Career Advisor Toolkit

Competencies and Resources for Workforce Innovation and Opportunity Act (WIOA) Title I Adult and Dislocated Worker Program Frontline Staff

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# Overview

**Can everything a Career Advisor needs to know fit neatly in one place?** The answer is simple – no. However, this toolkit is a great start. It’s a compilation of curricula and training resources designed for Career Advisors, collected from about 100 workforce professionals, other states, and the U.S. Department of Labor (USDOL). This is a living document. Use it to help kick start your workforce development career, grow your resources, and pass along that knowledge to your peers and colleagues.

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|  **Made for you and with you**  |
| New and seasoned Career Advisors play a vital role in guiding individuals toward fulfilling and sustainable career paths. This toolkit brings together the resources for Career Advisors to thrive and support Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker (DW) customers. | Career Advisors are also known as:Job CounselorsCareer NavigatorsCareer CounselorsCase ManagersWorkforce AdvisorsEmployment Specialists |

**Designed to evolve:** We are constantly seeking the best resources and we encourage you to share your favorites and add local information. Policies, programs, and staff needs constantly change, and we continually need better resources to respond to that change. We invite you to contribute to the evolution of this toolkit. As you find more and better resources, please share them by emailing LWDB@labor.ny.gov.

# Collaborative Development

We gratefully acknowledge the entire workforce system, from USDOL to our Local Workforce Development Boards (LWDBs) to our public-facing Career Advisors for the opportunities they create for all job seekers to find the career they love.

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| **The preparation of this toolkit was a team effort.** To learn about the roles and responsibilities of Career Advisors, we gathered resources and suggestions from about: |
| 75 local workforce professionals 35 statewide workforce professionals15 different states | 15 workforce professional training programs15 visits to local area programs |

Even with all this feedback and expertise, we are missing resources that Career Advisors need. As you find and create more training documents, please share them by emailing LWDB@labor.ny.gov.

This Toolkit would not have been developed without the collective expertise and time of the:

* New York State Department of Labor, Bureau of Workforce Innovation and Quality and Bureau of Employment and Workforce Opportunities staff; and
* Fellowship on Women & Public Policy, Rockefeller College, The State University of New York at Albany.

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| **Gratitude to County and LWDB Staff from:** |
|  Albany  Broome Chemung Clinton Delaware Erie Essex Franklin Fulton |  Hamilton Hempstead Herkimer Jefferson Lewis Madison Monroe Montgomery |  Niagara Oneida Orange Oyster Bay Rockland Saratoga Schenectady Schoharie |  Schuyler Steuben Sullivan Tioga Warren Washington Westchester Yates  |

# Using the Toolkit

The toolkit is categorized into 12 competencies for Career Advisors. Each competency includes:

* Questions to help you, as a Career Advisor, to understand your essential role; and
* Available resources and connections managers need to make for Career Advisors

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| **Career Advisors play a crucial role in helping customers develop their careers!** Your managers will train you, but there is a lot to absorb as you work with customers with various skills and abilities. |
| * Start with the competencies and learning questions.
* Explore the various available learning resources (webinars, videos, written guides).
* Personalize your learning!
* Seek out resources from experts in your office and managers to continue your learning.
* Share newly found resources by emailing LWDB@labor.ny.gov.
 |

**Managers of Career Advisors:** Effective onboarding relies on experienced advisors like you! The most effective way to onboard new Career Advisors is to spend time with them, patiently showing them all the aspects of their jobs. We have compiled resources to support you and your staff. Add your local resources to the toolkit. As you find better and newer resources, please share them.

# Competency Categories and Resources

As a Career Advisor, you will need to develop many competencies simultaneously. Under each competency are questions that you will face in the course of your job. If the available free resources do not offer you the answers you are seeking, please consult your supervisor, experts in your office, and/or state or local monitors to find answers. Share new or improved resources with LWDB@labor.ny.gov.

These competencies are not necessarily sequential, but they encourage concurrent learning with training/work you do on-the-job, along with job shadowing and practice with colleagues and your supervisor. **Please note that the learning questions in the left column do not always line up with the available resources.** Some resources may also answer multiple questions. Please consider also accessing the many relevant recorded trainings available on dews.webex.com. In most instances, these trainings utilize the password: DEWSWeb123.

**√ Competency Category – Learning with a Customer:** These six competencies focus on customer-directed, evolving learning:

* [Welcoming a Customer and Maintaining a Relationship](#_Welcoming_and_Maintaining)

* [Assessing Needs and Determining Eligibility](#_Assessing_Need_and)
* [Exploring Labor Market Information and Career Planning with a Customer](#_Exploring_Labor_Market)

* [Connecting a Customer with Job Search, Pre-vocational, and Training Services](#_Matching_with_Job)

* [Partnering for Resources and Referrals](#_Connecting_to_Resources)
* [Ensuring Data Entry with Data Validation for Eligibility, Services, and Performance](#_Ensuring_Data_Entry)

**∞ Competency Category – Setting the Stage:** These three competencies help build your foundation as a Career Advisor:

* [Understanding the Workforce System](#_Understanding_the_Workforce_1)
* [Being a Workforce Professional](#_Being_a_Workforce_1)
* [Including Everyone](#_Including_Everyone_1)

**You,**

**a Thriving Career Advisor!**

**+ Competency Category – Advancing Impact:** These three competencies help build your skillset to address customer needs as a team of staff and partners:

* [Leveraging Business Services](#_Leveraging_Business_Services)
* [Reaching More Customers and Partners](#_Reaching_More_Customers)
* [Keeping up with the Technology](#_Keeping_up_with)

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| --- | --- |
| **Competency & Learning Questions**You will be able to find the answers to questions … | **Resources & Connections**…with these resources and additional connections |
| Understanding the Workforce Development System | **∞ Competency Category: Setting the Stage** |
| *When you know the system, it is easier to navigate and help customers in their career development.* |
| **Workforce Structure**1. What is the role and structure of the workforce development system at the federal, state, and local level?
2. What do I need to understand about Adult and DW funding guidelines? How does the funding flow and affect my work?
3. What are the main services we offer?

