**WorkforceGPS**

**Transcript of Webinar**

**2018 WIOA Co-Enrollment Cohort - Lessons Learned**

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LAURA CASERTANO: Again, I want to welcome everyone to today's WIOA Co-Enrollment Cohort webinar and I'm going to turn things over to your moderator today, Shelia Lewis. She's a workforce analyst with the Employment and Training Administration for the U.S. Department of Labor. Shelia, take it away.

SHELIA LEWIS: Thank you, Laura, and welcome everyone. Thank you for attending today's event. Today we have a lot of material to cover, so we'll start right into it.

But first, let's review our poll question. So hopefully, everyone has had a chance to complete the poll question. I want to go over the results. It looks like we have – most people consider their states at an intermediate level. I see there are a few people who are still completing the poll. So I'll give you a few more seconds to complete the poll question. But it looks like we have four experts. Most people, it seems like they're, either they're not sure where their states are and they're either at their – either they're not sure or they're at an intermediate level. So let's see where you think you might be by the end of today's event.

So we'll move on and I'll begin introducing our state panelist team. Panelist, I'm sorry, for our state teams. Each state is represented by one or two people from the total team, so right now I'll introduce our California team, beginning with Loren Shimanek. He is the senior evaluation performance specialist at the California Workforce Development board. And Jennifer Hernandez, who is an associate secretary at the California Labor and Workforce Development Agency.

Next slide. And from the District of Columbia, your panelist is Michelle Johnson. She is the state director of adult and family services, Title II.

From Kentucky, your panelists are Natalie Cummins, who's associate, administration and accountability of Kentucky Skills U, Kentucky Council on Postsecondary Education. And Holly Hendricks. She's the acting director of program services, Kentucky Office of Vocational Rehabilitation.

And from New Jersey, we have Joseph Dombrowski, who's the assistant director at the New Jersey Department of Labor and Workforce Development Employment Services. And John Bicica. He's the chief at the New Jersey Department of Labor and Workforce Development, Workforce Development Board, Coordination and Support.

And your panelists from Massachusetts are Sacha Stadhard. She's the grant management specialist from the Department of Career Services. And Olga Yulikova. She's the state director of Senior Community Services Employment Services, Massachusetts Executive Office of Elder Affairs.

And the Pennsylvania team panelists include Allison Jones. She's the director of Pennsylvania Workforce Development Board. And KayLynn Hamilton, the Workforce Development Specialist at Penn State University Institute for the Study of Adult Literacy.

And that concludes our list of panelists for today. And now I'll move right into our objectives for today. I will host the first part of this presentation and we'll review the cohort, the co-enrollment cohort introduction, background and structure. And then your panelists – we'll have a panel discussion where your, the panelists that I just introduced, they will discuss their cohort experiences.

Number two, they'll describe what they believe to be the ideal model of co-enrollment. They'll share their challenges that were identified with co-enrollment and they'll also share strategies that they identified to overcome those cohort, I mean those challenges with co-enrollment. Next, they will offer recommendations to operationalizing co-enrollment and then they will end the panel discussion by presenting their state co-enrollment action plan.

And while they're presenting the action plans, if you have questions we ask that you type those questions into the chat room. And please head in the questions. If you have a particular question for a particular state team, we would ask that you either type in the state name or the state abbreviation so that the teams will know that the question is directed to them. Otherwise, if you do not designate a state team, we'll know that the question is a general question and the teams will answer as appropriate.

So now I'll move into our introduction, background and structure. So as some of you may know, earlier this year between March and May, the Department of Labor Employment and Training Administration in collaboration with its other federal partners at the Department of Education, and that would be the Office of Career, Technical and Adult Education or OCTAE and the Office of Special Education and Rehabilitative Services, Rehabilitative Services Administration, RSA.

We collaborated to conduct an operationalizing WIOA cohort enrollment. And the cohort was developed in response to requests from states for technical assistance around co-enrollment, which is required under WIOA. This effort provided states with focused time and space to work collaboratively to explore the challenges and to identify best practices that could be utilized when co-enrolling WIOA participants, tracking their performance and reporting their outcomes.

Seven state teams were elected to participate. Those teams are California, District of Columbia, Kentucky, Massachusetts, Missouri, New Jersey and Pennsylvania. And I'd like to say that Missouri, the Missouri team was not able to join our presentation today, but I did want to acknowledge that they did participate in the cohort.

And at the end of the presentation, we do have a list of the entire state team for each state. We're not going to be able to list all of those today, but we did want to have those. They are – we did want you to know that they are included in the presentation for your information. But everyone on the team is acknowledged. So on behalf of ETA, OCTAE and RSA, we want to thank our state teams for their participation and their work in this cohort.

OK. Moving on to the background. Again under the WIOA statutes, states are required to include the number of participants who are involved in more than one core program in their annual performance report. By emphasizing co-enrollment at the federal, state and local levels, the workforce system will better, will be able to better develop an understanding of which programs are necessary for participant success and advancement toward their career and educational goals.

For the purpose of this cohort, co-enrollment is a very broad term. But for the purposes of this cohort, we're using two sources where co-enrollment is defined. The first source is from the Workforce Innovation and Opportunity Act of 2014 from the Title II final rule.

Co-enrollment is defined as concurrent enrollment or co-enrollment refers to enrollment by an eligible individual in two or more of the six core programs administered under the act. Additionally, co-enrollment is defined under the specifications of the WIOA statewide and local performance report template, which states that participants who received services under more than one core program are considered to be co-enrolled.

As states are working to determine effective processes for co-enrolling a participant, collecting their performance data and reporting it to their governing federal agency, the Department of Labor and Education are looking to gather more information on questions, concerns and progress made at the state and local levels toward this endeavor. This cohort provided a deeper understanding of where states are in their efforts to establish an effective and efficient process for co-enrolling WIOA participants and for what technical assistance and resources they would find useful along the way.

