Workforce Synergy Forum Resources
Tools for Frontline Staff Training

Creating living documents and procedure manuals that grow with your organization can:

- Provide clarity around staff roles and responsibilities;
- Link and summarize laws, regulations, policies, Training and Employment Guidance Letters (TEGLs), Technical Advisories (TAs), etc.; and
- House instructions for basic but necessary office systems like phones and server file structures.

Yes, this can be time-consuming to build, but once created, they're easy to maintain and update as needed.

Take the initiative as a manager to be a working subject matter expert. I work on what I'm learning. And then I support educating people on the things that I know.
-Dixie Farr, Buffalo and Erie County Workforce Development Consortium, Inc., Deputy Director | dfarr@wdcinc.org

Know your staff and their different learning styles! I create multi-purpose tools – one side with visually appealing and colorful graphics, the other side with black and white text.
-Janelle Williams-Como, Yates County Workforce Development, Supervisor | janelle.williams-como@dfa.state.ny.us

Onboarding could be difficult. Remember that you are doing meaningful, life-changing work!
-Theresa Heary, Women in Government & Civil Society Fellow, placed at NYSDOL | LWDB@labor.ny.gov

Recording
Click "View session recordings" at the top right corner | Search: Synergy Forum – Tools for Frontline Staff Training

Attached Resources:
- Slides
- Orientation Checklist – Yates County
- Supportive Services Chart and Text – Yates County
- Important Links File – Erie County
- Staff self-evaluations – Erie County
- Career Advisor Toolkit External Link

Agenda:
- Tips and Tools from Managers or Supervisors
- Staff Training Ideas
- Toolkits
- Resources

Take this quick survey to help us keep improving the Synergy Forum!

Career Advisor Toolkit

Includes competencies, resources, learning questions, self-assessments for Workforce Innovation & Opportunity Act (WIOA) front-line staff, and a toolkit for supervisors to guide their staff.

Thinking about Revamping Your New Employee Orientation?

Janelle's office uses position-specific Workforce Development Orientation Checklists and signed agreements between trainers and trainees. This is valuable both from a Human Resources perspective and to signify that staff feel comfortable with the training, with plenty of opportunity for questions along the way.
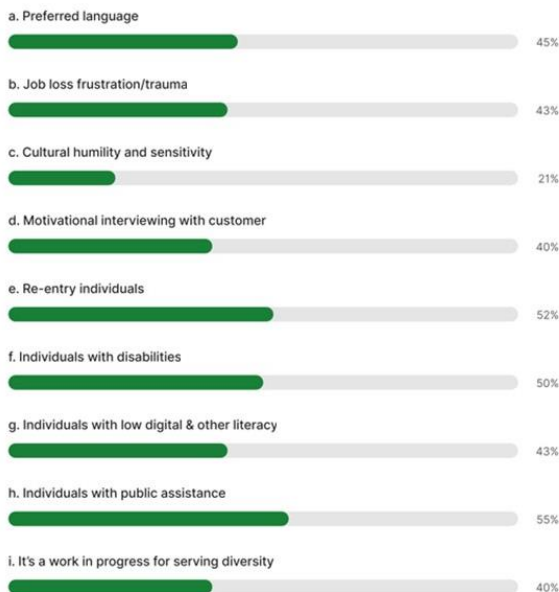
Use people-first principles to develop your staff and empower them to be successful, and positive outcomes will follow.

- How do you introduce yourself and your organization?

- Is there excitement around the opportunity when new staff join?

- Do current staff have good facilitation skills?

- Are your conversations engaging and ongoing?

Staff Development

Do resources prepare you for customers' unique characteristics? (Mark all that apply)

a. Preferred language	45%
b. Job loss frustration/trauma	43%
c. Cultural humility and sensitivity	21%
d. Motivational interviewing with customer	40%
e. Re-entry individuals	52%
f. Individuals with disabilities	50%
g. Individuals with low digital & other literacy	43%
h. Individuals with public assistance	55%
i. It's a work in progress for serving diversity	40%

Take advantage of [The Foundational Career Coach Skills Training,](#) developed and hosted by the Rework America Alliance, available through Workforce GPS, which includes:

- Human resources-based training,

- DEIA training,

- How to help job seekers shift from a victim mindset to an empowered mindset, and

- How to recognize bias in a job description.

Partner with local organizations for staff training. For example:

- Safe Harbor

- Domestic violence prevention

- Counseling and career coaching

- Cultural sensitivity and bias

[Use interactive performance evaluations, including self-evaluations and SMART goals (Specific, Measurable, Achievable, Relevant, and Time-Bound). The Erie County example is attached.](#)

TIPS for Creating Manuals in Microsoft Word: Use heading styles and navigation bar, embed links, and include the date and server file location in the footer.
FREE TOOLS for Building Resources: [Canva](#) | [YouTube](#) | [TED Talks](#) | Social media
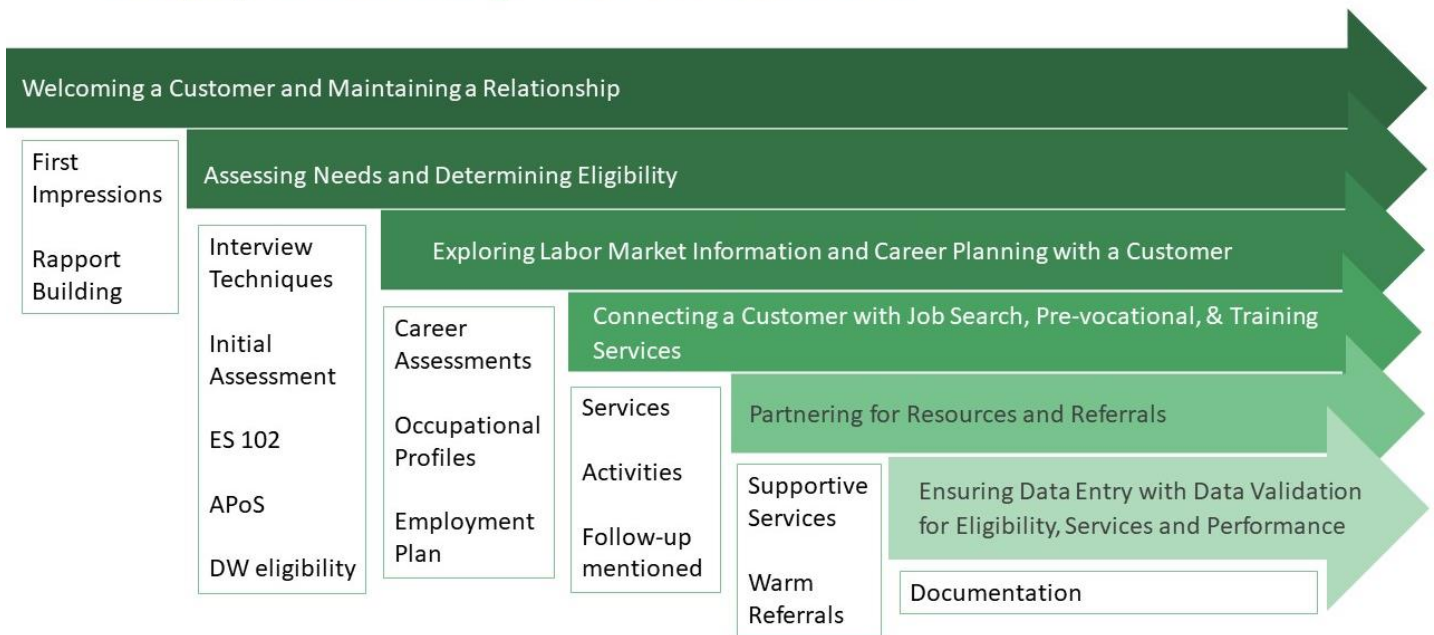
Make the [Career Advisor Toolkit](#) Your Own!

Competencies and Resources for WIOA Title I Adult and Dislocated Worker Program Frontline Staff

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.

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

- Understanding the Workforce System
- Being a Workforce Professional
- Including Everyone

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
- Reaching More Customers and Partners
- Keeping up with the Technology

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

- Welcoming a Customer and Maintaining a Relationship
- Assessing Needs and Determining Eligibility
- Exploring Labor Market Information and Career Planning with a Customer
- Connecting a Customer with Job Search, Pre-vocational, and Training Services
- Partnering for Resources and Referrals
- Ensuring Data Entry with Data Validation for Eligibility, Services, and Performance

Category: √ Learning with a Customer

Welcoming a Customer and Maintaining a Relationship

| First Impressions

Rapport Building | Assessing Needs and Determining Eligibility |

Interview Techniques

Initial Assessment

ES 102

APoS

DW eligibility

Exploring Labor Market Information and Career Planning with a Customer

Career Assessments

Occupational Profiles

Employment Plan

Connecting a Customer with Job Search, Pre-vocational, & Training Services

Services

Activities

Follow-up mentioned

Partnering for Resources and Referrals

Supportive Services

Warm Referrals

Ensuring Data Entry with Data Validation for Eligibility, Services and Performance

Documentation

Important Links in One File for Staff (Attached)

Navigation Panel for Quick Content Access

Take a survey to share topics for future Synergy Forums!

