needed to identify a process w/ the local service providers which I negotiated w/ one. I then ran it by the two others and we came to a statewide agreement which I will issue in a State Trade Policy letter.

Waters, Jhansi- 1:49 PM:
@Judy - that's interesting, would it be okay for us to reach out to you?

Pelletier, Judy- 1:50 PM:
@jhansi Yes

Theberge, Timothy- 1:51 PM:
:) Every time a state peer-to-peer agreement is reached, an angel gets its wings.

Garza, Janice- 1:44 PM:
@Tim what about the requirement to actively seek out workers to assist with filing a petition. How does that fit into the appropriate career services requirement you mentioned?

Theberge, Timothy- 1:45 PM:
@Janice - That's a different requirement. Whether that outreach is done by Rapid Response or TAA staff specifically is up to the state, but that is to be an ongoing process.

Garza, Janice- 1:46 PM:
@tim- I see.

Theberge, Timothy- 1:46 PM:
@Janice - The state is responsible to ensure that someone is seeking out groups of workers that are likely eligible and assisting them in filing petitions. Whether that is RR or TAA doesn't matter. As long as someone [does] it. It could even be the employer engagement / business services folks. We don't require the WHO, only the WHAT.

https://taa.workforcegps.org
Includes minor edits for spelling, formatting, etc. No substantive additions or deletions have been made.
Theberge, Timothy - 1:52 PM:
How can we help you engage the locals?

Huhmann, Myra - 1:53 PM:
@Tim - $

Theberge, Timothy - 1:53 PM:
@Myra - So, if TAA didn't exist, they would have to serve these folks anyway. And, frankly, their enrollment numbers are miserably low - in general.

Huhmann, Myra - 1:54 PM:
@Tim - I know but TAA $ makes it a little sweeter. They still think that TAA workers ruin their performance

Theberge, Timothy - 1:54 PM:
TAA is covering training, case management - all we are asking for is supportive services every now and then.

Garza, Janice - 1:54 PM:
@Tim start telling them we will pay proportionate costs to have their DW worker staff cross trained- then actually do it!

Theberge, Timothy - 1:54 PM:
@Janice - Yes. Training of partner staff is allowable.

Del Rosario, Alexandra - 1:55 PM:
@Janice exactly thats the mentality I encounter every time I ask

Pelletier, Judy - 1:54 PM:
@Tim, I found that you can talk at the top all you want but it comes down to who is doing what when and do they talk locally.

Theberge, Timothy - 1:57 PM:
@Judy - For sure. It's always local.

Grant, Kelli - 1:55 PM:
@Tim, our WIOA program enacted a 30% participant cost rate policy a few years ago, it has traditionally been a big hindrance to coenrollment - Why enroll when they 'cant' spend any money on them

Theberge, Timothy - 1:55 PM:
@Kelli - 30% on what? Training?

Grant, Kelli - 1:57 PM:
@Tim, I would have to go back and read it again, but I believe it is over all, they must spend at least 30% on participants? Something like that. When TAA funds everything except for support services, which traditionally WIOA doesn't have the money for, they see TAA participants as bringing their participant to cost rates down....does that make sense?
Theberge, Timothy - 1:58 PM:
@Kelli - I think so. I guess I would be more impressed by a system that served more people and still got good outcomes.

Grant, Kelli - 1:59 PM:
@Tim, agreed, but it has been one of the top reasons used for WIOA not enrolling TAA

Theberge, Timothy - 1:57 PM:
Ok. So we are coming up against 2pm.

Theberge, Timothy - 1:57 PM:
Thank you all for joining us. We hope these chats are helpful. They provide us some great insight to what issues you are dealing with and what topics you need to hear from us and your peers on.

Theberge, Timothy - 1:58 PM:
This chat marks the end of Phase II of our TAA Final Rule technical assistance. We’ll be back after the New Year with at least 6 additional webinars and several more scheduled chats. Please let us know what you would like us to cover.

Theberge, Timothy - 1:58 PM:
And, as always, make sure to check out the resources and other items available at: https://taa.workforcegps.org

Theberge, Timothy - 2:00 PM:
The transcript of this session will be made available in the next day or two. The transcript is sent to our state contact distribution list. To request a copy, please email TAA.cop@dol.gov.

Marquez Rios, Mayra - 2:00 PM:
Thanks! happy Holidays All

Cork, Marlana - 2:00 PM:
Thank you! Happy Holidays!

Theberge, Timothy - 2:02 PM:
Also, please send us an email with any additional topic or follow-up sessions you would like us to cover in 2021.