Moving on to discuss the structure of the cohort. The cohort was a mixture of virtual meetings and one in-person meeting. And as you can see from the slide, we had a virtual kick-off meeting in March, which was followed by another virtual meeting that focused on co-enrollment and the customer. That meeting was followed by another virtual meeting in April, which primarily focused on tracking and reporting co-enrollment participants.

Then in April, there was a day and a half in-person meeting, where the state teams came to the national office in DC to meet each other personally. The teams really felt like they had, they got a very good experience from the in-person meeting. The in-person meeting was followed by two virtual state presentations where the teams presented their state plans for co-enrollment.

OK. Next, we'll move into panel discussion and our first topic for our panelists is I'm going to ask the panelists to describe their cohort experiences. For instance, how did your state team benefit from the cohort model and how was the co-enrollment process affected by your team's participation in the cohort? So is there a state team who would like to go first and answer that question?

SACHA STADHARD: Hi. This is Sacha from Massachusetts. So we'll start off. Can you hear us? Can you hear me okay?

MS. CASERTANO: We can hear you.

MS. STADHARD: OK. Great. So Massachusetts already meets on a bimonthly basis around strategizing, crossing into partnership, joint partnership, joint policies, guidance and training necessary to move WIOA implementation forward. We really thought that there was value in the cohort model because it allowed us to have dedicated time to spend with our state-level partners, coming together focusing specifically on operationalizing co-enrollment.

We also were able to learn of successes and challenges that the others faced and encountering around operationalizing co-enrollment. And finally, I would just say that the cohort model gave us an opportunity to share practices on operationalizing co-enrollment. For example, we've developed a shared customer release form.

We're actually in the process of developing that now. And we've also made a lot of progress on customization of the workforce finesse. We've been able to come together with our state partners and develop a system to issue joint policies to all of our partners under WIOA. And some of these policies include the WIOA partnership customer and the joint partner local memorandum of understanding.

MS. LEWIS: Thank you, Sacha. Do we have another team?

MICHELLE JOHNSON: This is Michelle from the District of Columbia. One of the benefits I felt for our team was the opportunity to develop the state team action plan. I think we have been working together and meeting regularly to find those ways to streamline our service delivery system.

However, actually spending the time to develop and refine the action plan helped to solidify our vision and ensure that we have a mechanism by which to track our progress. I'd like to also ditto what my colleague in Massachusetts said that it was a wonderful opportunity to hear what other states are doing as well and to identify best practices for potential replication in the District of Columbia.

MS. LEWIS: Thank you, Michelle.

ALLISON JONES: This is Allison in Pennsylvania. Our local boards had been working towards co-enrollment strategies, but this was the first time that we really came together at the state-wide level to have a coordinated initiative around co-enrollment. So we were appreciative of the opportunity and were able to I guess come together as a state with local partners for the first time around this specific issue, something that we continue to do moving forward.

LOREN SHIMANEK: Hi. This is Loren Shimanek from the state of California. So I definitely want to echo what my cohort colleagues have said thus far. All those things ring true for our state. I would say that we have been convening since we've started this state planning process for WIOA.

And at the time, we identified a lot of challenges and barriers, not just around co-enrollment but how we were going to carry out the strategy and implementation, it being the first time we have worked together in various capacities at the state, local and regional level. So it was nice to get back with everybody and explore some of those challenges and barriers and also talk about the successes to date that we had established and how we can move forward.

So again, just to echo what the other states have experienced, we have the same experience. And you know it's now easy feat for California because we're such a large state to have those conversations and to bring in local partners. And then, as we'll get into in our presentation, practitioners from across both the core programs and strategic partners in the community colleges and Health and Human Services.

So having that conversation just expedited a process that needed to take place because everyone's had a lot of great input and yeah. It's something that needed to happen sooner rather than later, so this whole cohort process really helped kick things off.

NATALIE CUMMINS: This is Natalie Cummins in Kentucky. And yes. Everything that everyone else has said already. And Kentucky is a state where we had not really been meeting regularly, unlike in California or Massachusetts, where there was more of a structure in place already for meetings. So this was the nudge that we needed to start getting out of those silos that everybody talks about and they are real.

It was an opportunity for us to communicate across cabinets and across departments and establish some relationships that needed to be established here in the state as well as just the national cohort was good for those other reasons mentioned so that we could kind of gage where Kentucky is in relation to the other states and the district just to see that, oh, OK, well, we're doing actually better than we thought in this area. But oh. Wait. This is a place where we can really improve and here are some ideas that we can take with us to go forward to improve.

JOSEPH DOMBROWSKI: Hi. This is Joe Dombrowski, New Jersey. I just want to piggy back on what all of my colleagues have said and add one additional thing. And that is that in New Jersey in our state plans, we had originally proposed universal co-enrollment. And thanks to the participation in the cohort, we were really reevaluate our thinking on universal co-enrollment and we've sort of development more of an informed co-enrollment process and we updated our state plan this spring to reflect our new thinking.

MS. LEWIS: All right. Thank you, Joe. Appreciate that. So we'll move on to our next topic of discussion, which is the ideal model of co-enrollment. So during the cohort, our state teams were asked to describe the ideal model of co-enrollment that they considered, considering their states structure, policies, data tracking and sharing policies, leadership, guidance and communication for the local boards and service delivery providers. So now I'll ask you to if you would discuss your ideal state model and you can – could we begin maybe with Kentucky?

MS. CUMMINS: Well, thank you. I was just thinking back. So our ideal state model. Of course, as I recall from the homework assignment of that time, it was the ideal model unconstrained by such things as money and bureaucracy and that sort of thing.

But ideally, what we saw co-enrollment as being is easily referred, easily referable customers across the different agencies, different partners, the technology to track those referrals, not just to say that oh. They have been referred to this agency or that, but that we can see if they followed up. We can share case notes. We can share progress and then be able to refer back as needed and really be able to also count measurable skill gains across agencies, which is something that all of WIOA is concerned about.

We wanted to be able to align our internal policies more closely so that we aren't having policies that are cross purposes with each other basically. And we wanted to establish that a level of understanding at the state agency level of what all of our partners do and what we are responsible for and then ensure that that is taken out to the local level.