- Pay It Forward
- Give Feedback
- Be a Long-Term Planner

- Share Topic Ideas
- Make the Forum Your Own Learning Space
- Explore Opportunities with Peers

Reach Out to Synergy Forum Facilitators

Janelle Williams-Como is a visionary problem solver known for her ability to think outside the box. In her current role as Supervisor for Yates County Workforce Development, she brings expertise in overseeing temporary assistance employment requirements and maximizing the impact of WIOA programs, facilitating access to resources and opportunities for underserved populations. Previously, Janelle spearheaded initiatives aimed at bridging skill gaps, fostering inclusivity, and driving career advancement. She has implemented innovative and hands-on techniques to hire new workforce staff and train them!
janelle.williams-como@dfa.state.ny.us

Dixie Farr is Deputy Director for the Buffalo and Erie County Workforce Development Consortium, Inc., where she is reimagining the way workforce service is provided. She also serves on the Erie County Conditional Release Commission and Erie County Corrections Specialist Advisory Board. In these capacities, she forges relationships with stakeholders to develop inclusive solution-focused strategies. Dixie is a model modern professional, prioritizing her civic commitments and work-life integration, speaking out for change, and infusing a sense of humor into her work. She is a Buffalo, NY native with an MSW from the University at Buffalo open to share her creative training experiences with at the Synergy Forum. dfarr@wdcinc.org

After 20 years teaching in rural communities, Theresa Heary has turned her attention toward public policy. As a fellow at the Center for Women in Government & Civil Society through the University at Albany, she has immersed herself in WIOA regulations at NYSDOL. Theresa has enjoyed learning about the workforce system through site visits and countless conversations with workforce development leaders throughout NYS. Theresa's teaching expertise and ability to simplify complex information have been invaluable in developing the "Career Advisor Toolkit for Adult and Dislocated Worker Frontline Staff."
LWDB@labor.ny.gov

Throughout her career, Juie Deo has witnessed the transformative power of collaboration. Her passion for sharing blossomed while tutoring organic chemistry, street theater, service-learning, and career counseling in NY, MI, and CA. This journey led her to develop future educators with Teach for India and today, as a social worker, she continues to globally train trainers to build life skills. For over a decade at NYSDOL, Juie has enjoyed building WIOA expertise, explaining the law's intentions and equipping staff with resources. Going farther together for staff training – that's the spirit Juie aspires to embody with this monthly Synergy Forum! juie.deo@labor.ny.gov

Resources from past Workforce Synergy Forums (under the Workforce Synergy Forum filter)

What is the Workforce Synergy Forum?

Mind Full, or Mindful?

Making Challenges into Opportunities

As the leaders of WIOA Adult/DW Programs, we all face similar opportunities and thrive by asking questions, sharing practices, and learning from experts and our peers. Workforce Synergy is a monthly forum dedicated to exploring, developing, and sustaining effective workforce strategies. We will collectively build the synergy we want and need for our workforce system. Leaders are encouraged to attend live for active, real-time collaboration!

Inspired? Questions? Collaborate! LWDB@labor.ny.gov | 518-457-3555

Brought to you by the WIOA Adult/Dislocated Worker Program Leaders and New York State Department of Labor

Slide 1

Workforce Synergy Forum

Making Challenges into Opportunities

1

Slide 2

dol.ny.gov/workforce-professionals-tools (under Workforce Synergy Forum Filter)

FILTER
- Workforce Synergy Forum
- Initial Assessment

REFINE

Keyword

DATE

From
mm/dd/yyyy

To
mm/dd/yyyy

APPLY
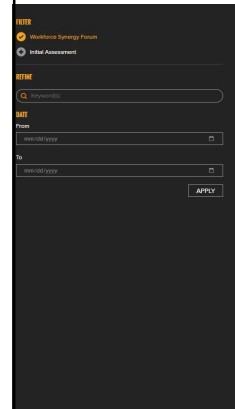
7 results found available within Workforce Synergy Forum ■ Clear All

Workforce Synergy Forum
Mental Health Supports in Employment Services
Includes recording and resources from survey results, chat, and discussions.
▸ DOWNLOAD

Workforce Synergy Forum, Initial Assessment
Taking Care of Your Mental Health During and After Job Search
Includes tips and resources for customers and staff to support their mental health. Modify the sheet
▸ DOWNLOAD

Workforce Synergy Forum
Basic Skills Assessments and Services
Includes recording and resources from survey results, chat, and breakout room discussions
▸ DOWNLOAD

Workforce Synergy Forum
Strategies for Adult Priority of Service
Includes recording and resources from survey results, chat, and breakout room discussions

Synergy Forum Resources
Recordings
Slides
Polls
Summary
Handouts
Takeaways

All at One Place!

2

Slide 3

Be Seen in Green: Mental Health Awareness Month

3

Slide 4

Workforce Synergy Forum Resources
Mental Health Supports in Employment Services

Our community services partnerships and a resource packet with all local service providers are invaluable to providing mental health support.
– Sara Canfield, Principal Employment & Training Counselor, Schenectady County Connects

Connect to your existing resources. If partnerships don't already exist, let's build them! There's a Single Point of Access (SPA) for mental health resources in each county. That's a good place to start.
– Andy Sink, Director of NYESS Employment Policy, NYS Office of Mental Health

Embed mental health in the culture of our Career Centers and begin the conversation about it with jobseekers as soon as they walk through the door. – Alexx Sicilia, NYSDOL

When we prioritize mental health as a daily habit, we can grow beyond self-care to community care and shift these practices into collective action. – Jule Deo & Meg Botelin, NYSDOL

Recording
Click: "View session recordings" at the top right corner | Search: Mental Health Supports in Employment Services

Attached Resources:
▸ Taking Care of Your Mental Health During Job Search for Customers
▸ Resources and ideas for all

Agenda:
• Practical ways to refer customers to mental health supports
• Building a network for mental health services
• Ways to support staff in the journey

We are seeking support from two local staff to review the draft Supportive Services Brief, which includes policies for the delivery of quality local supportive services.
Email the WIOA Admin Office if you're interested!

Download and Modify the "Taking Care of Your Mental Health During and After Job Search" Sheet and Share it with All Customers
Included sections: Maintain Routine | Stay Connected | Manage Stress | Be Inspired | Seek Professional Help While Waiting for Therapy to Begin | Crisis Help

Emotional On-going Support
Ideal when you're feeling stressed, anxious, lonely, or need someone to talk to. Warmline volunteers and professionals offer emotional support and a listening ear in a non-judgmental space. Warmlines provide support and resources, but they are not designed to support immediate crisis intervention.

NAMI HelpLine 1-800-950-NAMI (6264)
Text "HELPLINE" to 62640
Go to NAMI.org/help to chat with a specialist!
Warmline.org to find warmline professionals
OkeySo.org for young adults

MindApps.org database from Harvard includes apps to manage and support mental health.
Job Accommodation Network (Askjan.org) provides free resources on requesting accommodations in the workplace for people with disabilities.

Continue to explore ways your organization can foster a culture of care that supports every member

Caring for Others is Possible When We Care for Ourselves Too!
Participate in Frequent, Scheduled, Free/Low-cost Training for Staff and Leaders (attached)
Allocate funds for staff development!
Examples of Trauma Responsive Language (attached)

Without experiencing the storm, how can you see the rainbow?
No one can succeed easily.
Jackie Chan

The level of collective courage in an organization is the absolute best predictor of that organization's ability to be successful.
Brené Brown

We cannot change what we are not aware of, and once we are aware, we cannot help but change.
Sheryl Sandberg

Always treat your employees exactly as you want them to treat your best customers.
Stephen R. Covey

All difference is, therefore, due to mind. All that we see, we project out of our own minds.
Sw. Vivekananda

Normal is nothing more than a cycle on a washing machine.
Whoopi Goldberg

Mental Health Support for Employment Services Staff, Leaders, and Organizations (attached)

Use of Release of Information Form

Does your staff or you use the Release of Information Form from Technical Advisory 19-1? (select all that apply)

1. I haven't seen this form before. 66%
2. We use this form (type in chat for which partner referrals). 23%
3. We have modified the form to make it more applicable (type in the modifications made). 9%
4. We will start using this form more (type in chat what is useful about this form). 4%

Utilize the Release of Information form based on Technical Advisory #19-01.

If you have modified the form please share your form with LWDB@labor.ny.gov for all to learn.

Obtaining consent from the customer for sharing their information is critical.

Webinar Recording: Making Referrals to Workforce Partners (Password: DEWSweb123)

dol.ny.gov/workforce-professionals-tools

(under Workforce Synergy Forum Filter)

4

Slide 5

Taking Care of Your Mental Health During and After Job Search

Maintain a Routine

Structure your day – Set regular times for waking up, going to sleep, meals, exercise, and job search activities. This will create a sense of normalcy and reduce stress.

Schedule self-care – Make time for activities you enjoy, like hobbies, spending time with loved ones, or relaxing in nature.

Manage Stress

Practice relaxation – Deep breathing, meditation, and yoga can all help reduce stress.

Exercise regularly – Physical activity improves your mood and boosts your energy levels.

Limit caffeine and alcohol – Substances can worsen anxiety and sleep problems.

Challenge negative thoughts – Pay attention to self-talk; replace negative thoughts with realistic and positive ones.

Be Inspired

Use Peak Energy Time – Schedule job search tasks for part of the days when you feel most focused and productive.

Measure Progress – Set goals & track them! Celebrate milestones and use a fun system (e.g., a colorful bullet journal).

Encourage Yourself – Set up small and larger rewards for reaching big and small goals, to stay motivated.

Find Cheerleaders – Identify people to support you through setbacks and celebrate your efforts with them.

Monitor Mental Health Symptoms

Recognize that changes in sleep patterns, mood swings, loss of interest, changes in appetite, social withdrawal, changes in concentration, fatigue, headaches, and other factors related to the job search process and chronic stress may bring on or exacerbate previously existing symptoms and identify coping strategies ahead of time.