**Primary Partners and Collaborators**1. Who are the experts in my office I can learn from and collaborate with?
2. Who are the primary customers the workforce development system serves?
3. What do local staff and NYS Department of Labor staff do differently?
4. Who are the required partners? How do their contributions impact my program and the system's overall goals?
 | * Overview:
* [USDOL WIOA 101 Series: e-Learning Module](https://d2leuf3vilid4d.cloudfront.net/MediaFiles/ws/performancereporting/Folders/%7B5144A4F4-FBEC-4FE3-8768-0C7DA231BE93%7D/637890912959776102/index.html?rev=#/)
* [Voices of Experience Videos](https://ion.workforcegps.org/resources/2016/10/12/11/27/Voices_of_Experience) (WorkforceGPS)
* [WIOA 101 Webinar](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=347409777&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000007590a6c0a0b4542a19fc9bbcac6b9e1f5db70b9e724d58cf8f03df6e3678d240e&Rnd=0.16522655462955993) (Password: DEWSWeb123)
* Topic-specific search:
* [Critical federal Training & Employment Guidance Letters (TEGL) and regulations](https://www.dol.gov/agencies/eta/wioa/guidance)
* [NYSDOL Technical Advisories and Program Guidance Letters](https://dol.ny.gov/policy-directives)
* NYSDOL Workforce Professionals Programs & Tools [webpage](https://dol.ny.gov/workforce-professionals-tools)
* [Memorandum of Understanding template for partners and services](https://dol.ny.gov/py-20-mou-template)
* Policy guidance:
* Reach out to LWDB@labor.ny.gov
* Your local area leaders
* Local Expertise:
* Local area policy and procedures
* [Local and regional plans](https://dol.ny.gov/workforce-development-plans)
* *(Add your local resources)*
 |
| Being a Workforce Professional | **∞ Competency Category: Setting the Stage** |
| *Helps you to understand your responsibilities and model professional behavior for customers.*  |
| **Professional Purpose and Communication**1. How can I make a positive difference in a customer’s career?
2. What are the key metrics of success for a Career Advisor? How is my performance measured and evaluated? What are the characteristics of an effective and empathetic Career Advisor? How can I excel?
3. How can I manage my time so that I can meet the responsibilities of my position?
4. How can I clearly convey information, ideas, and tasks to customers and colleagues? How can I actively listen and understand customer needs?

**Professional Ethics and Etiquette**1. What are my ethical obligations to customers? What legal guidelines apply to my work, particularly regarding confidentiality and non-discrimination?
2. How can I maintain professional boundaries while building rapport with customers and co-workers?
3. What are professional etiquette recommendations (e.g. dress code and technology use) in my office?

**Continual Professional Development**1. What resources can I find to stay up-to-date on workforce trends, credentials, and best practices?
2. What transferable skills am I building, and how can I leverage them for my skill development and customer support?
 | * Workforce Weekly calls
* [WorkforceGPS membership](https://www.workforcegps.org/) to receive newsletters, events, and other resources
* [”View session recordings” at the top right corner from DEWS WebEx](https://dews.webex.com/mw3300/mywebex/default.do?siteurl=dews&service=7) (Typically Password is: DEWSweb123, unless otherwise listed)
* Coursera for Career Advisor skill development from personal ny.gov account
* [Virtual training offered to customers](https://statistics.labor.ny.gov/career-zone/career-calendar.shtml)
* [Become a Certified Workforce Professional](https://www.nawdp.org/page/CWDPCertification) by the National Association of Workforce Development Professionals
* [21-1012.00 - Educational, Guidance, and Career Counselors and Advisors](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.onetonline.org%2Flink%2Fsummary%2F21-1012.00&data=05%7C02%7Cjuie.deo%40labor.ny.gov%7C3d9fd3d4d36f4f06c58e08dc3fbda9b4%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638455331859947316%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=JSvQhD3LVlhsuk3L99UYnLLKdWQcmvfdiygybQS8Y7w%3D&reserved=0) or other related O\*NET occupations to plan for skills and strengths you want to build
* [Confidentiality training](https://dews.webex.com/mw3300/mywebex/default.do?siteurl=dews&service=7) “View Session Recordings” at the top right and search for “OSOS Access” (password OSOS2021)
* [Rework America Alliance](https://www.workforcegps.org/resources/2021/05/14/19/33/Rework-America-Alliance-Resources) (WorkforceGPS)
* [NY Association of Training and Employment Professionals](https://www.nyatep.org/) (NYATEP)
* Local Expertise
* (Add your local resources)
 |
| Including Everyone | **∞ Competency Category: Setting the Stage** |
| *When you embrace the principles of diversity, equity, inclusion, and belonging, all customers and colleagues thrive.* |
| **Customer Backgrounds**1. How can I learn about my customers' cultures, socioeconomic backgrounds, language needs, and experiences? How can I learn more about their experience in the community?

**Strategies for Inclusive Service**1. How can I help all customers feel empowered to set career goals and plans?
2. What strategies can I use to support a customer’s career progress when facing multiple barriers to employment?
3. Is there anyone that I know or work with that has expertise in helping customers with unique backgrounds?
4. To help meet a customer’s goals, what tools and strategies can be used to combat the biases and inequalities a customer might be facing??

**Self-Awareness**1. How can I identify and manage my own implicit biases (e.g., assuming a customer’s competency based the customer’s visual appearances, pronouns, or abilities) to better serve customers from diverse backgrounds?
2. How do I avoid micro-aggressions\* or support customers who face them daily?
3. How can I adopt a trauma-responsive, culturally aware approach to customer service?
4. How can I identify the impact of racial inequity and better understand job seekers’ barriers and challenges and their significance to their job search?
5. What role does racial and gender equity play in the workplace?
6. What is the benefits cliff\*\* or what is the importance of benefit loss due to an increase in earned income?