And at the local level, our partners in the field, the ones who act, you know, as boots on the ground, that they understand what all those partner agencies do because they're the ones who are really going to be enacting the referrals and helping to ensure that our customers receive all those services that they need. That's kind of the gist of what we saw as the perfect co-enrollment model.

MS. LEWIS: Thank you very much. And do we have another team who'd like to share their ideal model?

JENNIFER HERNANDEZ: This is Jennifer from California. So for us, we really took the approach that we wanted to build on the federal definition for co-enrollment. And so we're actually pursuing a concept that we're calling strategic co-enrollment so that we're not mandating co-enrollment across the board across different programs, but we really are focusing our efforts on the participants – the customers, right?

Making sure that the blending of services is correct to meet their needs. So I think that's what differentiates the approach that we're taking. But also more importantly, I think we really are looking at alignment and promising practices because folks in the field are doing this already.

In some cases, it's a really labor-intensive process where folks fill out multiple forms and literally make their own copies and hand it off to their partner to be able to do co-enrollment. So we are looking at streamlining the enrollment process. But again, I think for us the key distinguishing factor is this concept of strategic co-enrollment based on what's right for the person.

And then really being informed by what's already happening in the field and being able to build off of that.

MS. LEWIS: Great. Thank you, Jennifer. And moving on, do we have another state?

MR. DOMBROWSKI: This is Joe in New Jersey. I think that an ideal state for us would be that instead of having multiple doors – you know the old phrase there's no wrong door. We believe that for somebody should be one right door and that we really need like a front-end group of staff that are funded by all the various partners that are really the career navigators, the first point of contact in the system since we are, American Job Centers are One-Stop centers.

When customers come in, they should meet with a career navigator who is really knowledgeable in all the different services available throughout the system and can serve as that single case manager to manage the experience for the customer using best practices. And it would also help us try to minimize the duplication of services across the partners. Instead of multiple partners offering very similar types of services, the career navigator would help us be able to better create a system where duplication is minimized, and all of our partners can focus on what they do best.

MS. LEWIS: Great. Thank you, Joe. I appreciate your contribution.

OLGA YULIKOVA: This is Olga from Massachusetts and our – when we were considering the ideal model of co-enrollment, we put the customer at the center of the service delivery design and by customer we meant both job seekers and the employers as well. So the needs of the individuals were common into the ones of career center are the center of our view of the ideal model.

And that allows us to provide, as Sacha previously mentioned, single sign-on system that we're working with the workforce connect on. That will be an electronic tool that will also help case management of shared customer and may cross partner agency referrals. The system is based on data analysis and so all the alignment of resources and policies will be based on the data that we receive from the system as well.

And just like other states, we provide on the local level partner staff cross training for front-line staff of all partners who are co-located at the One-Stop career centers.

MS. JONES: This is Allison from Pennsylvania. We shared similar thoughts with our partner states, but I just wanted to add a couple things. One is like with California, we also wanted to think about co-enrollment not for the sake of it, but for when it made the most sense for the customer and that when we were co-enrolling, it would be supported by a strong referral network.

And that when we're enrolling people into programs, we're really enrolling them into a system of partners and not just a specific program. So we wanted to make sure that our co-enrollment practices recognized that there were a lot of different partners across the WIOA partner programs and sometimes even beyond WIOA that are pulling together to support a customer.

And then the other thing I wanted to add for us, we really felt like we needed more state-wide leadership and guidance around co-enrollment, so as we talk about our action plan later, you'll notice that we have a coordinated effort now to try to provide local – I guess get more information from our local boards about their experiences in co-enrollment so that we can share best practices, but also that we as a state are providing guidance to our local areas based on their feedback.

MS. JOHNSON: This is Michelle in DC. We perceived that we had been engaged in co- or multi-program enrollment for many years now. I think the challenge has been the fact that much of the work that we do or had been doing in our agencies was the result of a paper-driven referral system.

And so I believe that we, for our ideal model, we perceive that moving to a technology-based transactional data system that allows us to automate the process by which we refer customers for services, be able to track their receipt of those services, be able to examine whether or not they're making measurable skill gains or earning a high school credential or an industry-recognized certification, etc. would help us to get a handle on the work that we actually have been doing for quite a number of years.

I think additionally, we need that system to be able to generate the kinds of reports that will enable us to celebrate the work that we're doing as a unified education and workforce development system, but to also identify those areas by which we need to improve.

MS. LEWIS: Great. Thank you, Michelle. Does anyone else care to share before we move on? OK.

I'm going to veer away from our schedule just a little bit. We have some questions in the chat room, and so that they don't pile up, I'm going to go on and see if we can address some of those questions now. We have a question that is how do the states in the cohort track co-enrollment? Do partners share a common data system? And I think California, would you want to take that that question?

MS. SHIMANEK: Yeah. We can. This is Loren Shimanek from California. We can speak to that and I'd love to hear from other states as well as any of our cohort team members from California because when we talk about data sharing and data systems solutions, sometimes that's almost a non-starter.

California is so large and there's a lot of enterprise-level solutions as well as local area solutions and we wanted to be consistent in that conversation about what might be the best option for California going forward to track co-enrollment and really do the type of work that we want to do around strategic co-enrollment.

So we do track co-enrollments, but not – and we do this at the level in which we need to report to the departments on what we're doing for co-enrollments. But we don't do it in a way that we necessarily find of the greatest value. That being said, again, we have to be careful when we talk about using one single data system in our conversations, such as when we talk shared case management.

We want to ease off the management part and talk more about shared case coordination so that as my colleague Jennifer mentioned, people aren't handing around pieces of paper and holding meetings just to share information. That there is some type of technological innovation imbedded in how people do that work. That's what we hear from the field and that's what we want to support. But how we move forward on that particular aspect of both tracking co-enrollments and on sharing information about how we serve participants in California is still a very early conversation.

So all that being said, the caveat when we have conversations around reporting and tracking is one that recognizes that whatever solution exists for California has to take into consideration all of our partners' needs. So that's not just our core program partners in Title I, Title III, Title II adult ed and Title IV voc rehab, but also our strategic partners in the community colleges and Health and Human Services at the state and county level.

