A Summary of the Training Modules

Region I:  
Case Counselor Training

Four Indicators of   
Effective Service Delivery



## Introduction:

Region 1 Case Counselor Training: Four Indicators of Effective Service Delivery was designed for front line Case Counselors and their supervisors and managers. The four-module training covers essential indicators of effective service delivery:

* Keeping Precise and Effective Case Notes
* Understanding Basic, Individualized and Follow-Up Career Services
* Improving Time Management
* Knowing What Employers Want

Each training module includes a PowerPoint presentation, a teaching aid, and a quiz that can be used to measure the case counselor’s proficiency level. An AJC can choose to issue a certificate of completion to staff members who successfully pass the quizzes. A sample certificate is also included. The certificate can be tailored by the AJC to reflect completion of each module or the whole suite of modules.

The training is not meant as official guidance and is more of a collection of promising practices, shared ideas and recommendations.

Individual AJCs can tailor the slides and the associated, embedded notes to their particular needs. PowerPoint presentations have an option to also embed audio to follow along with the slides. It is recommended that AJCs record the notes of each slide to create a customized audio presentation.

We also recommend that AJCs use the voices of their own staff members to record the notes. This way, trainees will hear a familiar voice and while the narrators are “learning their lines,” they are also learning the content.

Since the quiz questions and answers are now published in the public domain, it may be advisable to mix them up a bit by changing the text of the quiz questions and their order.

The training was funded by the U.S. Department of Labor Employment and Training Administration Region I using the Technical Assistance and Training (TAT) process. A subject matter expert was hired through a contract with Jobs for the Future and Maher and Maher to develop the content.

A national Webinar attended by over 750 participants was convened on Friday, May 26, 2017 to introduce the four training modules.

ETA’s Region I commissioned this training because of a need they discovered through monitoring visits. It was believed that the AJC staff could benefit from training that included promising practices in case notes documentation and in telling a customer’s story. There was also an interest in training about career services and other important topics.

## I. Writing Effective Case Notes

In the first training module, “Case Notes”, Case Counselors on the front lines of an American Job Center learn how to capture and record valuable notes from conversations with their customers. The training is also intended to help them tell a customer’s story in such a way that colleagues and supervisors can serve a customer in the event of a Case Counselor’s absence.

Sections of this training module include:

* The Importance of Capturing Case Notes
* Why Do We Document Activities?
* Who is Going to Read These Notes?
* Characteristics of Good Note Taking
* When Should We Capture Case Notes?
* Telling Your Customer’s Story
* Six Element to Include in Case Notes
* Significant Events to Report
* Closing the Case

## II. Understanding Basic, Individualized, and Follow-Up Career Services

In the second training module, “Understanding Basic, Individualized, and Follow-Up Career Services”, Case Counselors can learn how to distinguish among these Career Services. More important is the distinction between Self-Service customers, also called “Reportable Individuals” and Staff-Assisted customers, also called “Participants”. There is information about the functional alignment of One Stop operations, the “No Wrong Door” practice and Priority of Service.

Sections of this training module include:

* The Primary Goals of Career Services
* How Does WIOA Differ? (from WIA)
* Service Integration
* Assessments
* Referral Services
* Labor Exchange
* Labor Market Information
* Web-Based Career Exploration
* Priority of Service
* The Individual Employment Plan
* Career Planning
* Essential Skills Training
* Contextualized Learning
* Follow-Up Career Services

## III. Improving Time Management

In the third training module, “Improving Time Management”, Case Counselors can learn promising techniques and tips on how to manage their valuable time. They are encouraged to share the responsibility of time management with their customers and their colleagues.

Sections of this training module include:

* Primary Goals of Time Management
* Finding Time
* Scheduling Time to Address Customer Needs
* Creating Agendas for Meetings and Calls
* Creating Templates for Agendas & “To Do” Lists
* Using the IEP as a Guide

## IV. Knowing What Employers Want

The fourth and last training module, “Knowing What Employers Want,” could also be called “What Every Case Counselor Should Know About Business Services”. With a better understanding of what employers are demanding, Case Counselors can support their Business Services colleagues and their job seeking customers with more information and context.

Sections of this training module include:

* What Do Employers Want?
* Why is this So Challenging?
* How Do We Address Employers’ Needs?
* Retention Services
* Labor Market Information for Employers
* How Can We Support One Another?
* Evaluating Your Collaboration

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