\*A micro-aggression is a subtle intentional or unintentional interaction or action that conveys prejudice toward a marginalized group and is sometimes disguised as compliments or innocent questions. (American Psychological Association)\*\*A benefits cliff is a sudden and often unexpected decrease in public benefits that can occur to a person after a small increase in earnings. (National Conference of State Legislatures) | * [Trauma & Resilience Quick Guides](https://skilledwork.org/trauma-and-resilience-quick-guides-turning-knowledge-into-action/)
* [Harvard’s Implicit Bias Assessments](https://implicit.harvard.edu/implicit/takeatest.html)
* [Tips for specific job seekers](https://www.careeronestop.org/ResourcesFor/resources-for.aspx) (CareerOneStop)
* Expertise and services by:
	+ Interpretation services to communicate with customers in different languages, including American Sign Language
	+ [Veteran’s Program Specialists](https://dol.ny.gov/services-veterans)
	+ [Youth & young adult providers](https://dol.ny.gov/local-youth-assistance)
	+ [NorthStar](https://www.digitalliteracyassessment.org/manual) for digital literacy training | [Webinar Part 1](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=359220912&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b0000000674ec1a81f2909e9d1568a6366adf17fe527a8cc4a4000d732cd85cafcf46e1c7&Rnd=0.6089780904690387) | [Part 2](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=359225847&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000006824b8311fabec47acaf0c5c9484a1d06865e95281d7100e79a838cf8eb661ed7&Rnd=0.11520712186794424)
	+ [Federal Bonding, Re-entry Employment Specialists, and Prime Objective](https://dol.ny.gov/individuals-who-are-justice-involved)
	+ YourDreamYourTeam.com | Askjan.org
	+ Collaborate with: SpecialPopulations@labor.ny.gov
* Local Expertise
	+ [Disability Resource Coordinators](https://dol.ny.gov/NY_SCION) for individuals with disabilities
	+ Approach local agencies with expertise for training e.g., vendors of the Office of Domestic Violence Prevention, Mental Health or Health, etc.
	+ *(Add your local resources)*
 |
| Welcoming a Customer and Maintaining a Relationship | **√ Competency Category: Learning with a Customer** |
| *When you create solid relationships with a customer, follow-up throughout the year gets easier.* |
| **Resource Room and Front Desk**1. How can I effectively assist customers at the front desk and resource room, following the "No Wrong Door" approach?

**Getting Ready**1. What do I know about the customer and what is the plan I have for our meeting?
2. How do I start planting the idea of follow-up and building a long-term working relationship with the customer?

**First Impressions and Building Rapport**1. How can I develop my approach to best serve a customer's career development at different life stages?
2. How do I recognize which of the “Stages of Change” the customer is in to aptly inspire them to take action and thrive?
3. How can I create a positive and trusting environment with my body language and words where customers feel respected and valued?
4. How can I make my physical space inviting, warm, and inclusive without clutter, open positioning, and meaningful posters to engage the customers?

**Orientation and Intake**1. What open-ended and strengths-based questions can I use to learn about customer needs and goals?
2. How can I succinctly convey the breadth of services offered by the Career Center and its partners? How can I cover all the requirements without making it monotonous and without taking away the focus from the customer?
3. How do I ensure the customer has understood confidentiality expectations?
 | * [The 110 techniques of communication and public speaking | TED Talk](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.ted.com%2Ftalks%2Fdavid_jp_phillips_the_110_techniques_of_communication_and_public_speaking&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7C81b2a01c8cf84dc2100708dc6adaf12c%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638502735777572304%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=iTferWsrpyjpNhxpAe0cpqMKTsmEIwQczLYI3egrrOY%3D&reserved=0)
* [Six steps to employment and a framework for planning](http://www.kvccdocs.com/KVCC/2016-Fall/MHT226/lessons/L-02/Working-on-Purpose.pdf)
* [Principles of Strength-Based Practice](https://ighhub.org/sites/default/files/PrinciplesOfStrength-BasedPractice.pdf) | [Trauma-informed language](https://www.echoparenting.org/dev/wp-content/uploads/2018/08/Echo_Arrow_Print_8x11.pdf) | [Empathy Vs. Sympathy Video](https://www.youtube.com/watch?v=1Evwgu369Jw) | [Stages of Change and Motivational Interviewing](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.youtube.com%2Fwatch%3Fv%3DVcJDSuzaMRg&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7C723055090df941ef184d08dc6eb0c60f%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638506952713384628%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=YQVsIxssdkmb2aCNATa%2BreeJoi11tuePDI2TgcOQgj8%3D&reserved=0)
* [Integrated Case Management](https://www.workforcegps.org/resources/2015/05/26/12/15/Integrated_Case_Management-_Understanding_Big_Picture) (WorkforceGPS)
* [Donald Super’s Career Development Video](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fyoutu.be%2FW7CQnWsN6N4%3Fsi%3DAQc5nIqpVRRtJIld&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7C723055090df941ef184d08dc6eb0c60f%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638506952713401022%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=wmFOv%2B1qPGvdb7t1o%2BU8ZCRydsaJ3OMG8pkcdJsT4mI%3D&reserved=0)

[Super’s Life-Span, Life-Space](https://oitecareersblog.od.nih.gov/2016/01/25/career-development-theory-review-supers-life-span-life-space-theory)* [Career Center Virtual Orientation](https://www.youtube.com/watch?v=Umr_SrR9dbo&t=57s) video
* [Career Center Events:](https://statistics.labor.ny.gov/career-zone/career-calendar.shtml) Apt virtual workshops for soft/essential skills such as customer service, active listening, etc.
* Local Expertise
	+ Local intake and orientation processes
	+ Plan to learn about local agencies that can assist your customer. There may be materials in the Resource Room.
	+ *(Add your local resources)*
 |
| Assessing Needs and Determining Eligibility with a Customer | **√ Competency Category: Learning with a Customer** |
| *When you understand customers, their needs, and programs, you can start planning for services with them.* |
| **Eligibility with Customer Leading the Process**1. How can I understand customer needs, career aspirations, and any potential barriers they face from the forms they complete, and questions asked?
2. How can I help a customer take ownership of their career journey by setting goals, making informed decisions, and building an action plan?
3. How can I determine customer eligibility and ensure proper completion of paperwork?
4. How do I use the techniques in motivational interviewing to help customers feel empowered and supported?
5. How do I gauge the essential skills and ability of a person to gain and retain jobs? How do we offer trauma-responsive meetings with customers?