- Create a mental wellness plan (suggested example: https://dmh.mo.gov/media/pdf/wrap-work-recovery-work).
- Include a crisis plan and notify the support system of your plan.

Emotional On-going Support

Ideal when you're feeling stressed, anxious, lonely, or need someone to talk to. Warmline volunteers and professionals offer emotional support and a listening ear in a non-judgmental space. Warmlines provide support and resources, but they are not designed to support immediate crisis intervention.

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Text "HELPLINE" to 62640
Go to NAMI.org/help to chat with a specialist!
Warmline.org to find warmline professionals
Okay2o.org for young adults.

MindApps.org database from Harvard includes apps to manage and support mental health.

Job Accommodation Network (Askjan.org) provides free resources on requesting accommodations in the workplace for people with disabilities.

Taking Care of Your Mental Health During and After Job Search

Seek Professional or Other Help

Talk to friends and family – Having a strong support system can be invaluable during a stressful time. Let them know what you're going through and how they can help.

Join a support group – Many organizations offer support groups. Connect with others who understand your challenges and can offer advice and encouragement.

A professional, such as a therapist, can provide you with strategies for managing stress, anxiety, depression, and more.
How to Seek Help? Options:
- Findtreatment.gov
- Office of Mental Health Program Directory (omh.ny.gov)
- County Mental Health Single Point of Access Coordinator & Local Mental Hygiene Departments (clmhd.org)
- Findhelp.org free or reduced-cost resources like food, housing, financial assistance, health care, and more
- 211.org connects you to expert caring help. Every call is confidential.

Available Local Organizations:
_____
_____
_____
_____

While Waiting for Therapy to Begin

Schedule an appointment with your doctor – Discuss symptoms with your doctor to rule out medical causes.

Practice bibliotherapy – Read self-help books on managing anxiety, depression, etc.

Use Counseling Tools & Apps – Download a phone app with tools for managing mental health. Suggested examples: MindApps.org | ACT Companion App.

Engage in Mentorship – Find a mentor for guidance and support.

Join Support/Social Groups – Join a support group or recreational activity group focused on your interests. Examples: NAMI naminys.org | Programs offered through health insurance.

Crisis Help

Ideal if you're experiencing a mental health crisis, feeling overwhelmed, unsafe, or have thoughts of suicide, a crisis hotline is the best resource. Trained counselors are available 24/7 to provide immediate support, intervention, and resources to help you navigate the crisis.

988lifeline.org — Call, text, or chat for 24/7 support: 988
Domestic Violence Hotline.org — Call 1-800-799-SAFE (7233), Chat, Text "START" to 88788

Taking care of your mental health is an investment in your overall well-being and your success in your job search and career.

You got this!

This sheet includes helpful suggestions only. Please work with licensed professionals, if needed.

A sheet to give to customers

dol.ny.gov/workforce-professionals-tools (under Workforce Synergy Forum Filter)

Slide 6

June Synergy Forum

Possibilities in Youth Program Models

June 25, 2:30 pm

Broome, Chemung, Schuyler, Steuben Counties

Slide 7

Shape the Synergy Forum

Pay It Forward
Give Feedback
Share Topic Ideas
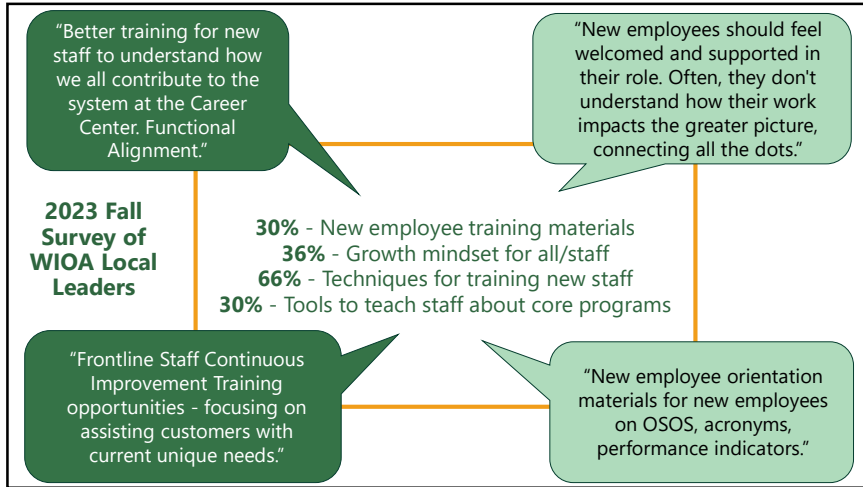## Make It Your Own Space

tinyurl.com/synergy-forum-feedback

Slide 8

Tools for Frontline Staff Training

WIOA

Mind Full, or Mindful?

Making Challenges into Opportunities

Slide 9

"Better training for new staff to understand how we all contribute to the system at the Career Center. Functional Alignment."

"New employees should feel welcomed and supported in their role. Often, they don't understand how their work impacts the greater picture, connecting all the dots."

2023 Fall Survey of WIOA Local Leaders

30% - New employee training materials
36% - Growth mindset for all/staff
66% - Techniques for training new staff
30% - Tools to teach staff about core programs

"Frontline Staff Continuous Improvement Training opportunities - focusing on assisting customers with current unique needs."

"New employee orientation materials for new employees on OSOS, acronyms, performance indicators."

9

Slide 10

Your Input Matters: Slido Poll

Open a New Browser Window
Go to Slido.com and Enter #Synergy

Or
Scan the QR Code with Phone

10

Slide 11

What does your onboarding and staff development program include? (Mark all that apply)

a. Compiled links, procedures, forms, and charts for new staff — 60%
b. Detailed descriptions of duties, outcomes, and expectations — 56%
c. Annual anticipated calendar of events and activities — 16%
d. Strategic development with training plans for each staff — 9%
e. Job shadowing and practice sessions — 67%
f. Engaging team and professional workshops and tours — 44%
g. Analysis of customer trends to define staff learning needs — 9%
h. Peer, supervisor, and customer feedback — 56%

Slido Poll

Open a Browser Window
Go to Slido.com
Enter #Synergy

Or

Scan the QR Code
with Phone

11

Slide 12

Did you feel like your onboarding provided the resources and time you needed to meet customer needs?

Yes - 18 votes — 38%
No - 29 votes — 62%

Slido Poll

Open a Browser Window
Go to Slido.com
Enter #Synergy

Or

Scan the QR Code
with Phone

12

Type Your Top Five On-Boarding Practices in Chat

a. Compiled links, procedures, forms, and charts for new staff
b. Detailed descriptions of duties, outcomes, and expectations
c. Annual anticipated calendar of events and activities
d. Strategic development with training plans for each staff
e. Job shadowing and practice sessions
f. Engaging team and professional workshops and tours
g. Analysis of customer trends to define staff learning needs
h. Peer, supervisor, and customer feedback

Type in chat the alphabets of top five important practices in onboarding

13

WORKFORCE SYNERGY FORUM

Yates County
Janelle Williams-Como

14

SUPPORTIVE SERVICES Process chart

Example from Yates County to assist visual learners
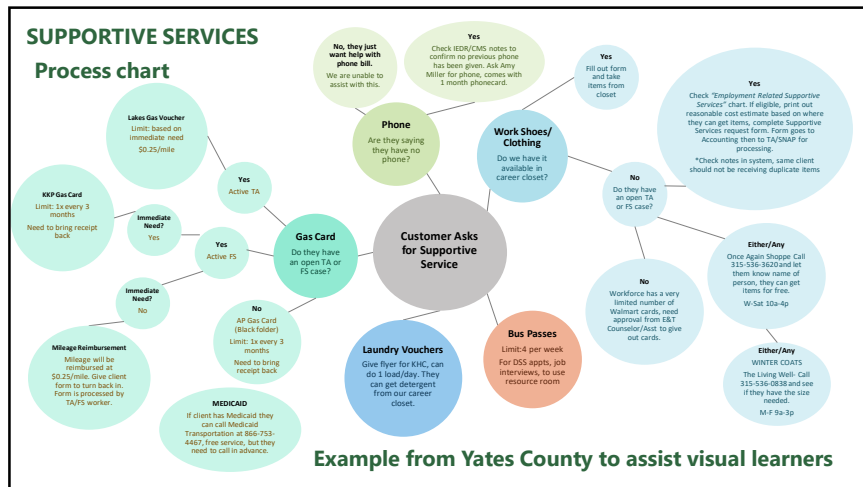
15

Supportive Services procedures example from Yates County to assist verbal learners

Gas Cards
•Check and see if client has an open TA or FS case (not "pending" status).

•If they do not, they can have an AP Gas card 1x every 3 months, and they need to bring the receipt back to Workforce. These cards are in the black folder.

•If they have an active TA case, they should be given a Lakes Gas Voucher. Limit: Based on immediate need. Voucher amount should be calculated at the rate of $0.25/mile.

•If they have an active FS case, and the need is immediate, they can have a KKP Gas Card 1x every 3 months, and they need to bring the receipt back to Workforce. These cards are in the KKP folder. If the need is not immediate, they should be provided with the Mileage Reimbursement form. Mileage will be reimbursed at $0.25/mile. Give the client the form to turn back in, and the form will be processed by the TA/FS worker.

Medicaid Transportation
•If client has Medicaid, they can call Medicaid Transportation at 866-753-4467. This is a free service, and they need to contact ahead of time to get transportation.