As one can imagine, that is a huge complex and dynamic conversation, but again I think what's important about this cohort experience is bringing everyone together to start unpacking what that potential short-term solution looks like so that we can do some of the innovative strategic co-enrollment that California would like to do as well as a comprehensive system and co-enrollment plan for our long-term strategy.

MS. LEWIS: All right. Great. Thank you, Loren. And there's another question. The question is how many of the presenting states have TANF as an optional One-Stop partner? And I think Massachusetts, and are you going to take that question?

KIMBERLY ROWE-CUMMINGS: Sure. This is Kimberly Rowe-Cummings. I'm from the Department of Transitional Assistance. We're a state partner with TANF as well as SNAP Employment and Training as well. So what we do is to make sure that we're not taking away from the co-case management, we have our staff on site once a week. And we do have a report that we exchange monthly showing these shared clients and their progress that they have.

So they use those opportunities to have a co-case management conversation. They also have access to our system, so if they have to maybe give child care or fix the transportation, any of the supports that we offer to make sure they're successful in the career center, they're able to – (inaudible) – at that time, so it makes it seem less on the client as well.

MS. LEWIS: All right. Thank you. And we'll take one last question, and this question is directed, is for you, Joe in New Jersey. It's in reference to universal co-enrollment. The question is, is that is to say that all participants are automatically pre-screened and referred or enrolled in all eligible programs?

MR. DOMBROWSKI: Yeah. Originally, our plan was to use universal co-enrollment to really have like a virtual triaging. So our plan in the state plan, we wanted to automatically co-enroll all RESEA participants that had a certain profiling score. So a profiling score is there – how likely they are to exhaust unemployment benefits before they've found a job. So we had put in our state plan that anybody that had a profiling score of 80 percent or higher would be automatically co-enrolled in Title I Dislocated Worker.

New Jersey has a general assistance program and we have a state law that says that general assistance applicants have to go through a 28-day protocol in order to successfully apply for benefits. So they have to come to the American Job Center and complete a 28-day program and we would automatically co-enroll those general assistance applicants in our WIOA Title I adult. So that is two examples. Another example is veterans that come and have a significant barrier to employment would be automatically co-enrolled as well in Title I.

So that was our original plan with the universal co-enrollment. The problems that we had with it was that there was customers that were in those categories that really weren't good candidates for co-enrollment. So that's why we moved from the automatic universal virtual triaging co-enrollment model to this more informed co-enrollment strategy.

JOHN BICICA: Yeah. I think we're kind of going more towards what California called the strategic co-enrollment approach, where it's, we're co-enrolling those customers who've been made aware of the partner's services and through assessment it's been determined that they're appropriate for those services.

MS. LEWIS: All right. Thank you, John and Joe. Let's move on. We have one more question that I think is a good segue into our next section, our next panelist question. This is a general question, so any state team can provide an answer. The question is have any of the cohort states experienced challenges with creating infrastructure funding agreements and or meeting performance indicators? And I just wanted to say our co-enrollment efforts have resulted in increase in program participants in many cases.

MS. YULIKOVA: Massachusetts is smiling because we definitely have challenges with shared infrastructures caused and some of the policy implementation. It's not easy when you have so many different agencies with different programs, integrities, regulations etc. involved. So the only way we're doing it is by very consistent, clear and concise communication with the people, with the local representatives through our policy group that meets. As Sacha mentioned, we meet regularly, twice a month.

And then if there are important policy decisions or implementation strategies, we release the information from our team as an online format as a letter. It's called Policy Issues. That's basically a paper, communication that goes out to every single partner in the state and it outlines the steps that are needed to be taken or any kind of regulatory questions that people may have, how to figure out the shared infrastructure cost for example, or any of those things. So it's very, very consistent and very clear and it helps disseminating information to everybody in the exact same format.

MS. STADHARD: And I will say that that was a big feat to be able to come up with joint policy communication across all of our WIOA partner programs. And our state leadership is really all on board together and moving forward with WIOA implementation. And I will just address the infrastructure funding agreement. What we've done in Massachusetts is to handle that at the state level.

We thought that it was extremely important to have the local level and local areas focusing on intermittent service delivery strategies and how they'll work together and how they will provide services in a seamless manner to customers coming into the career centers. So we decided that in order for them to have those conversations without thinking about the funding piece of it, that those, that funding agreements would be handled at the state level. So that's how we've approached that subject.

MS. LEWIS: All right. Great. Thank you, Massachusetts team. OK. We'll go back to our slide presentation now and we're going to go back to slide 20. And slide 20, it gives a summary of the ideal co-enrollment characteristics that were just discussed by your state teams. So it's just there for information. We're not going to discuss it. It's just for you to view and it provides a synopsis of the previous conversation.

So we'll move on now to our panel discussion question number three. During the cohort, the state teams were asked to describe in detail the challenges they faced in fully operationalizing their ideal model of co-enrollment.

So now I'm going to ask our state panelists to continue that conversation. I thought the last question was a good segue into this discussion. So beginning with our state panelists, would you give us your challenges and your strategies for overcoming those challenges for co-enrollment?

MS. STADHARD: Hi. This is Sacha again. So one of the challenges that we've come across, just to understand our partners' terminology. So we use different language I think to describe the same thing, and so we've learned that individuals that we're serving or individuals seeking services are sometimes referred to as customers and clients and consumers and participants, etc. So that can be really confusing sometimes when we're trying to essentially get to the same end game.

We're trying to serve the customer, provide the best quality of services. And what we've done to address this is we in Massachusetts use the term shared customer and what that does is it really signals to everyone that individuals seeking services from other partner programs that are receiving multiple services are indeed shared customers. And so that's how we are addressing that sort of terminology issue.

MS. JOHNSON: This is Michelle in DC. I'd like to echo what Sacha said. And that another challenge for us was the fact that I think all of the WIOA core partners staff do not fully understand or know about all of the programs and services that are being offered by each of the WIOA core partners. And so not only having knowledge about the programs and services, but also the eligibility requirements, their specific intake and assessment policies and procedures.