**Crisis Intervention and Urgent Needs**1. How do I recognize the customer’s need for additional support beyond career services (e.g., substance abuse, domestic violence, mental health, housing)?

**Summary and Required Follow-up:**1. How can I equip customers with essential resources and next steps, emphasizing our commitment to their success through follow-up (including any necessary formal agreements)?
 | * [Motivational Interviewing](https://www.youtube.com/watch?v=Pfn3Zvkby_A) (Iowa Workforce Development)
* [Mindset](https://www.echoparenting.org/dev/wp-content/uploads/2018/08/Echo_Arrow_Print_8x11.pdf) | [Understanding Intergenerational Trauma Vital for Career Professionals](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcareerwise.ceric.ca%2F2019%2F10%2F15%2Funderstanding-intergenerational-trauma-vital-for-career-professionals%2F%23.X5m84HhKhQI&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7Cd8ba1d1b963b4e6a4ecb08dc6f664841%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638507732351775687%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=9VhXA9m%2B1bRU9%2FvH05UxxNLtT0s88pcmFBvbNnKpIJE%3D&reserved=0) | [Steps to provide trauma-informed career development](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcareerwise.ceric.ca%2F2021%2F11%2F24%2Fpractical-steps-to-provide-trauma-informed-career-development%2F%23.ZBitFezMJQI&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7Cd8ba1d1b963b4e6a4ecb08dc6f664841%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638507732351785704%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=Jut8hNIIasUvXzqDaOaUwTC8CKbfvYU7gBcACFjoZbc%3D&reserved=0) | [Trauma-Informed](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.youtube.com%2Fwatch%3Fv%3DPZcgzeEpFUI&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7Cd8ba1d1b963b4e6a4ecb08dc6f664841%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638507732351792709%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=3A5RX5JQQJyaqj%2Bfsa%2BkZoSexbUUBOnXWPcjxECMBA4%3D&reserved=0) | [8 Dimensions of Well-Being and Values](https://www.traumainformedny.org/wp-content/uploads/TGW_TINRC_Tending-the-Roots_Handouts_v4_04222024.pdf)
* Initial Assessment Webinars (Password: DEWSweb123):
	+ [Initial Assessment Webinar Part 1: Eligibility](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=393194212&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000007cc38b1e6c19725f89ea32551507fd76d9b3ee87841cb59e08dd2d4a44cddb1c4&Rnd=0.20498053752310497)
	+ [Initial Assessment Part 2: Services](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=393331002&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b0000000712636a7c872fbedc8391bb1d62ef7c9b0d2fc450f2d95adb9230e10b34e2ecb0&Rnd=0.7979554086581668)
* Your local area may have different forms with the same content:
* [ES 100](https://dol.ny.gov/system/files/documents/2023/09/es100.pdf) | [Career Services Eligibility Survey (ES102)](https://dol.ny.gov/system/files/documents/2024/01/es102.pdf) | [ES102 Staff Guide](https://dol.ny.gov/system/files/documents/2023/10/es102-staff-guide-10-25-2023.pdf)
* [Basic Skills Assessment](https://dol.ny.gov/basic-skills-assessment)
* [Job Search Survey](https://dol.ny.gov/system/files/documents/2023/10/job-search-survey-10-25-2023.pdf)
* Eligibility determinations:
* APoS Technical Advisory #[23-01](https://dol.ny.gov/system/files/documents/2023/01/ta-23-01.pdf)
* [Eligibility and Adult Priority of Service Matrix](https://dol.ny.gov/eligibility-and-apos-matrix)
* Program Guidance Letter #[22-01](https://dol.ny.gov/system/files/documents/2022/09/pgl-22-01-dw-interpretation-draft-09-21-2022.pdf) DW eligibility
* [Income Eligibility Guidelines](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fdol.ny.gov%2Fworkforce-professionals-tools%3Ff%255B0%255D%3Dfilter_term%253A801&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7C00532d70f4664b662cd908dc487b7957%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638464942361134444%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=km8M8LnnKIuMneIXh6IrYvKX3VmcgMLCR15RmlhrlbQ%3D&reserved=0)
* Check Data Entry and Validation Competency of this toolkit
* Local Expertise:
* Follow-up policy
* Local Initial Assessment forms
* *(Add your local resources)*
 |
| Exploring Labor Market Information and Career Planning with a Customer | **√ Competency Category: Learning with a Customer** |
| *Customer understands where their strengths and the labor market intersect so they can begin on a self-sustaining career path.* |
| **Labor Market Information Resources** 1. How can I learn about labor market trends, job vacancies, and favorable careers?
2. Where can I find resources to assist people searching for jobs in a specific field?
3. What are occupational profiles and what valuable information can the customer gain from them?