Bus Passes
•Available for DSS/WFD appointments, job interviews, and to use the resource room. They are not given out for medical appointments unless the appointment is to get exemption paperwork completed for TA/WFD. Limit: 4 passes per week.

Laundry Vouchers
•Give flyer for KHC. They can do 1 load of laundry per day. They can get detergent pods from our career closet (need to fill out career closet form). We no longer give out laundry vouchers to other places.
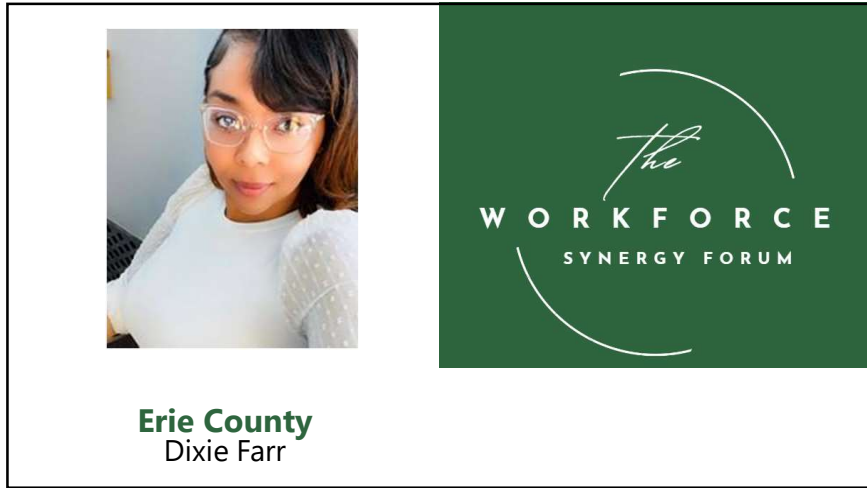
Work Shoes/Clothing
•Check and see if we have the requested items available in the Career Closet. If we do, fill out the form and take the items from the closet. Form goes to WFD front desk.

•If we do not have the items in the closet, check to see if they can get items from The Once Again Shoppe. They would like us to call and give them the name of the person we are sending. Their number is 315-536-3620, and their hours are Wed-Sat 10am-4pm.

•If the person is looking for a winter coat, call The Living Well and see if they have any in an appropriate size. Their number is 315-536-0838 and their hours are M-F 9am-3pm.

•If none of these options are viable, find out if they have an open (not "pending" status) TA or FS case. If they do not, workforce has a very limited number of Walmart cards, but you will need to get approval from E&T Counselor/Assistant to give out a card.

•If they do have an open TA or FS case, check the "Employment Related Supportive Services" chart. If eligible, print out a reasonable cost estimate based on where they can get the items, and complete the Supportive Services request form. The form then goes to Accounting, then to TA/SNAP for processing. *Check notes in the system, the same client should not be receiving duplicate items.

Phones
•Check IEDR and WTWCMS notes to make sure that the person has not been previously provided with a phone. If they have not had a phone previously, ask Amy Miller for a phone. They are TrackFones and come with a 1-month service card. After this, the person needs to pay for phonecards on their own.
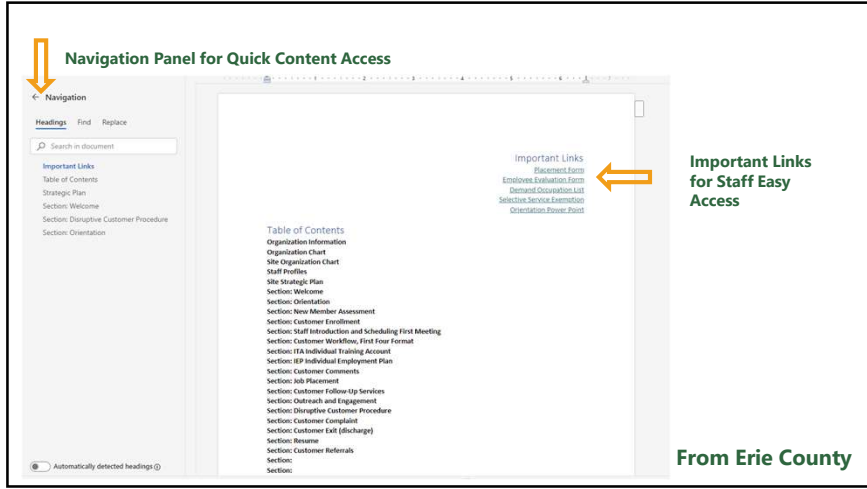
16

Erie County
Dixie Farr

the WORKFORCE SYNERGY FORUM

17

Workforce Development Orientation Checklist

From Yates County

18

Navigation Panel for Quick Content Access

Important Links for Staff Easy Access

From Erie County

19

Knowing the Goals Helps Navigate the Steps

20

Enrollment Process

Flow Charts are Good Guides

Orientation	Intake	Administrative Handling	Counselor Outreach	First Meeting
ANN	DEBBIE/EUNICE	SHARON	E&T / YCN	E&T / YCN

- Complete orientation 10a or 2p
- Receive customers who complete orientation, review documentation and request any additional needed for APOS (ID Badges with Willie/Ann)
  - Complete OSOS data entry and transfer customer folder to Sharon (1 Business Day Max)
- Record enrollment in excel sheet and assign for employment services (Same day assignment)
- Contact to set up first appointment. Call, if no answer VM and email.
  - Corresponding OSOS comment (1 Business Day Max)
- First Appointment
  - Review and verify Customer Details Page, special attention to objective tab.
  - Complete tabs within the Comp Assessment
  - Collecting any supporting enrollment documentation
  - OSOS comment capturing what was performed and the next steps. Proceed with service (3-4 Business Day Max)

Self-Directed Job Seeker

SELF-SERVICE

21

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b. Enrolling Activity Validation

Orientation Workshop (In-person and Virtual Attendance Options)
Prior to orientation, you should prepare the learning space for your guests, and ensure your presentation is ready. *Always be prepared for technology failures Orientation PP (To be updated Create link and add slide about selective service, check-in systems, BETC ID and satisfaction survey, and staff photos/titles)*

1. Introduce yourself and confirm attendance
2. Verify that your facilitation is adapted to the audience
3. Review the new member packet
4. Packet Q & A
5. Facilitate content
6. Center Tour/Staff Introductions
7. Transfer attendance sheet to Office Manager for record keeping and customers to Data Entry Professionals for new member assessment

Good Speaker Skills-Ted Talk
Chapter 16. Group Facilitation and Problem-Solving | Section 2. Developing Facilitation Skills | Main Section | Community Tool Box (ku.edu)

Facilitation Audit Form-Link

Providing detailed steps helps to guide and safeguard troubleshooting

22

Buffalo & Erie County Workforce Development Consortium, Inc.

May 22, 2024

Employee Performance & Development Self-Evaluation

Start now

23

Buffalo & Erie County Workforce Development Consortium, Inc.

May 22, 2024

Employee Performance & Development Self-Evaluation

Start now

16. Adherence to Policy: Adherence to professional policies and procedures as set by the agency and additional regulatory bodies, that are subject to change. *
1-Results are generally unacceptable and require immediate improvement.
2-Performance is deficient in certain areas: improvement is necessary.
3. Competent and satisfactory levels of performance.
4. Performance exceeds job requirements.
5-Performance is exceptional and consistently exceeds requirements in all areas.

1	2	3	4	5

17. Why *

Enter your answer

Employee evaluations that beings with a self-evaluation which includes wins and goals

18. Interpersonal Relationships: The employee is willing and demonstrates the ability to cooperate, engage, and communicated with coworkers supervisors, and workforce partners. *
1-Results are generally unacceptable and require immediate improvement.
2-Performance is deficient in certain areas: improvement is necessary.
3. Competent and satisfactory levels of performance.
4. Performance exceeds job requirements.
5-Performance is exceptional and consistently exceeds requirements in all areas.

1	2	3	4	5

19. Why *

Enter your answer

24

25

26

27

28

Slide 29

Questions from Zoom Registration to:
Facilitators & Audience

"Keeping up with staff changes and turnover makes training difficult. Suggestions?"

29

Slide 30

Questions from Zoom Registration to:
Facilitators & Audience

"Has anyone developed a WIOA acronym "cheat sheet" to explain concepts like IA, IEP, WDB, etc.?"

30

Slide 31

Do resources prepare you for customer's unique characteristics? Yes, for: (Mark all that apply)

a. Preferred language
b. Job loss frustration/trauma
c. Cultural humility and sensitivity
d. Motivational interviewing with customer
e. Re-entry individuals
f. Individuals with disabilities
g. Individuals with low digital & other literacy
h. Individuals with public assistance
i. It's a work in progress to serve diversity

Slido Poll

Open a Browser Window
Go to Slido.com
Enter #Synergy

Or

Scan the QR Code
with Phone

31

Slide 32

Do resources prepare you for customers' unique characteristics? (Mark all that apply)

a. Preferred language — 45%
b. Job loss frustration/trauma — 43%
c. Cultural humility and sensitivity — 21%
d. Motivational interviewing with customer — 40%
e. Re-entry individuals — 52%
f. Individuals with disabilities — 50%
g. Individuals with low digital & other literacy — 43%
h. Individuals with public assistance — 55%
i. It's a work in progress for serving diversity — 40%

Slido Poll

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Or

Scan the QR Code
with Phone

32

Women in Government Fellowship
Theresa Heary

33

Toolkit for Career Advisors!

34

Toolkit for Career Advisors!