And so one way we've tried to address this is to have meetings regularly. We're working on developing an orientation and training presentation to be shared across all of the organizations. We have been engaged in a multi-agency professional development. And I think the more that we are engaging in meetings, the greater each agency's knowledge base is becoming. And so that's one way we address that issue.

MS. CUMMINS: Hi. This is Natalie from Kentucky and I'd like to build upon what was said there that one of the, definitely one of the biggest challenges is for folks in one agency to understand exactly what the people in another agency do and what, having a better understanding of what their eligibility requirements are. Not to screen for eligibility. We certainly don't want every core agency to have to screen for everybody else, but just to have a better understanding of – for example, I'm entitled to. And to have an understanding of what populations we can serve.

And so we have as a result of this cohort and our team, the team members that we have in this cohort from Title III, we were able to have a little policy put into place at our career centers or One-Stops that help give better guidance to those One-Stops on when to refer customers to adult education services based on (TABE ?) scores.

So that was something that seems like it maybe should have been self-evident, but it just wasn't. It wasn't understood what the requirements were over here on Title II and what we could serve and what we could do. And so we were still just not talking to each other. But that's still a challenge even with a policy in place. That is a challenge that is not going to go away overnight. It's something that will require consistent monitoring and consistent education as we go forward.

The other big challenge that we have in Kentucky, and everybody has this because I've seen this question pop up. I say everybody. Maybe not everybody. But it's a consistent data system, a data system that maybe not everybody is using exactly the same data system, but to have data systems that can communicate with each other.

Kentucky is one of those states that – actually we should be operating under the 1115 Waiver at this point. But of course, that was delayed by a judge's ruling. So we as a state have developed a rather large unit base that will underpin that waiver implementation and that will replace the data systems used by Titles I, III and IV. Pieces of it are already in place and it will be able to communicate eventually with the data system that is used by Title II by us.

So it's a challenge that is somewhat out of our hands. It's something that we are certainly part of the discussions on and we are kept in the loop about, but there's not a whole lot that we can do. So in the meantime, we are focusing more on keeping our team together, keeping the team that grew out of this cohort together, communicating regularly, meeting regularly and then strategizing of how we can take our messages to the folks in the field to keep that going while we wait on technology to catch up with what we want to do.

MS. JONES: This is Allison from Pennsylvania. That's a good segue to one of our major challenges here and that is we are working towards a system that is better able to communicate between programs. So our main case management and system of record is the Commonwealth Workforce Development System. We call it CWDS.

Some of the features that we are bringing into that system that align well with our co-enrollment activities include creating a single plan for customers. Right now, our customers may be filling out a plan for their activities in Title I or OVR or Title II adult basic ed, but our case managers and our program staff can't see the plans that our folks are putting on together. So they may have multiple plans and they may all say the same thing or they may say different things. So we're trying to work towards a single plan that would be able to be shared across programs.

Similarly, we don't have a good way of sharing information across programs within this system. So we are trying to develop additional referral capabilities that would allow our case managers to work towards co case management of customers so that they can see what's happening in a customer's plan and that they are able to refer a customer to another program within WIOA or even outside of our core programs.

So these are some examples of how we are trying to incorporate this lens of co-enrollment into some of our existing systems. And we're not quite there yet. We're in the development phase and we're going to be doing testing later this summer and fall. But slowly but surely, we're going to be making some progress in this area.

MS. LEWIS: All right. Thank you. Let's have one more state for this question. Anyone?

MS. YULIKOVA: Massachusetts has one challenge additional that we faced, which is keeping the integrity of individual programs intact while providing co-enrollment and co-location of different programs under the same rules of multiple One-Stop career centers. And that challenge allowed for an excellent opportunity, created an opportunity for shared branding. And (all state declared boss fire ?), it's a new branch unifying the entire Massachusetts workforce development system under a single name and a shared mission. And the statewide launch of it will take place in August.

MS. LEWIS: All right. Thank you very much for that discussion. We'll move on to the next set of slides. This is slide 22 and 23. These slides are, again, they're informational and they sort of recap the challenges and the strategies to overcome those challenges that were just discussed. There may be a few additional ones, but they're there for your information, so you can take a look at those online after our presentation.

So we will move on to our final panel discussion topic. And this is lessons learned and recommendations for operationalizing co-enrollment. What I want to ask that our state teams do this time is sort of, let's have a lightning round. Let's each team give either one lesson learned or one recommendation for our audience. And let's go in alphabetical order beginning with our California team.

MS. HERNANDEZ: Sure. Jennifer, I can chime in. I think the biggest lesson learned from our participation is that we need to have a unified policy across all of our WIOA and unified state plan programs.

MS. LEWIS: Great. Thanks, Jennifer and Michelle from DC.

MS. JOHNSON: One recommendation would be to not get discouraged, that it takes time to build collaborative relationships with other district government agencies and partners. But in due season, we will ultimately all arrive at the same place and that's enhanced service delivery for the people we're serving.

MS. LEWIS: Great. Thank you, Michelle. And from our Kentucky team.

MS. CUMMINS: So I think consistent and regular communication is the lesson that's learned. That you can't just say something once and have it stick. You have to say it multiple times and deliver the message in different ways and across many different levels of all the organizations in order to really operationalize this co-enrollment idea.

MS. LEWIS: All right. Thank you. New Jersey, that's Jill or John.

MR. BICICA: Great. Yeah. We just were talking about we think one of the critical things that make co-enrollment successful is cross training of the staff. We did go out and cross train employment service staff about all WIOA Title I services and the eligibility criteria. The next step is we're going to be cross training the Title I staff about all the programs at the state or under the offices of the state.

We have almost all the programs rolled up under us, Title II, obviously employment service, jobs for veterans, service grants, Trade Act and DVRS. So we're just, so we'll train the Title I about all the services those programs offer and the eligibility criteria for those programs.

MS. LEWIS: All right. Great. Thank you. And either Sacha or Olga from Massachusetts.