**Career Planning and Assessments**1. I want to help customers develop potential career options, so how can I obtain more information on:
	1. Recommending digital resources for researching pathways;
	2. Providing career assessments based on skills, interests, and values;
	3. Translating assessment results into actionable steps for personal, job-specific, digital, and transferable skill development;
	4. Matching them with suitable jobs based on skills and job analysis;
	5. Identifying their strengths, knowledge, skills, abilities, and areas for skill development; and
	6. Facilitating skill-building and job readiness or employability?
2. How can I present career exploration information to customers in a clear, concise way, and what materials (printed or digital) would be most helpful for them to reference later?
3. How can I discuss a customer's short-term and long-term goals, both personal and professional, to help them set Specific, Measurable, Attainable, and Realistic, Time-bound (SMART) goals that integrate their overall aspirations with their career aspirations?
 | * Learn from [NYSDOL Labor Market Analysts](https://dol.ny.gov/labor-market-analysts) | [Labor Market Information DEWS Webinar](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=340789827&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000006259dd14e92396b050db9d0a2884a7c2948c9284c2696810ffa85147ee4858fb5&Rnd=0.049929433844846494)
* [NYS Occupational and Industry Projections](https://dol.ny.gov/occupational-and-industry-data)
* [Jobs in Demand Today](https://dol.ny.gov/jobs-demand-today) by region
* [Self-Sufficiency Estimator](https://applications.labor.ny.gov/SEE_Project/)
* [New York State](https://newyork.usnlx.com/index.asp) Job Bank and other online job banks like Indeed and LinkedIn
* [NYSDOL Virtual Career Center](https://dol.ny.gov/virtual-career-center-ind)
* [Career OneStop](https://www.careeronestop.org/) **|** [Self-Assessments on Interests, Skills, and Work Values](https://www.careeronestop.org/ExploreCareers/Assessments/self-assessments.aspx) **|** [Occupational Profiles](https://www.careeronestop.org/ExploreCareers/Learn/career-profiles.aspx)
* [Occupational Informational Network (O\*Net)](https://www.onetonline.org/) [Overview Video](https://www.onetcenter.org/image/videos/short.mp4) **|** [Occupational Profile Video](https://youtu.be/Fx4GXdsxUKQ?list=PLBju6-vl4h434IfNQvPvLofAh0vYQcLvb) **|** [Desk aid](https://www.onetonline.org/help/online/deskaid) **|** [Training Videos](https://www.onetcenter.org/videos.html)
* [My Next Move](https://www.mynextmove.org/) – Streamlined and guided application with key O\*NET information for job seekers | [Discover Your Interests](https://www.mynextmove.org/explore/ip) – O\*NET interest profiler **|** [Simpler Occupational Profiles](https://www.mynextmove.org/find/browse?c=0)
* [mySkills myFuture](https://www.careeronestop.org/ResourcesFor/CareerChanger/career-changer.aspx) for career changers
* [Para hispanohablantes](https://www.careeronestop.org/ResourcesFor/ParaHispanohablantes/para-hispanohablantes.aspx) for Spanish speakers
* [My Next Move for Veterans](https://www.mynextmove.org/vets/) – Helps veterans find a civilian career similar to their military job
* [GetMyFuture](https://www.careeronestop.org/ResourcesFor/YoungAdult/young-adult.aspx) for young adults ages 14 to 24 years
 |
| Partnering for Resources and Referrals | **√ Competency Category: Learning with a Customer** |
| *When your customer needs additional assistance, you can connect them to other agencies and organizations.* |
| **Available Resources and Partner Programs**1. What resources and programs can I leverage to support a customer's career goal?
2. Where does our office maintain a list of active partners and their points of contact? What is the best way to reach out to these contacts? What should I say to these points of contact when I reach out? Who in my office already has strong relationships with them?
3. How do I contact the referral agencies for the questions in the ES102?
4. What are my local area parameters for supportive services and what can we offer? If we do not offer specific supportive services that might help someone, how might I work with a customer to find them?
5. How do I connect customers with appropriate resources, including government assistance and supportive services (e.g., childcare and transportation)?

**Direct Linkages and Referrals**1. What forms and agreements do I need the customer to complete to make referrals to employers and other services?
2. How can I help my customer build their social capital\* and supports they need to thrive (e.g., mentors, religious leaders, family, barbers, doctors and other social supports)?
3. How do I create interest in the customer to participate in volunteer and leadership opportunities to build essential job skills?
4. How do I initiate and support Integrated Resource Teams?

**Supportive Services Follow-up**1. How do I keep a customer engaged and support them with follow-up?
2. How do I gather info from referred partners to co-case manage and support the customer?

\*The professional or personal relationships people develop to secure benefits and invent solutions to problems through social networks. (Encyclopedia Britannica) | * Referral process:
* Release of Information form based on [Technical Advisory #19-01](https://dol.ny.gov/system/files/documents/2023/10/ta-19-1_0.pdf)
* [Making Referrals to Workforce Partners Webinar](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=389592177&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b000000071a7d5cca155b149edefe36dd68258a90b6223657c7da03c88a486f13d644ef59&Rnd=0.8029268424530778) (password: DEWSweb123)
* YourDreamYourTeam.com
* Building referral partnership inventory:
* [Findhelp.org](https://www.findhelp.org/) free/reduced-cost resources for food, housing, financial assistance, health care
* [211.org](https://www.211.org/) connects you to expert caring help
* [Practitioners guide for supportive services](https://www.dol.gov/sites/dolgov/files/ETA/advisories/TEN/2021/TEN_12-21.pdf) (WorkforceGPS)
* [Vocational Rehabilitation](https://www.acces.nysed.gov/vr)
* [Taking Care of Your Mental Health During and After Job Search](https://dol.ny.gov/taking-care-of-your-mental-health-during-and-after-job-search)
* “Including Everyone” Competency in this toolkit
* [Virtual workshops](https://statistics.labor.ny.gov/career-zone/career-calendar.shtml) for customers, but relevant for staff to learn on ACCSS-VR, Child Care Assistance, SNAP
* Local Expertise:
* Local Supportive Services Policy and Process
* Local resources mapping or partner referral guide for your local area
 |
| Connecting with Job Search, Pre-vocational, Training and Follow-Up Services | **√ Competency Category: Learning with a Customer** |
| *When your customer needs job search and career development, you can connect them to apt services.* |
| **One-on-One Customer Services**1. How do I create an Individual Employment Plan? What does it include?
2. How can I help a customer put together and participate in a set of services for their needs and build their own career journey?
3. How do I support the customer as they decide which in-person and/or online services they need and want to pursue, and how do I connect them to those services? Where do I find a menu of services that I can reference during meetings?