Career Advisors are public-facing frontline staff who do the vital work of connecting job-seekers with sustainable careers.

They are also known as Career Counselors, Job Counselors, Career Navigators, Job Advisors, and the like.

35

This toolkit includes:

- Questions Career Advisors need to consider

- Resources to answer some of the questions

- Self-assessment and Action plan ideas

36

Slide 37

How did we make the Career Advisor Toolkit?

Slide 38

We Talked with You!

- 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.

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

Slide 39

We Reviewed Workforce Professional Training Curricula

Center for Credentialing & Education

Cornell University

The British Council

Markle, Rework America Alliance

University of California, San Diego

National Council for Workforce Development

Certified Workforce Development Professional

San Jose State University

Workforce and Career Development Certification

Certified Workforce Development Professional Certification

National Collaborative on Workforce and Disability

University of New Jersey, Rutgers, John J. Heldrich Center for Workforce Development: Working Ahead

US Department of Labor: Career One-Stop Website Toolkit

National Association of Workforce Development Professional

Slide 40

It was and will be a collaboration.

Slide 41

3 Categories

∞ Setting the Stage
√ Learning with a Customer
+ Advancing Impact

12 Competencies within 3 Categories

41

Slide 42

Category:

∞ Setting the Stage

Three Competencies:
- Understanding the Workforce System
- Being a Workforce Professional
- Including Everyone

42

Slide 43

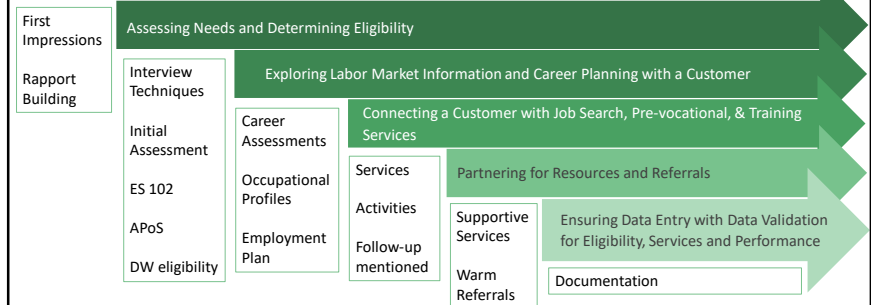Category:

√ Learning with a Customer

Six Competencies:
- Welcoming a Customer and Maintaining a Relationship
- Assessing Needs and Determining Eligibility
- Exploring Labor Market Information and Career Planning with a Customer
- Connecting a Customer with Job Search, Pre-vocational, and Training Services
- Partnering for Resources and Referrals
- Ensuring Data Entry with Data Validation for Eligibility, Services and Performance

43

Slide 44

Category: √ Learning with a Customer

Welcoming a Customer and Maintaining a Relationship

First Impressions

Rapport Building

Assessing Needs and Determining Eligibility

Interview Techniques

Initial Assessment

ES 102

APoS

DW eligibility

Exploring Labor Market Information and Career Planning with a Customer

Career Assessments

Occupational Profiles

Employment Plan

Connecting a Customer with Job Search, Pre-vocational, & Training Services

Services

Activities

Follow-up mentioned

Partnering for Resources and Referrals

Supportive Services

Warm Referrals

Ensuring Data Entry with Data Validation for Eligibility, Services and Performance

Documentation

44

Slide 45:

Category:

+Advancing Impact

Three Competencies:
- Leveraging Business Services
- Reaching More Customers and Partners
- Keeping Up With the Technology

45

Slide 46:

Let's imagine you are a supervisor of a brand-new Career Advisor.

How can you use this toolkit?

46

Slide 47:

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
4. Who are the experts in my office I can learn from and collaborate with?
5. Who are the primary customers the workforce development system serves?
6. What do local staff and NYS Department of Labor staff do differently?
7. 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
  - Voices of Experience Videos (WorkforceGPS)
  - WIOA 101 Webinar (Password: DEWSWeb123)
- Topic-specific search:
  - Critical federal Training & Employment Guidance Letters (TEGL) and regulations
  - NYSDOL Technical Advisories and Program Guidance Letters
- NYSDOL Workforce Professionals Programs & Tools webpage

47

Slide 48:

Being a Workforce Professional
Helps you to understand your responsibilities and model professional behavior

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

Continual Professional Development
8. What resources can I find to stay up-to-date on workforce trends, credentials, and best practices?
9. What transferable skills am I building, and how can I leverage them for my skill development and customer support?

Read the Qs

48

Slide 49

Let's imagine you are a supervisor

You

Your Staff

You have a staff member who works well with customers but is not motivated to maintain documents or records. What would you do?

49

Slide 50

Help staff with poor record keeping

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

- Understanding the Workforce System
- Being a Workforce Professional
- Including Everyone

+ **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
- Reaching More Customers and Partners
- Keeping up with the Technology

You, a Thriving Career Advisor!

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

- Welcoming a Customer and Maintaining a Relationship
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Slide 51

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51

Slide 52

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?
6. How and where do I record customer information?
7. How and where do I keep and manage customer notes?
8. How do I enter data for eligibility, and ensure that all the services the customer receives are recorded along with performance?
9. 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 | Goals and Reports
- Indicators of performance e-learning modules (WorkforceGPS)
  Employment rate, 2nd and 4th quarter   Measurable skills gain
  Median Earnings   Credential attainment
- Adult Priority of Service Technical Advisory #23-01 | APoS Resources
- Data Element Validation (DEV) Chart | DEV Technical Advisory #23-03 | State Monitoring Guides
- DEWS.WebEx, "view sessions recording" on top right and search "OSOS"
- OSOS Guides (Programs & Tools Webpage: JobZone, OSOS & REOS filter)
  Creating a Basic Customer Record   Recording an Initial Assessment
  Employability Profile OSOS Guide   L1 OSOS Selected Enrolling
  Documenting DW Status   Activity
  Dislocated Worker OSOS Checklist   L2 OSOS Services Definitions
  Comprehensive Assessment &   Performance
  Supplemental   Measures/Outcomes
  Attachments Tab   Job Matching Guide
  Language Services   SSAN Model of case notes
  O*Net Titles   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

52

Slide 53

Let's imagine you are a Career Advisor

You

Your Customer

You have a customer with plenty of skills from managing a home, but no work history.
What would you do?

53

Slide 54

Help a customer with many skills but little work history

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

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54

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55

Slide 56

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	Pre-vocational and Basic Skills
Resume creation or update	Digital literacy skills
Interviews	Work readiness skills
Workshops	Virtual Reality
Networking and online job search	Transitional jobs/Work Experience
Online presence and social media	Tryouts
Virtual Career Center	Financial Literacy
Tax credit programs	**Occupational Skills Training**
Educational Services	Apprenticeship/pre-apprenticeship
High school equivalency (GED, National External Diploma)	On-the-job or customized training
	Incumbent worker training
Integrated education and occupation	Individual Training Account
English as a Second Language	Free online training

- Job Search Support:
  - Career Center Events: Virtual workshops on resume development, interviewing, social media usage, career fairs, micro-credentials, and more
  - Job Search Tips (CareerOneStop)
  - Find Career You Love Guides and Job Search tools (dol.ny.gov)
  - Practice Interviewing: | Interview Stream

- Pre-vocational and Basic Skills:
  - SUNY Attain Labs
  - Instructional videos for Excel, math, tech
  - Improve typing skills
  - NorthStar for basic and advanced digital skills | Webinar Part 1 | Part 2

- Training Services:
  - Eligible Training Provider List
  - Apprenticeship Overview | Active Sponsors | Current Recruitments

56

Slide 57

Let's imagine you are a supervisor

You

Customer

You notice an increase in English as Second Language (ESL) customers.
What would you do?

57

Slide 58

Help for staff with increased ESL customers

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

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58

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59

Slide 60

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

5. How do I create relationships and network with other community agencies and potential partners? How do I build collaborative relationships and manage partnerships?
6. What are the needs of these partners and the organizations they are affiliated with?
7. How do I identify a range of community resources (people, places, things, and money) that can assist customers?
8. Many of the people I meet will need additional services. What other services can I refer them to?
9. How can I build collaborative relationships between customers and organizations/partners in the community providing the services they need?
10. 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: 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) (Note that the number of local boards and names of agencies in NYS are different)

60

61

We need to keep learning!

Self-Assessment Action Plan

62

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
6. 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:
7. 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 (Iowa Workforce Development)
- Mindset | Understanding Intergenerational Trauma Vital for Career Professionals | Steps to provide trauma-informed career development | Trauma-Informed | 8 Dimensions of Well-Being and Values
- Initial Assessment Webinars (Password: DEWSweb123):
  - Initial Assessment Webinar Part 1: Eligibility
  - Initial Assessment Part 2: Services
- Your local area may have different forms with the same content:
  - ES 100 | Career Services Eligibility Survey (ES102) | ES102 Staff Guide
  - Basic Skills Assessment
  - Job Search Survey
- Eligibility determinations:
  - APoS Technical Advisory #23-01
  - Eligibility and Adult Priority of Service Matrix
  - Program Guidance Letter #22-01 DW eligibility
  - Income Eligibility Guidelines
  - Check Data Entry and Validation Competency of this toolkit
- Local Expertise:
  - Follow-up policy
  - Local Initial Assessment forms
  - *(Add your local resources)*

63

Only the users of this toolkit can keep it functional!