MS. STADHARD: Hi. So I think we echo a lot of what our colleagues were saying, but it's ditto. We think that it's really the state leadership needs to be on the same page and communicating the same message and there really needs to be a clear vision around co-enrollment because once the state leadership is on board, then that really can trickle down to the local level partners.

MS. LEWIS: All right. Thank you. And finally, our Pennsylvania team.

MS. JONES: We, as part of this cohort, all as states participated in the visioning sessions. What would be our ideal world of co-enrollment in our state? And I actually thought the exercise was really helpful in making us think about what co-enrollment looks like with all the real-life barriers.

So we did that visioning session and then we started to think about based on what our ideal world is, what can we do now and we triaged all of our ideas that you'll see later in our action plan. But I think the visioning session is really helpful to guide where you really want to go.

MS. LEWIS: All right. Thank you, state teams. And now, we'll transition into the next portion of our webinar today where our state teams will, each one will present their action plans. So during the cohort, the state teams were asked to create a action plan outlining the next steps that they planned to take towards operationalizing co-enrollment.

And as I stated before, they share those in the last two of the final two virtual sessions of the cohort. So California, would you like to present your action plan?

MS. SHIMANEK: Yeah. We'll start. Sorry. I'm getting accustomed to – okay. Got the slide there. So we'll just start at the highest level, which our goal. So through the, in the cohort we had homework assignments, met on a biweekly basis with all the other state teams and then we as a California team would meet and discuss.

We had flip charts and ideas planed all over the place about what an ideal co-enrollment model looks like. So ultimately that was distilled down into our action plan and as we started talking about what is it that we want to do in California both aspirationally and what's attainable in the shortest amount of time so that we can actually start doing co-enrollment, we came up with this idea for strategic co-enrollment.

So ultimately our goal is to develop guidance around what strategic co-enrollment looks like with the baseline of co-enrollment across ETA programs, across core programs and how you might do that with strategic partners. But then taking it one step further, what is the deliberate way in which you would braid and leverage resources and develop partnerships around programs designed to meet industry need to serve particular populations, and ultimately leverage that whole design into success?

And we're continuing to develop what that definition around strategic co-enrollment looks like. One that is complimentary to systemic comprehensive co-enrollment, but also one that helps kind of galvanize and is a vehicle of a lot of the implementation initiatives that are happening right now across our regions in California.

So just to read off the slide even though that's the worst thing you're supposed to do, what distinguishes strategic co-enrollment? It's really about shared responsibility. It's that up-front partnership agreement about what are your shared goals and how are you going to work towards meeting those goals at the local and regional level, and our response really at the state level is to help support those strategies.

A shared case coordination, as mentioned earlier, backing off from shared case management because connotatively that means we all are all working through some type of shared data solution. And while that may be a long-term goal, one of the conversations that disrupts co-enrollment is shared case management and using one management information system. And we were really focusing on how we do coordination around case management.

Braiding up resources. We like to use the term "braiding." Some people use "leverage." But it's really about kind of the art and science of how you take different funding streams and make it work to help better serve your population. As someone mentioned, everyone has kind of a different set of terminology for participants, which is the WIOA version of who we serve.

But we know we serve a diverse group of individuals from workers, students, employers, consumers, clients and we can keep going on and on. And then integrated service delivery, this is really about making it a seamless process for those interacting with the system and all the components that go into that.

So following from our action plan, we developed a series of work groups to really focus on the four key components, which is drafting policy guidance, exploring technical assistance and resources that can be used in the field as well as in employer engagement strategies, how we connect the strategy to industry needs and making employers a part of the process and speaking with one collective voice in those engagement strategies.

And then also, data systems and what do we need to do to get to a data sharing solution so that we can see just enough information to better enable those services and what are the systems in place or that could be piloted for better operationalizing co-enrollment and strategic co-enrollment?

And note aside, I do kind of differentiate because we start at the base definition of what co-enrollment is as provided in the presentation. But we want to unpack that to make it more deliberate and targeted.

So stakeholder input is a huge part of our process in everything that we do in California and we are fortunate to have a workforce association here that helps us in getting local practitioners involved in the conversation as well. We have our Health and Human Services in community college, state-level partners that also engage their local and regional partners with all the work that they're doing.

So we have a robust stakeholder input process, so it includes our core program partners, unified plan partners. So for instance, in California, TANF is not a mandatory participant, not a – wait. So I don't get mixed up. They are, as part of our strategic plans, they are a strategic partner, but they are not mandated. So them along with how we interact with community colleges, local workforce boards, of course our adult education partners.

So we have regional activities linking Title I, Title II and our community colleges through the adult education (bloc ?) grant. And then our Health and Human Service partners, CalWORKs, SNAP E&T and immigration refugee programs.

At this point I'm going to turn it over to my colleague, Jennifer Hernandez, to talk through the next slide.

MS. HERNANDEZ: Great. Thank you. So some of the key outcomes for our co-enrollment efforts are really focusing on being able to use this time to signal to the field that there is a co-enrollment guidance in process and that we'll, we have a very ambitious timeline. We want to have a draft of the guidance by September of this year.

Right now, we're currently in process of developing a informational notice that would go out to the field because, as many of you are aware, there is the WIOA planning process that will be commencing soon. And so we want to take advantage of that opportunity to start having regional and local conversations around how we implement a more robust strategic co-enrollment policy. So that's one effort.

But the other is that once we develop the policy, we recognize that it will only be as good as the effort we put around technical assistance and actually rolling it out and helping the local and regional folks understand how it can be implemented and how it works and how we can support them from the state level.

And so, one of our work groups is really focusing on establishing the unified technical assistance effort, where we would have representation from the various WIOA partners and unified plan partners to help develop the strategy, implement it and be more proactive about providing assistance in the field to address the issues that arise as this guidance is implemented.

The other is that we are, as was mentioned by many states, they've been struggling with the issue of various programs having different definitions. We're already in process of developing these various crosswalks, both on the data side and on the programmatic terms. That will be really useful so that folks can better understand the different programmatic components and the, on the performance side, the measures that folks are using.