Services such as: | * Job Search Support:
* [Career Center Events:](https://statistics.labor.ny.gov/career-zone/career-calendar.shtml) Virtual workshops on resume development, interviewing, social media usage, career fairs, micro-credentials, and more
* [Job Search Tips](https://www.careeronestop.org/JobSearch/job-search.aspx) (CareerOneStop)
* [Find Career You Love Guides and Job Search tools](https://dol.ny.gov/find-job-0) (dol.ny.gov)
* [Practice Interviewing:](https://dol.ny.gov/interviewing) | [Interview Stream](https://dol.ny.gov/interviewstream)
* Pre-vocational and Basic Skills:
* [SUNY Attain Labs](https://www.sunyattain.org/)
* [Instructional videos for Excel, math, tech](http://www.GCFlearnFREE.org)
* [Improve typing skills](https://www.typingclub.com/)
* [NorthStar](https://www.digitalliteracyassessment.org/) for basic and advanced digital skills | [Webinar Part 1](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=359220912&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b0000000674ec1a81f2909e9d1568a6366adf17fe527a8cc4a4000d732cd85cafcf46e1c7&Rnd=0.6089780904690387) | [Part 2](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=359225847&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000006824b8311fabec47acaf0c5c9484a1d06865e95281d7100e79a838cf8eb661ed7&Rnd=0.11520712186794424)
* Training Services:
* [Eligible Training Provider List](https://apps.labor.ny.gov/ETPL_V2/providerSearch.xhtml)
* [Apprenticeship Overview](https://dol.ny.gov/apprenticeship/overview) | [Active Sponsors](https://dol.ny.gov/list-active-sponsors) | [Current Recruitments](https://dol.ny.gov/apprenticeship/apprenticeship-announcements)
* Education Services:
* [Four pathways to high school equivalency](https://www.acces.nysed.gov/hse/high-school-equivalency-hse) (GED and National External Diploma)
* [Adult Education Programs](https://www.acces.nysed.gov/aepp/welcome-adult-education-programs-and-policy-aepp)
* Coursera through NY.gov and other online learning platforms
* Group Services:
* [Start a Job Club!](https://nvtac.org/wp-content/uploads/2019/11/JobClubToolkit.pdf)
* [Career Center Events:](https://statistics.labor.ny.gov/career-zone/career-calendar.shtml) Virtual workshops
* In-person workshops
* Local Expertise:
* Individual Training Account Policy
* Training Policy
* Follow-up policy
* Service planning and goal-setting forms
* Additional contacts and communication preferences form
* Local Demand Occupation List and Classroom Training Demand Occupation List
* List of approved training providers and schools
* *(Add your local resources)­*
 |
| Job SearchResume creation or update InterviewsWorkshopsNetworking and online job searchOnline presence and social mediaVirtual Career CenterTax credit programsEducational Services High school equivalency (GED, National External Diploma)Integrated education and occupation English as a Second LanguagePostsecondary education  | Pre-vocational and Basic SkillsDigital literacy skillsWork readiness skillsVirtual RealityTransitional jobs/Work Experience TryoutsFinancial LiteracyOccupational Skills Training Apprenticeship/pre-apprenticeship On-the-job or customized trainingIncumbent worker trainingIndividual Training AccountFree online training |
| **Job Search and Interviewing Support**1. How can I best help a customer to prepare for their job search depending on their circumstances (e.g., resume, cover letter, interview, salary negotiations, unique situations, etc.)?
2. How can I help the customer understand the scope of a successful career search?

**Services in a Group**1. How can I effectively facilitate workshops and group sessions to equip customers with job search and other essential skills?
2. What are the best practices for establishing and supporting online and/or in-person job clubs for customers?
3. How can I encourage businesses and training providers to partner with us to provide interviewing and soft skills training to groups of customers?

**Wrapping up meetings**1. How do I make sure that the key takeaways from a meeting stick with a customer?
2. Have I explained how I plan to follow up with a customer, and has the customer provided me with the appropriate contact and backup contact methods to do so?
3. Has the customer written down and committed to the next steps discussed?
4. Have I made a concrete plan with the customer of the next follow-up check-ins?

**Career Services Follow-up**1. How can I effectively support my customers' progress and adapt plans as needed?
2. Did I thoroughly explore all other avenues for services and labor market information that I can share with the customer?
3. How do I plan to make the follow-up more meaningful and service-orientated than only asking for documentation and/or a verbal summary??
 |
| Ensuring Data Entry and Validation for Eligibility, Services, and Performance | **√ Competency Category: Learning with a Customer** |
| *When we generate reliable data, we can see where and how we have made an impact.* |
| **Why enter and validate data?**1. Why is data collection and validation important?
2. How does my data entry translate into the performance of the local area?
3. How do I achieve small wins in data entry if long-term performance is not in my control?
4. What are the six WIOA indicators of performance and why do they matter? How does Adult Priority of Service (APoS) fit in? How does accurate and timely data entry help meet those outcomes?
5. What are specific data validation requirements?