Let us know if you find new resources or have updates.
LWDB@labor.ny.gov

64

"Looking for new ways to train seasoned staff "

Questions from Zoom Registration to: Facilitators & Audience

Slide 65:

"Is there a training giving a general overview of DEWS? To explain what we do to someone who is brand new."

Questions from Zoom Registration to: Facilitators & Audience

Slide 66:

"Tips for making room in your schedule to train new staff"

Questions from Zoom Registration to: Facilitators & Audience

Slide 67:

Questions from Zoom Registration to: Facilitators & Audience

"What is the best streamlined way to update and know when to replace and use the most current forms? "

Slide 68:

Questions from Zoom Registration to: Facilitators & Audience

"How have other orgs tracked and reported customer experiences effectively?"

Shape the Synergy Forum Now!

Pay It Forward
Give Feedback
Share Topic Ideas
Make It Your Own Space

Take the Quick Survey NOW!
tinyurl.com/synergy-forum-feedback

69

One challenge or opportunity you experienced this year at the Career Center.

Type in Chat

70

Tools for Frontline Staff Training

WIOA

Mind Full, or Mindful?

Making Challenges into Opportunities

71

Topic	Details	Resources	Trainer	Signatures
Computer Programs	o Email (set signature) o Share Calendar o WFD Room Calendar o Log into NY.gov o OSOS o IEDR o SkillUp o WMS o YC Intranet o Equipment for Zoom/Webinars o Timeclock o Coursera o Northstar Digital Literacy o WFD Facebook page o Canva o PosterMyWall o FLWIB website login			
Front Desk	o Hours of Operation o Phones o Tracking Customers o Reserving Rooms o Form locations o Clothing Closet o Gas Cards o Laundry Vouchers o Job Leads o Code of Conduct Forms	9am – 4pm Daily Logs: I/Workforce/Daily Logs Outlook: Yates.sm.Employment.Unit I drive I/Workforce/Resource Room Code of Conduct		
Misc	o Break Room o Scanning/Faxing on Regular Copier o Color Copier o Workforce website o Facebook page o Time Studies o Keys/Front Door Code	Code: XXX		

Revised 5/21/24 JWC   I:\Workforce Development\WIOA Adult & DW Orientation Template

	o LaserFiche scanning o How to get credit card o How to reserve county vehicle	Computer in Accounting Dept I:\DSS & Yates County Policies\DSS Procedures\Procedures\Credit Card Policy I:\WORKFORCE DEVELOPMENT\Central Garage Vehicle Registration Form		
Department Info	o Breaks/Lunch o Email address o Business Cards o IDP schedule and put on calendar o DSS Staff Meetings o Sick Line/Supv cell	Sick Line:		
Phones	o Work Cell o VM setup o Forwarding/Transferring calls o Phone list for dept			
WIOA ITA	o Who is eligible? o What programs are eligible? o What schools are eligible? o ES100, ES101, ES102 forms o Training Workbook o OSOS Initial Data Entry o OSOS Activities o Follow Up Timeframes o When they finish o After finishing			
WIOA OJT	o Business Vetting o DOL Due Diligence o Contract o Initial Paperwork o Reconciling paystubs o Requesting payments			
WIOA Upgrade OJTs	o Make sure getting 10% increase o Rest is same as regular OJT			
BSR	o Job Leads o Facebook page postings o Business After Hours			

	o Manufacturing HR group?			
	o Chamber of Commerce			
	o EDC- Steve G			
	o FLCC- Todd & Pat			
	o FLCC Room Orientation			
	o FLCC Classes			
OSOS	o Entering WFD Activities			
	o New Customer Data Entry			
	o Business Activities			
TANF Orientation	o PowerPoint			
	o Exempt Plans			
	o Employable Plans			
	o Data Entry			
	o Emailing DOL Workshop info			
	o Life Skills Classes			
	o Forms in GED Room			
Meetings	o DSS monthly mtg			
	o FLWIB monthly mtg			
	o Departmental mtgs			
IEDR	o How to look up case notes			
	o How to look up documents			
WMS	o How to find CIN/DOB/Case #			
	o How to log on and get to menu			

1) How do you train your staff?
    A. Implementing Conventional Onboarding that also braids in dynamic learning activities
        a. HR Onboarding
        b. Understanding the system; Agency and workforce partners
        c. Site Orientation; Office, staff introduction, ID, and operations
            i. **Employee Evaluations**
        d. **Customer Experience**
        e. **Strategic Plan**
        f. Procedure Manual
            i. Lecture
            ii. Role Play
            iii. Shadowing
            iv. **Game(challenges)/Competition w/ rewards of value**
            v. **Supervision**
            vi. Resources
            vii. Flowcharts
            viii. **Expert to Expert(staff to staff)**
        g. Professional Development
            i. **Competency: culture, individuals with disabilities, self-care, trauma informed, language line**
            ii. **Staff Moral: Decompress, Reinvest**
2) If you had more time what you would have liked to do for staff training
        a. Partner tours and engagement
        b. Coaching, because coaches practice with the team, and see performance when they play
        c. Starting with placement services and advancing to ITA services
        d. Policy and data study groups

Important Links for easy access
Navigation panel for quick content access

Public Link

Knowing the goal helps navigate the steps

Workforce Opportunity Center
Strategic Plan
Program Year 24/25

Table of contents:
1. WIOA Performance Goals
2. Outreach & Engagement
3. Training
4. Employment
5. Aim Higher Youth Workforce Program
6. Square One Justice Impacted Workforce Program

WIOA Performance Goals

ERIE COUNTY			
	Adult	Dislocated Worker	Youth
		2023	
TARGET			
Employment Rate 2nd Quarter After Exit	61.0%	57.0%	60.5%
Employment Rate 4th Quarter After Exit	62.0%	59.0%	59.5%
Median Earnings 2nd Quarter After Exit	$6,000	$7,100	$3,100

Header

Flow charts are good guides

Enrollment Process

Orientation	Intake	Administrative Handling	Counselor Outreach	First Meeting
ANN	DEBBIE/EUNICE	SHARON	E&T / YCN	E&T / YCN

- Complete orientation 10a or 2p

- Receive customers who complete orientation, review documentation and request any additional needed for APOS
(ID Badges with Willie/Ann)
  - Complete OSOS data entry and transfer customer folder to Sharon
(1 Business Day Max)

- Record enrollment in excel sheet and assign for employment services
(Same day assignment)

Self-Directed Job Seeker

SELF-SERVICE

- Contact to set up first appointment. Call, if no answer VM and email.
- Corresponding OSOS comment
(1 Business Day Max)

- First Appointment
- Review and verify Customer Details Page, special attention to objective tab.
- Complete tabs within the Comp Assessment
- Collecting any supporting enrollment documentation
- OSOS comment capturing what was performed and the next steps. Proceed with service
(3-4 Business Day Max)

Back to page 1

Providing details steps helps to guide and safeguard troubleshooting

b. Enrolling Activity Validation

Orientation Workshop (In-person and Virtual Attendance Options)
Prior to orientation, you should prepare the learning space for your guests, and ensure your presentation is ready. *Always be prepared for technology failures Orientation PP <mark>(To be updated Create link and add slide about selective service, check-in systems, BETC ID and satisfaction survey, and staff photos/titles)</mark>

1. Introduce yourself and confirm attendance
2. Verify that your facilitation is adapted to the audience
3. Review the new member packet
4. Packet Q & A
5. Facilitate content
6. Center Tour/Staff Introductions
7. Transfer attendance sheet to Office Manager for record keeping and customers to Data Entry Professionals for new member assessment

Good Speaker Skills-Ted Talk
Chapter 16. Group Facilitation and Problem-Solving | Section 2. Developing Facilitation Skills | Main Section | Community Tool Box (ku.edu)

Facilitation Audit Form-Link

Employee evaluations, that begins with a self-evaluation, which includes wins and goals

Buffalo & Erie County Workforce Development Consortium, Inc.

May 22, 2024

Employee Performance & Development Self-Evaluation

Start now

Buffalo & Erie County Workforce Development Consortium, Inc.

Jun 4, 2024

Employee Performance & Development Self-Evaluation
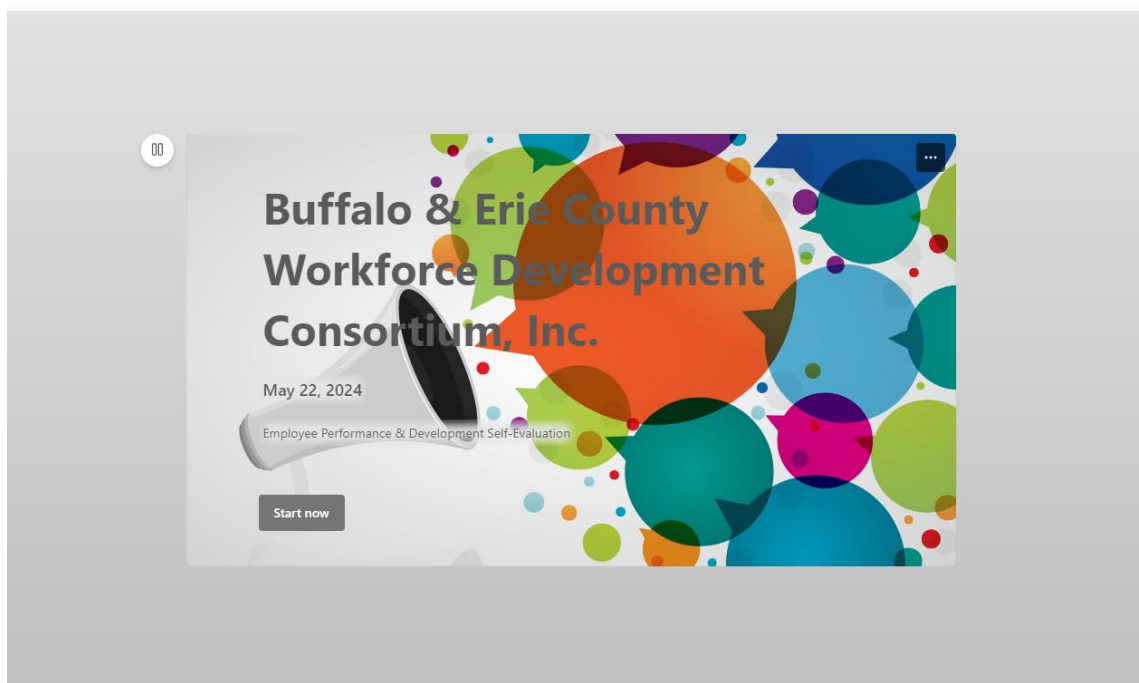
* Required