And then the last piece that I would mention, and folks can take the time to read the other bullets, is that we want to make sure that we are able to leverage this co-enrollment strategy with the framework of career pathways, recognizing folks start in different places. But career pathways is one way to implement co-enrollment. Thank you.

MS. LEWIS: Hi. Thank you, Jennifer and Loren. We'll move on now to the District of Columbia's presentation on their co-enrollment action plan with Michelle.

MS. JOHNSON: Thank you. Our goals was to streamline the process for co-enrollment in the District of Columbia. And our strategy includes increasing, as I said it earlier, each WIOA core partner agency, staff persons and their providers and partners, understanding other programs and services that are being offered and the eligibility requirements, aligning our intake assessment, program service, program and service referral processes across all WIOA core partner agencies.

And then increasing the usage of the, a transactional data system that we have here in the District of Columbia entitled the DC Data Vault, to improve service delivery, facilitate co-enrollment and then track customer referral to, engagement in and receipt of services from WIOA core partner programs, other providers and partners.

The DC Data Vault is currently being used by the Office of the State Superintendent of Education. That's the agency to which I work for in the Department of Employment Services. We have been utilizing the vault for a few years now to provide assessments, learning needs screenings services to individuals in American Job Centers. And then also ensure that those students are referred to the appropriate providers for services.

Additionally, we are bringing in our human service partners as well as our Department of Disability services in the next couple of weeks. Additionally, our goal includes our identifying key staff from the WIOA core partner agencies to co-locate in American Job Centers to develop interagency MOUs and MOAs, where we leveraged fiscal, human and material resources.

We already have many of those in place with all of our partner agencies. We also have a multi-agency data sharing agreement amongst the WIOA core partners and we have established work groups. We hold meetings and we've been engaged in some cross-agency training and we're working on developing policies and procedures as well.

And then our final strategies, to continue to meet regularly and to monitor all the activities of the partner agencies. And the blessing is that our mayor and our city administrator are holding all the DC government agency directors accountable for ensuring that we fulfill this goal.

The expected outcomes include increase in the percentage of DC residents achieving their outcomes, transitioning from dependency to self-sufficiency and greater reporting accountability and performance across all members. Thank you.

MS. LEWIS: Great. Thank you, Michelle. And our next state team, Kentucky.

MS. CUMMINS: All right. Well, as I've kind of alluded to various portions of our co-enrollment action plan already, but our vision was to use these existing technology platforms and the ones that are being developed to really improve the referrals and make those referrals as seamless as possible.

And also, to improve the policy that we have across agencies to develop independent policies and then to develop joint policies. I'm going to address that a little bit more in just a second.

So the near-term goal is to increase referrals. And we have been working on that. I, as I mentioned, there was that policy put into place with our Title III partners. Title II, increase referrals to Title II. Title I and Title III have already had a co-enrollment policy in place for a few years, so that's good.

We are looking forward to the time when we have (Sarah ?) and KEE-Suite statewide. I saw those were mentioned on the slide a couple slides ago for some various pieces of the co-enrollment puzzle.

Moving on, we would like to develop a policy clearinghouse that would be able to share this information across our agencies. This of course is somewhat more of a labor-intensive process because it involves our individual agencies really having clear policies around co-enrollment first and then to work together on that, but we are communicating on that, and are looking forward to getting more progress made on that.

And then finally, we want to develop – (inaudible) – sustainable model of cross education. We would like all of our partners to have a simple summary of services, a PowerPoint or a video or something short that would explain the bulk of their respective services on their websites. And then also perhaps to have that in one central location.

I think that might answer a question that was raised from the people participating about having some kind of outline of services that all of the partners do. We don't have something quite like that yet, but we are working towards that. And that concludes what I have to say about us.

MS. LEWIS: Thank you, Kentucky team. And our next team will be Massachusetts.

MS. STADHARD: Hi. So we've already talked through our vision of the state model for co-enrollment, so we'll just go right into the state team action plan.

MS. YULIKOVA: Shelia, if you can move the next slide please. Thank you.

MS. STADHARD: OK. So we really have five strategies that we discussed and we kind of put forth in terms of our action plan. And the first is really around enhancing cross-training efforts across our WIOA partners. And so what we really want to do is follow up on the effectiveness of current cross-training efforts that have already taken place.

We're going to look at staff performance as it relates to training and how it's being implemented. That's surveys for front-line staff to determine how the training could be improved. We'll also be establishing a library of cross-training for new staff and staff sort of being on boarded. We'll have electronic and virtual tools that that can use.

And we really are looking at incorporating career pathway framework as part of our cross-training module. That was one of the sort of best practices that we heard that California was doing when we were at a team meeting in DC and we liked that idea.

A second strategy is really going forth with the implementing the Workforce Connect as the tool to facilitate co-enrollment across our partners. And so, some of the steps we'll take around that is to have continued meetings in order to customize Workforce Connect for Massachusetts.

The third approach is just making sure that our partners better understand the programs and resources that are available across all the partner programs because we saw that this would really increase and promote co-enrollment into partner programs.

Another strategy is around guidance on co-enrollment. And so, we'll continue to provide guidance for our local areas on how to co-enroll, when to do it and also how to record that data.

And then lastly, we want to ensure that our state and local partners have the opportunity to stay engaged around all things WIOA and that they'll continue to reach for technical assistance around WIOA implementation.

And so that would look like making sure that there is sort of dedicated time, so that we want to have some annual convenings and that partners at the local level will meet regularly around their memorandum of understanding and discussing integrated service delivery strategies for the continued implementation of WIOA. So I'll stop there. Thank you.

MS. LEWIS: All right. Thank you, Sacha. And we'll move on now to our New Jersey co-enrollment action plan.

MR. DOMBROWSKI: One of our first goals is to develop a common intake process of customer flowing co-enrollment strategy and the way we hope to accomplish that is establishing a common vision among all the partners that we want to successfully implement co-enrollment with. We want to use all data that is available to us. Right now, we don't have access to new hires registry for example.