**How to enter data?**1. How and where do I record customer information?
2. How and where do I keep and manage customer notes?
3. How do I enter data for eligibility, and ensure that all the services the customer receives are recorded along with performance?
4. Who can help me learn about data entry? How do I keep up with changes in data entry tools and rules?
 | * Performance Technical Advisory #[18-06.3](https://dol.ny.gov/system/files/documents/2024/04/ta-18-06.3-primary-indicators-of-performance-04-22-2024.pdf) | [Goals and Reports](https://dol.ny.gov/performance-indicators-goals)
* Indicators of performance e-learning modules (WorkforceGPS)
 |
| [Employment rate, 2nd and 4th quarter](https://performancereporting.workforcegps.org/resources/2018/08/13/13/33/Employment-Rate-2nd-and-4th-Quarter-E-Learning-Module)[Median Earnings](https://performancereporting.workforcegps.org/resources/2018/08/24/19/23/Median-Earnings-E-Learning-Module) | [Measurable skills gain](https://performancereporting.workforcegps.org/resources/2018/07/30/12/57/Measurable-Skill-Gains-E-Learning-Module)[Credential attainment](https://performancereporting.workforcegps.org/resources/2018/07/02/19/10/Credential-Attainment-E-Learning-Module) |
| * Adult Priority of Service Technical Advisory #[23-01](https://dol.ny.gov/system/files/documents/2023/01/ta-23-01.pdf) | [APoS Resources](https://dol.ny.gov/synergy-forum-wioa-adult-priority-of-service)
* [Data Element Validation (DEV) Chart](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fdol.ny.gov%2Fworkforce-professionals-tools%3Ff%255B0%255D%3Dfilter_term%253A2076&data=05%7C02%7CJuie.Deo%40labor.ny.gov%7C00532d70f4664b662cd908dc487b7957%7Cf46cb8ea79004d108ceb80e8c1c81ee7%7C0%7C0%7C638464942361104298%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=px6%2B3civPmiVRh2CfTiu%2BiLQ2EDY%2FTRSuPNWATgvWmc%3D&reserved=0) | DEV Technical Advisory #[23-03](https://dol.ny.gov/system/files/documents/2023/10/ta-23-03-data-element-validation-04-28-2023_0.pdf) | [State Monitoring Guides](https://dol.ny.gov/monitoring-guides)
* [DEWS.WebEx](https://dews.webex.com/mw3300/mywebex/default.do?siteurl=dews&service=7), “view sessions recording” on top right and search “OSOS”
* [OSOS Guides](https://dol.ny.gov/workforce-professionals-tools?f%5B0%5D=filter_term%3A811) ([Programs & Tools Webpage](https://dol.ny.gov/workforce-professionals-tools): JobZone, OSOS & REOS filter)
 |
| [Creating a Basic Customer Record](https://dol.ny.gov/osos-guide-basic-customer-record)[Employability Profile OSOS Guide](https://dol.ny.gov/osos-guide-employability-profile)[Documenting DW Status](https://dol.ny.gov/osos-%20dislocated-worker-status) [Dislocated Worker OSOS Checklist](https://dol.ny.gov/osos-dislocated-worker-checklist) [Comprehensive Assessment & Supplemental](https://dol.ny.gov/osos-guide-comprehensive-assessment)[Attachments Tab](https://dol.ny.gov/osos-guide-attachments-tab) [Language Services](https://dol.ny.gov/osos-guide-language-services) [O\*Net Titles](https://dol.ny.gov/osos-guide-onet.pdf)  | [Recording an Initial Assessment](https://dol.ny.gov/osos-guide-initial-assessment) [L1 OSOS Selected Enrolling Activity](https://dol.ny.gov/osos-level-1-selected-enrolling-activity)[L2 OSOS Services Definitions](https://dol.ny.gov/osos-level-1-selected-enrolling-activity)[Performance Measures/Outcomes](https://dol.ny.gov/osos-guide-wioa-primary-indicators-of-performance)[Job Matching Guide](https://dol.ny.gov/osos-guide-job-matching)[SSAN Model of case notes](https://dol.ny.gov/ssan-model-case-notes-in-osos)[Equal Opportunity](https://dol.ny.gov/osos-guide-equal-opportunity)   |
| * Technical or email assistance for data entry:
* Help.OSOS@labor.ny.gov | Phone: 518-457-6586
* Ask questions to your local and state monitors
* Local Expertise: (Add your local resources)­
 |
| Leveraging Business Services | **+ Category: Advancing Impact** |
| *When we know the talent needs of businesses and the strengths of the customers, we can help them find each other.* |
| **Business Partnerships**1. How can I be aware of relationships with local employers, upcoming recruitment and fairs, and other business services priorities?
2. What do local and NYSDOL Business Services staff and teams do in our local area? How can I partner with them?
3. How can I identify the needs of businesses and connect them with appropriate business services?
4. How can I involve businesses in designing and delivering programs to improve services and help them find suitable candidates? This includes programs like transitional jobs/work experience, mentoring, job clubs, career exploration, workshops, job placements, on-the-job training, and customized training.
5. How can we deepen our engagement with businesses through participation in boards, fundraising initiatives, sector partnerships, and other means?

**Assistance to Businesses**1. How do the responsibilities of Career Advisors fit into the local area's business engagement process? What is the overlap with staff who develop jobs and work more closely with businesses?
2. What tax credit and incentive programs can I share with businesses to encourage them to work with us?
3. How can I help businesses develop high-quality, inclusive job descriptions and post them on job platforms (Virtual Career Center and NYS Job Bank.)?
4. How can I help employers understand the specific needs and strengths of individual job seekers I work with?
5. What resources are available to support new employees and employers during the first few weeks?
 | * DOL Business Engagement resources:
	+ [Business Resources](https://dol.ny.gov/services-businesses)
	+ [Factsheets and Forms](https://dol.ny.gov/business-services-forms-and-publications)
	+ [Work Opportunity Tax Credit](https://dol.ny.gov/wotc-program)
	+ [Virtual Career Fairs](https://statistics.labor.ny.gov/career-zone/career-calendar.shtml?trumbaEmbed=view%3devent%26eventid%3d174051112)
	+ [Regional Business Services offices and representatives](https://dol.ny.gov/contact-business-services)
	+ [Virtual Career Center](https://dol.ny.gov/virtual-career-center) for Businesses
	+ [Federal Bonding](https://dol.ny.gov/individuals-who-are-justice-involved)
* [CareerOneStop Business Center](https://www.careeronestop.org/BusinessCenter/default.aspx?frd=true)
* Partner with NYSDOL Business Services Representatives, Regional Business Services Teams, and the local Chamber of Commerce
* [Resource Guide to Engaging Employers](https://www.jff.org/wp-content/uploads/2023/09/A-Resource-Guide-to-Employer-Engagement-011315.pdf) (Jobs for the Future)
* [Reimagine Employer Engagement Toolkit](https://www.reimagineretailchicago.org/wp-content/uploads/2019/07/Reimagining-Employer-Engagement-A-Toolkit-for-Providers-1.pdf) (Aspen Institute)
* Local Expertise
* Follow-up policy
* Local forms
* (Add your local resources)­
 |
| Reaching More Customers and Partners |  **+ Category: Advancing Impact** |
| *When we form strategic partnerships in our communities, we can reach our customers and goals.* |
| **Finding Customers**1. Where and how can I find people in the community who need employment services?
2. How can I effectively market our program as a valuable resource to our community?
3. What are some unique services that my program offers – my elevator pitch?
4. How can I build our capacity to advocate for, motivate, recruit, and engage Adult Priority of Service customers? Have we partnered with the local NYSDOL and Department of Social Services offices?