1. Employee Name *

2. Quality: The extent to which an employee's work is accurate, thorough, and in an acceptable format. Professionally committed to customers and workforce partners; creates a pleasant atmosphere for interaction and takes appropriate action to meet their needs. *

1-Results are generally unacceptable and require immediate improvement.
2-Performance is deficient in certain areas; improvement is necessary.
3. Competent and satisfactory levels of performance.
4. Performance exceeds job requirements.
5-Performance is exceptional and consistently exceeds requirements in all areas.

1	2	3	4	5

3. Why *

4. Productivity; Completes assigned work efficiently and in an organized manner within an established timeframe, works to complete objectives, and sees a task through to the end while taking into consideration current responsibilities and workload. *

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2-Performance is deficient in certain areas; improvement is necessary.
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4. Performance exceeds job requirements.
5-Performance is exceptional and consistently exceeds requirements in all areas.

1	2	3	4	5

5. Why *

6. Communication: Express ideas and information in writing and verbally, in a manner that is complete, clear/ concise, organized, and appropriate to the audience. Conveys information to supervisors, peers, and customers in a timely, clear/concise manner. Listens to others, and is open-minded to and evaluates suggestions from others. *

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4. Performance exceeds job requirements.
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1	2	3	4	5

7. Why *

8. Independence and Decision Making: Realistically weighs and evaluates information, separates important from unimportant, assesses probable consequences, and takes appropriate action. Demonstrates the ability to make decisions, timely and accountable for results. Create alternative decisions in compliance with program policies and demonstrates availability to work without close supervision. *

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1	2	3	4	5

9. Why *

10. Job Knowledge: Demonstrates comprehension of techniques, skills, processes, procedures, and materials necessary to perform the job. *

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2-Performance is deficient in certain areas; improvement is necessary.
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1	2	3	4	5

11. Why *

Back to page 1

12. Attendance: Demonstration of professional time management, be punctual, and observes prescribed work breaks and meal periods. Has an acceptable overall attendance record. *

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1	2	3	4	5

13. Why *

14. Creativity: Demonstrates initiative to research new and better ways to improve programming and center services; proposes new ideas. *

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4. Performance exceeds job requirements.
5-Performance is exceptional and consistently exceeds requirements in all areas.

1	2	3	4	5

15. Why *

16. Adherence to Policy: Adherence to professional policies and procedures as set by the agency and additional regulatory bodies, that are subject to change. *

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3. Competent and satisfactory levels of performance.
4. Performance exceeds job requirements.
5-Performance is exceptional and consistently exceeds requirements in all areas.

1	2	3	4	5

17. Why *

18. Interpersonal Relationships: The employee is willing and demonstrates the ability to cooperate, engage, and communicated with coworkers supervisors, and workforce partners. *

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3. Competent and satisfactory levels of performance.
4. Performance exceeds job requirements.
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1	2	3	4	5

Back to page 1

19. Why *

20. Please describe accomplishments or new abilities since the last evaluation: *

21. Please describe areas that need improvement (Minimum 2): *

22. Please create 2 professional development goals: *

    * Smart Goal format required

Back to page 1

Table of Contents

Organization Information

Organization Chart

Strategic Plan

BETC Strategic Plan

Site Organization Chart

Staff Profiles

Section: Welcome

1. Greet Customers at the door and inquire about what brought them to the center

https://youtu.be/dnpMqQnt8WY?si=eiy8A4uRu10N-lS2
https://youtu.be/KAxiTg0Emsg?si=SwgARAEimnlNChKA

2. Language Access Line

Link
Google Translate
Link

3. Assist with checking in at the Kiosk, and properly indicate reason for visit

Check in print version.docx

    <u>Service Selection</u>

        Orientation- Provide Intake Packet

           Definition: New customer enroll in the center to receive services, counselor assisted or self- directed.

        Counselor Appointment (Scheduled)- Notify staff

           Definition: Existing customer meeting with a counselor as scheduled

        Counselor Visit (Unscheduled)- Notify staff

           Definition: Existing customer meeting with a counselor that has not been planned or scheduled.

        Workshop- Direct accordingly

           Definition: Job Club or any additional center workshop

        Job Search Activity (Self-directed)- Direct accordingly and monitor usage

           Definition: Using the resource center computer

        Interview Clothes- Notify Staff

           Definition: First Impression Clothes Closet visit

        Fax/Copy/Print- Direct accordingly and monitor usage

           Definition: Existing center member using equipment for workforce/training services

        Youth Workforce Service- Direct accordingly and/or notify staff

Definition: VR Career Exploration, or any additional workshop facilitated under the auspices of Aim Higher Youth Workforce Program

Job Corps- Direct accordingly and/or notify staff

Definition: Individual visiting the center to be serviced by Job Corps

BPS- Direct accordingly and/or notify staff

Definition: Existing center member participating in a BPS facilitated service (GED, ESL, Computer   class, Voc Ed)

Other- Direct accordingly and/or notify staff

Definition: Any other visit should have a line capturing the reason. Examples: Meeting with   BLANK, Open Interview with BLANK

4. Customer Satisfaction Survey- Link
    a. Should be shared in orientation and to be as needed by customers
        i. Counselors will be provided with a "Your Opinion Matters" poster for their offices. Important to note that feedback, no matter the type, will be used for improvement. Any complaint will be subject to grievance policies/procedures.

Section: Disruptive Customer Procedure

Link to DOL Guidance

Link to BETC Customer Rules Agreement

Please refer to the NYSDOL Police Linked above. Below captures a short summary of steps to complete when responding to disruptive behaviors.

Rule Violation

1. Give verbal warning to customer.
2. If behavior continues, or if this is not the customer's first violation, verbally suspend the customer (see Verbally Suspending a Customer).
3. If a verbal suspension is given, contact the DEWS Director by telephone with a follow-up email including incident description and actions taken.
4. Immediately document in OSOS whether the result is a verbal warning or a verbal suspension.
5. If a verbal suspension is given, submit an UIR within twenty-four (24) hours (see Documenting the Incident).

Disruptive

1. Give verbal warning to customer.
2. If customer persists, notify supervisor and security.
3. If disruption persists, immediately verbally suspend the customer (see Verbally Suspending a Customer) and issue a Notice of Violation in writing.
4. If a verbal suspension is given, contact the DEWS Director by telephone with a follow-up email including incident description and actions taken.
5. Immediately Document in OSOS. Submit an UIR within 24 hours (see Documenting the Incident).

Violent/Threatening

1. Notify Security
2. Verbally suspend the customer and issue a Notice of Violation in writing;
3. Notify the Division of Employment and Workforce Solutions (DEWS) Director by telephone, and follow up with an email, as soon as possible;
4. Document the incident in the One-Stop Operating System (OSOS);
5. Submit an Unusual Incident Report (UIR); and Provide updates to the DEWS Director when new information becomes available and advise when back to normal operations.
6. **Any customer behavior that is violent or threatening, immediately call 911. Once 911 has been called, proceed with the steps outlined above.**

Recording in OSOS

1. Select the Pgms/PA tab in Customer Detail. Click the Non-Service Event button. This will open the Customer Non-Service Event webpage dialog.
2. 2. Click the Add button at the bottom of the Non-Service Event webpage dialog. Select Service Suspension from the Non-Service Type drop-down menu at the top of the webpage dialog box. Enter the start date of the suspension in the Start Date field. Click the Save button. This will update the customer's OSOS record with a Service Suspension – Initiated activity. It will also cause the word Disruptive to display beside the customer's name in OSOS search results and in the customer's OSOS record. This provides an easy way to immediately identify that the customer was suspended from service.
3. 3. Using the Comments button at the bottom of the Customer Detail window, record the general reason for the verbal suspension. Also include any specific critical information describing the circumstances and/or terms of the suspension that should be known by other office staff

Section: Orientation

1. CRC Staff: Direct the customer to sign-in for orientation using the paper attendance sheet Provide customers with an intake packet and pen to complete, and advise them that a staff member would call the group to go to the orientation room

2. Facilitator: 12:05p, announce orientation and direct the class to the reserved room. Facilitate orientation and ask/answer any questions with the orientation forms. Provide attendance sheet to Executive Administrator. After concluding orientation, alert the Data Entry Team, for new member assessment.