And that would be powerful for us so that we would know almost immediately which customers that we're helping are successfully finding employment. And then that would make it easier for us to identify best practices among the partners and identify the characteristics of the individuals to know which would be the best prescription, educational or service-related prescription for those customers so they'd have the best outcome.

We want a common front-end system like other states have mentioned. Right now, we have four different systems among the partners that we fund to implement co-enrollment with. And being able to have a common front-end system would be beneficial.

Finally, we want to make sure that whatever system we implement as far as co-enrollment is concerned is not punitive, is not viewed as being punitive to the customer. A lot of the bureaucracy that we make our customers go through currently is seen as punitive, like why are you forcing me to attend this session; I'm not getting anything out of it.

So we need to be a lot better at selling our services and identifying what's best in the best interest of our customers to ensure that they realize the value that they're receiving through our services and not consider it to be punitive. All right. Thank you.

MS. LEWIS: All right. Thank you very much, state teams for your, for revealing your co-enrollment action plans. And just as a reminder to our audience, the state action plans can be downloaded from the chat room and we'll finish with a final presentation of the day from Pennsylvania.

MS. JONES: Thank you. So we talked a little bit earlier on about some of the components of our vision for co-enrollment, but just to summarize, we were really focused on the customer experience and making sure that we provide a high quality service in our career links, which are our American Job Centers, regardless of how or where a customer enters our workforce development system.

We want to make sure that it's an efficient and effective process for both customers and staff so that the customer is having a good experience and they don't necessarily need to be bogged down in all the behind the scenes, programmatic work that helps them as they work through the system. And we wanted to make sure that the experience is accessible to our diverse customer needs. And again, to focus on co-enrollment when it makes sense for the customer.

I talked a little bit earlier about some of our data collection and sharing challenges, so we wanted to make sure that we had a comprehensive case management and data sharing system that allowed us to communicate across programs and agencies. And as I mentioned earlier, we were also focused on making sure that the state is stepping up in providing leadership and guidance to our local areas around co-enrollment.

Next slide please. We based on our experience through our visioning process and from – we put together an action plan that had a number. It's pretty, quite ambitious actually. But it has action items in three broad categories. First one is around coordinated policy and development, so most of our workforce system policies are published or put out by our Department of Labor and Industry, which does coordinate with other state agencies on policies that impact their programs and initiatives.

But as part of the cohort, we learned about a peer state, Massachusetts, that issues joint policy guidance from multiple agencies at once. And since we are interested in taking this policy coordination to the next level, we plan on reaching out to our colleagues in Massachusetts to learn in greater detail how they approach joint guidance and whether it's an approach that works well for us in Pennsylvania.

And we want to also explore issuing guidance on co-enrollment best practices across the state, how we can incorporate co-enrollment into our MOU system and what the role of the operator of our local career links is in co-enrollment.

Our second bucket is related to cross-training and professional development, which you've heard a little bit about from other states. But we have, generally speaking, training programs and that take place kind of siloed within our different program areas and agencies.

And so we have a strong foundation for training, but I think there's an opportunity for us to coordinate those trainings to make sure that they're not continuing to happen in silos, that all of our career link staff and our program staff are getting a foundational level of information about each of our programs so that they are better able to identify opportunities for co-enrollment.

And we're also talking with our state workforce association about how we can incorporate both our action plan – briefing our local partners on our action plan, but also using some of their conferences and symposiums as a mechanism to garner local feedback on our action plan so that it's really, we're approaching co-enrollment from a state and local partnership.

And lastly, I've already alluded to our data collection and sharing challenges, but like I said, we're working to incorporate additional data sharing and collection capabilities into our existing case management and record system. And we want to make sure that we're doing it in an accessible and protected way. But we feel like this is an important first step to make sure that all our programs are able to communicate well together.

And the last thing I'll say is that our Title II providers don't actually use this system at all and we are talking now about how do we get them into the system so that we really, truly have all the core programs as part of it. Thank you.

MS. LEWIS: Thank you very much, Pennsylvania. And thank you to the rest of our teams again. We have about three minutes left on the webinar, so I'm going to just click very quickly through our state team representative slides. As you see there, those are the total, the complete teams that participated in the cohort earlier this year. So that's there for your information.

And now, we have a couple poll questions that we're going to put in the chat room for you to participate in. So hopefully – the first one is after hearing the action plans presented today, how interested are you in developing a WIOA co-enrollment action for your state? And the next question is, this is sort of a follow-up from the first poll question.

Based on the experiences and recommendations presented today by the state teams, how has your opinion about WIOA co-enrollment implementation in your state changed since the beginning of today's event? So looks like quite a few people are hopeful and inspired. Two people are pessimistic, uninspired. People interested in starting co-enrollment action plans in their state, it looks like the majority are very interested. So you continue with the poll questions and we'll put those in the background.

I want to go back to the presentation. If we could go back to the slides. Just a minute. I'll move on. Don't think we're going to have any time for any other questions, but I wanted to point out to you that there's some resources that are related to today's topic. And if anyone has questions about co-enrollment, they can e-mail us at ETAPerforms@dol.gov. Questions related to WIPS, our reporting system, should be e-mailed to WIOAFeedback@dol.gov.

And this is just a reminder that future events that we have coming up. There's a eligible training provider reporting webinar parts one and two on August 8th and August 22nd. And also, we'd like to inform you that there's a e-learning performance accountability summer series that just launched on Monday.

And you'll see there, there's three additional e-learning series that will be launched later on this summer. So those are there for your future information. So if you download the remainder of the presentation and the action plans, you should have all that information at your disposal.

I'd like to thank everyone for attending today's event. It is 3:30. As promised, we're presenting an hour and a half presentation. We apologize for not being able to get to more questions, but please feel free to continue completing the poll questions and remember the – I believe Laura will tell you about a questionnaire at the end of the presentation. So again, thanks everyone for coming.

On behalf of the Department of Labor's Employment and Training information, I mean Administration and the Department of Education, Adult Education and Rehabilitative Services Administration, we thank you for attending today's event.

(END)