**Forming Partnerships**1. How do I create relationships and network with other community agencies and potential partners? How do I build collaborative relationships and manage partnerships?
2. What are the needs of these partners and the organizations they are affiliated with?
3. How do I identify a range of community resources (people, places, things, and money) that can assist customers?
4. Many of the people I meet will need additional services. What other services can I refer them to?
5. How can I build collaborative relationships between customers and organizations/partners in the community providing the services they need?
6. How do I continually maintain a Resource mapping inventory for organizations for referrals and recruitment? Who in my office maintains referral lists and partnerships?
 | * [Strategies for Adult Priority of Service](https://dol.ny.gov/system/files/documents/2024/04/synergy-forum-wioa-adult-priority-of-service-1.pdf): Ideas on recruiting individuals in need of improving basic skills, on public assistance or low-income, and partnership building.
* Understand the services, performance goals, and needs of organizations that work with your target population
* Develop an outreach plan to establish points of collaboration and an elevator pitch for businesses and community organizations
* Establish a working relationship with organizations and develop plans to collaborate
* Attend local partnership meetings with businesses, schools, training providers, take tours
* [WIOA 101 in the context of referrals and partnerships (wisconsin.gov)](https://wioa.wisconsin.gov/roundtable/presentations/9-WIOA-101.pdf) (Note that the number of local boards and names of agencies in NYS are different)
* Mining OSOS for local business data and outreach efforts
 |
| Keeping Up with the Technology  | **+ Category: Advancing Impact** |
| *When we keep up with technological innovations, we have more opportunities to help a customer.* |
| 1. What new technologies should I learn about to best help my customers?
2. How can I teach customers to develop a professional social media presence that will help them find employment and not sabotage their job search? What are the latest job search platforms and online resources emerging in the market? What industry publications, online communities, webinars or conferences, key influencers, and thought leaders focusing on trends in job search technology?
3. What skills or certifications are valuable for Career Advisors to stay relevant in the technology-driven job market?
4. Are there online courses or training programs that can help me develop expertise in using tech tools for career guidance?
 | * Create and explore your own social media profiles
* Virtual Reality headsets help people explore careers and build occupational skills.
* [Virtual Career Center](https://dol.ny.gov/virtual-career-center-ind) | Introductory Video | Introductory Video **|** [Virtual Career Center Overview](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=404041047&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000007a844788b33db25455982c23bda272ad18984e263adbff2190efa9a6ebc57b7bc&Rnd=0.4732264330844783) Webinar | [VCC and Case Manager Webinar](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=351395347&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000006e5f97414d458ba5c30d98d40cb35a83fc1a039d07fe268ac56bc87f10b389643&Rnd=0.9384632545731841) (password: DEWSWeb123)
* AI platforms, such as ChatGPT, Gemini, or Copilot
* Interview Stream and other interview preparation tools
* [Coursera](https://dol.ny.gov/online-learning-coursera) | [Overview Webinar](https://dews.webex.com/tc3300/trainingcenter/record/downloadViewAction.do?recordId=211158147&siteurl=dews&actionType=view&setted=101&internalrKey=4832534b00000006cc7a2efe6d51442c326fa6b51c28f9013dca897e6f590ecac93650c64cf69d0f&Rnd=0.40012703341173705) or other online platforms
* Podcasts | [National Career Development Association](https://ncda.buzzsprout.com/) | [Harvard Business Review IdeaCast](https://hbr.org/podcasts) | [The Muse](https://podcasts.apple.com/us/podcast/the-muse/id1496901188)
* Check resources from Being a Workforce Professional Competency
* Follow relevant people on LinkedIn or Twitter – e.g.
* Vicki Salemi (Career expert for Monster, columnist of "Vicki on Careers")
* Mark Cuban (Businessperson and “shark” on the ABC reality television series Shark Tank)
* Minda Zetlin (author of Career Self-Care: Find Your Happiness, Success, and Fulfillment at Work)
* Rosalind "Roz" Brewer (former CEO of Walgreens Boots Alliance, COO of Starbucks, and CEO of Sam's Club).
 |

The toolkit is a work in progress! If you know of any additional resources for introducing a competency, please email LWBD@labor.ny.gov.

# Self-Assessment for Competency Development

As a vital resource in helping people navigate career paths, Career Advisors emphasize the importance of continuous learning and development. Regular self-assessment is crucial in this unique profession. Here's a simple method to help you track your progress on the learning questions connected to each competency:

–1 No: You do not know the answer after initially reviewing the resources.

+1 Yes: You know the answer to the question.

+2 Yes: You find the answer with your supervisor's help or from a reliable source.

+3 Yes: You find a valuable resource not listed in the available materials.

+4 Yes: You discover and share a new, valuable resource with LWDB@labor.ny.gov.

This approach recognizes the importance of finding answers and understanding the big picture with collaboration with your supervisor and other resources.

### Action Plan

* In your first month, for each competency, how many questions can you answer on your own ("+1 Yes"), and how many require initial research or consultation with your supervisor (" +2 Yes or need clarification")?
* What steps will you take to increase the number of questions you can answer “yes” to in the second month?

By following this comprehensive approach, you can leverage this self-assessment method, actively seek new knowledge, and collaborate with colleagues to become a highly competent Career Advisor.

|  |
| --- |
| **Steps to Increase Your "Yes" Answers!****Become a Knowledgeable and Resourceful Career Advisor!** |
| **Seek Training:** Pursue training opportunities to fill in your knowledge gaps. This will directly address areas where you currently answer "no." |
| **Research Resources:** Explore professional development materials. Actively seeking out valuable resources can earn you a "+3 Yes" if you find something not previously listed. |
| **Connect with Experts:** Collaboration can help you find answers to each other's questions, reducing "no" responses and potentially leading to the discovery of new resources (earning "+3 Yes" or "+4 Yes"). Discuss challenges and share knowledge with other Career Advisors and supervisors. |
| **Track Progress:** Regularly re-evaluate your self-assessment to measure improvement. This allows you to see how your "yes" answers are increasing and identify areas for continued development. |

### Action Plan Template

|  |
| --- |
| **Competency:** |
| **Desired Skills:** |
| **Strengths:** |
| **Constraints and Boundaries:** |
| **End Date: Check Points:** |
| **Learning Plan:** |
| **Check Point 1 Update:** |
| **Check Point 2 Update:** |
| **Debrief or Reflections:**What was planned?What happened?Why did it happen?What can I do better next time?What are my three (3) main takeaways? |

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