3. Executive Administrator: Record enrollment in spreadsheet, with customer OSOS number if applicable, and catalog staff assignment

4. Data Entry Specialist: Review orientation documentation for completion and accuracy. Retrieve or direct customer to bring any verifying or additional documentation to their first appointment. Once this has been completed, verify eligibility and enroll in OSOS accordingly (Adult, DW, Youth, Self-directed).
   a. Data Validation
   b. Enrolling Activity Validation

Orientation Workshop (In-person and Virtual Attendance Options)

Prior to orientation, you should prepare the learning space for your guests, and ensure your presentation is ready. *Always be prepared for technology failures Orientation PP <mark>(To be updated Create link and add slide about selective service, check-in systems, BETC ID and satisfaction survey, and staff photos/titles)</mark>

1. Introduce yourself and confirm attendance
2. Verify that your facilitation is adapted to the audience
3. Review the new member packet
4. Packet Q & A
5. Facilitate content
6. Center Tour/Staff Introductions
7. Transfer attendance sheet to Office Manager for record keeping and customers to Data Entry Professionals for new member assessment
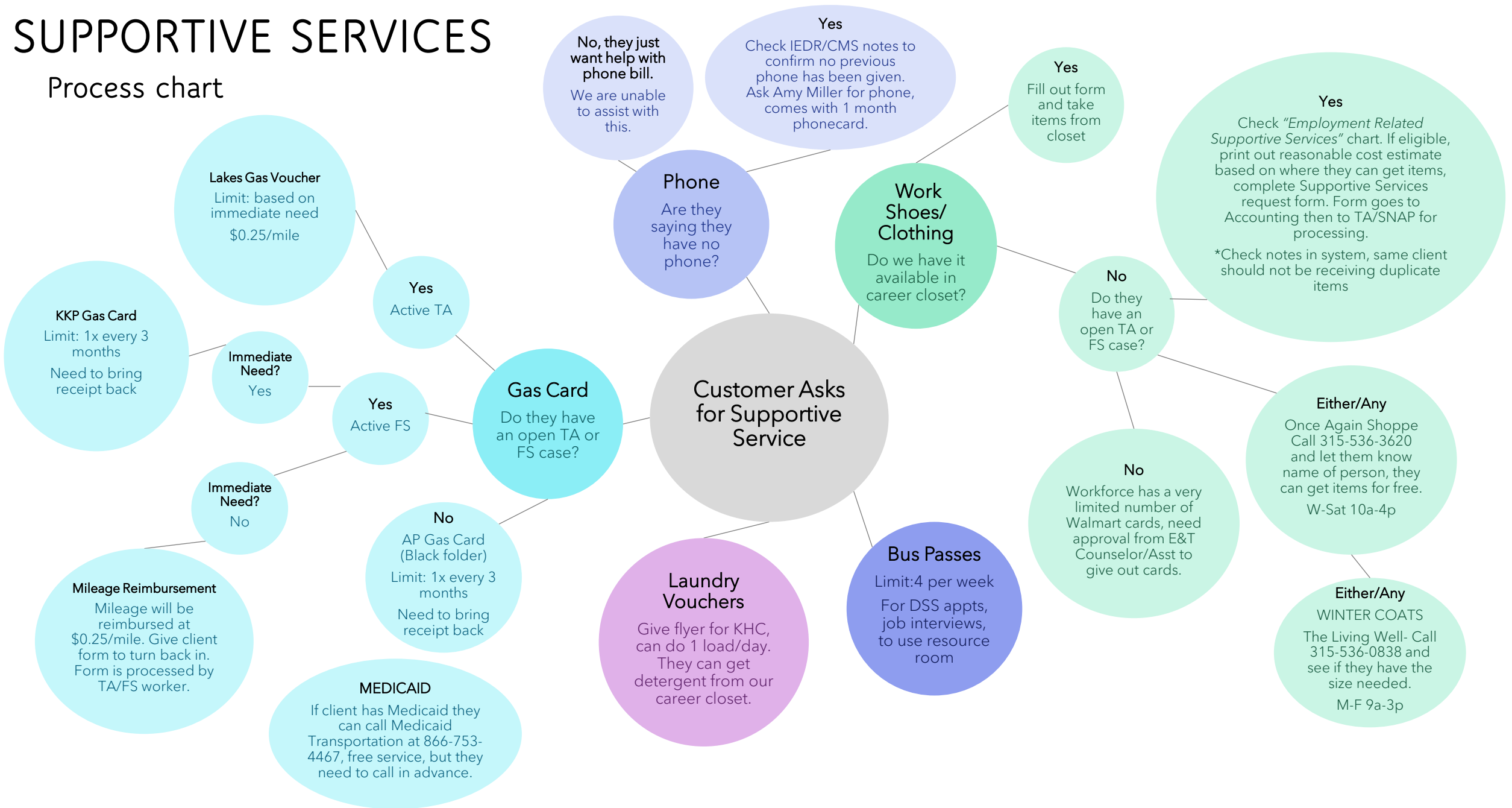
Good Speaker Skills-Ted Talk

Chapter 16. Group Facilitation and Problem-Solving | Section 2. Developing Facilitation Skills | Main Section | Community Tool Box (ku.edu)

Facilitation Audit Form-Link

SUPPORTIVE SERVICES
Process chart

Phone
Are they saying they have no phone?

No, they just want help with phone bill.
We are unable to assist with this.

Yes
Check IEDR/CMS notes to confirm no previous phone has been given. Ask Amy Miller for phone, comes with 1 month phonecard.

Work Shoes/ Clothing
Do we have it available in career closet?

Yes
Fill out form and take items from closet

No
Do they have an open TA or FS case?

Yes
Check "Employment Related Supportive Services" chart. If eligible, print out reasonable cost estimate based on where they can get items, complete Supportive Services request form. Form goes to Accounting then to TA/SNAP for processing.

*Check notes in system, same client should not be receiving duplicate items

No
Workforce has a very limited number of Walmart cards, need approval from E&T Counselor/Asst to give out cards.

Either/Any
Once Again Shoppe Call 315-536-3620 and let them know name of person, they can get items for free.
W-Sat 10a-4p

Either/Any
WINTER COATS
The Living Well- Call 315-536-0838 and see if they have the size needed.
M-F 9a-3p

Customer Asks for Supportive Service

Gas Card
Do they have an open TA or FS case?

Lakes Gas Voucher
Limit: based on immediate need
$0.25/mile

Yes
Active TA

KKP Gas Card
Limit: 1x every 3 months
Need to bring receipt back

Immediate Need?
Yes

Yes
Active FS

Immediate Need?
No

Mileage Reimbursement
Mileage will be reimbursed at $0.25/mile. Give client form to turn back in. Form is processed by TA/FS worker.

No
AP Gas Card (Black folder)
Limit: 1x every 3 months
Need to bring receipt back

MEDICAID
If client has Medicaid they can call Medicaid Transportation at 866-753-4467, free service, but they need to call in advance.

Laundry Vouchers
Give flyer for KHC, can do 1 load/day. They can get detergent from our career closet.

Bus Passes
Limit:4 per week
For DSS appts, job interviews, to use resource room

Supportive Services Process

Gas Cards

•Check and see if client has an open TA or FS case (not "pending" status).

•If they do not, they can have an AP Gas card 1x every 3 months, and they need to bring the receipt back to Workforce. These cards are in the black folder.

•If they have an active TA case, they should be given a Lakes Gas Voucher. Limit: Based on immediate need. Voucher amount should be calculated at the rate of $0.25/mile.

•If they have an active FS case, and the need is immediate, they can have a KKP Gas Card 1x every 3 months, and they need to bring the receipt back to Workforce. These cards are in the KKP folder. If the need is not immediate, they should be provided with the Mileage Reimbursement form. Mileage will be reimbursed at $0.25/mile. Give the client the form to turn back in, and the form will be processed by the TA/FS worker.

Medicaid Transportation

•If client has Medicaid, they can call Medicaid Transportation at 866-753-4467. This is a free service, and they need to contact ahead of time to get transportation.

Bus Passes

•Available for DSS/WFD appointments, job interviews, and to use the resource room. They are not given out for medical appointments unless the appointment is to get exemption paperwork completed for TA/WFD. Limit: 4 passes per week.

Laundry Vouchers

•Give flyer for KHC. They can do 1 load of laundry per day. They can get detergent pods from our career closet (need to fill out career closet form). We no longer give out laundry vouchers to other places.

Work Shoes/Clothing

•Check and see if we have the requested items available in the Career Closet. If we do, fill out the form and take the items from the closet. Form goes to WFD front desk.

•If we do not have the items in the closet, check to see if they can get items from The Once Again Shoppe. They would like us to call and give them the name of the person we are sending. Their number is 315-536-3620, and their hours are Wed-Sat 10am-4pm.

•If the person is looking for a winter coat, call The Living Well and see if they have any in an appropriate size. Their number is 315-536-0838 and their hours are M-F 9am-3pm.

•If none of these options are viable, find out if they have an open (not "pending" status) TA or FS case. If they do not, workforce has a very limited number of Walmart cards, but you will need to get approval from E&T Counselor/Assistant to give out a card.

•If they do have an open TA or FS case, check the "Employment Related Supportive Services" chart. If eligible, print out a reasonable cost estimate based on where they can get the items, and complete the Supportive Services request form. The form then goes to Accounting, then to TA/SNAP for processing. *Check notes in the system, the same client should not be receiving duplicate items.

Phones

•Check IEDR and WTWCMS notes to make sure that the person has not been previously provided with a phone. If they have not had a phone previously, ask Amy Miller for a phone. They are TrackFones and come with a 1 month service card. After this, the person needs to pay for phonecards on their own.

•If the person has a phone and is asking us to pay for their phone bill, this is not possible through Supportive Services.