**WorkforceGPS**

**Transcript of Webinar**

**Region 1 Case Counselor Training**

**Four Indicators of Effective Service Delivery**

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LAURA CASERTANO: Hi welcome everyone to today's webinar. My name is Laura Casertano and I will be here if you need anything technically speaking. Hopefully you won't need to hear too much from me but if you do have any technical questions or concerns just go ahead and let me know in that chat window on the bottom left hand corner of your screen. That chat window is also where we'd like you to introduce yourself now.

I do see that many of you have done so already, but if you haven't just go ahead and let us know your name, name of your organization, where you're located in the country and how many are joining you if you're joining in a group. That chat window is also where we'd like you to ask any questions or make any comments throughout today's webinar. We'd love to hear from you and we'll get to as many of them as we can.

You'll also notice in that file share window that we have a copy of the PowerPoint as well as some other documents so you can download them at any time throughout today's presentation. Also a copy of the PowerPoint as well as a copy of the recording of today's webinar and a transcript of today's webinar will be made available on WorkforceGPS in about two business days.

So now I'm going to move us right into today's presentation. Again I want to welcome every one to today's webinar. And if you haven't done so already just go ahead and make sure you introduce yourself in that chat on the bottom left hand corner of your screen.

And now I'm going to turn things over to your moderator today, Kate Banimenia, workforce development specialist with the U.S. Department of Labor. Kate?

KATE BANIMENIA: Thank you very much and thanks for joining us. So I am the Regional Performance Specialist from Region 1 Boston, and I am going to give you a brief background of what this webinar is all about before I introduce you to the two other speakers.

So the regional office for the Employment and Training Administration receives funding to support technical assistance to our states, and in our region we identified a need for some support around case management for case managers at American Job Centers in our region. Mostly this came about through monitoring visits and case file reviews where we noticed in certain areas that there were needs to improve how case counselors are really documenting and telling their customers' story.

So we looked to utilize jobs through the future with our technical assistance funds this year to develop some training content around case management services to provide to our regional office American Job Center staff. So the hope that we had when we developed this was that we would come out with a product that would enable American Job Centers that were interested to utilize training for new as well as current case counselors to really give them an effective understanding of what case management looks like.

And the goal that we had at the end of this was to develop something that if a job center wanted to use it it would have sort of a credential, a certificate, that would result at the end of completing the training so the case counselors could give that to their managers as proof as sort of going through this training module and having a good understanding of what effective case management is.

So with that we contracted with Jobs for the Future and specifically we've been working with Benjamin Kushner to develop this product. And I should also add that although the U.S. Department of Labor utilized our training funds to pay for it we do not specifically endorse the product as we can't do so but we are still encouraging American Job Center staff that are interested in utilizing it if you feel it's an effecting tool for you to do so.

So then also worked with a number of folks who work in American Job Centers in Region 1, including John Sousa, to have their input on this product. So I'm going to let John talk for a minute about his job center and give you a bit of a background on his local area.

JOHN SOUSA: Good afternoon. This is John Sousa. I'm a program manager in the city of Fall River. We have some three career centers that we deal with, Fall River being the primary one. We also have the Attleboro Career Center and the Taunton Career Center. Let me just tell you about Fall River. We are very close to Boston; we are about 52 miles from Boston, about 17 miles from Providence and about 12 miles from New Bedford. New Bedford's closest to the Cape.

Our primary population is about, I would say, about 500 (thousand) to 600,000 people. But the city of Fall River primarily what I would say textile manufacturing. That's pretty much what I can say about our city.

BENJAMIN KUSHNER: Great, thanks John. And this is Ben Kushner. I'm going to move it onto slide 6, Kate.

MS. BANIMENIA: OK. So John or Ben, can you tell us about the certificate of completion that I just spoke about and other materials that make up the training?

MR. KUSHNER: Right. So all of the materials are going to be available on WorkforceGPS in a few days, and they'll be loaded as four PowerPoints, four teaching aids, four quizzes – one for each of the four trainings. And there's going to be a sample certificate that we're recommending that job centers use.

So it would be up to the AJC how to issue the certificate. Perhaps they will want the individual case counselor to go through all of the training and when they have a certain level of passing the tests they'll issue a certificate of completion for all four. Or maybe the AJC will decide to issue the certificate of completion to their front-line staff after completing each one of the trainings.

But there are basically four trainings. One training is about keeping precise and effective case notes. The second one is understanding the difference among the various career services. A third one is improving time management for case counselors. And a fourth one is knowing what employers want. And the fourth one is more from a case counselor perspective to get an idea what employers want so they can work more effectively with their business services team. So that's how we're thinking that we could issue these certificates.

Each one of the modules could be adapted by the individual AJC – and that's what we're recommending. And one of the things we were thinking about was the fact that each one of these PowerPoints can have audio embedded into them. So each one of the PowerPoints comes with an extensive script that describes the slide that you're looking at; and then we're recommending that you actually record your own voice into this PowerPoint.

So perhaps this could be a team effort and staff of the AJC can divide up the slides and each one of the staff members could record a few of the slides. There are two reasons why we think this is a good idea. While the staff member is learning their lines to record onto the PowerPoint, they're also learning the content which is very good.

And then the other plus to this is that when someone's doing the training they're hearing a familiar voice. They might be hearing the person that works next to them or someone who works in a different department in their organization. So we think you should use the scripts that are embedded in the notes of the PowerPoints and do your own recordings.

OK. So I'm up to slide 7, Kate, and what I wanted to do is to go over perhaps the first of the trainings. I'm going to take some slides out of each one of the trainings. And first we're going to talk about case notes and then describe a little bit about that training. And again, this is the training that will be available in a few days in WorkforceGPS. You can just return to the same place where you found this webinar today.

MS. BANIMENIA: OK. Great. So can you go over a little bit Ben about how you went about researching this module?

MR. KUSHNER: Right. So first thing I did was to look at all of the resources that were available on WorkforceGPS. There are a lot of resources available on all of these subjects. In this particular one, case notes, I found a few things but also I talked to some practitioners. We had a focus group in San Diego during the national convening in San Diego. And I also talked to the folks that John works with in Fall River and developed some of the – based on some of the needs that they mentioned – developed the training from that.

So part of the training – one of the things we say in developing good case notes is we recommend that you put yourself into the readers place. So by doing that you want to make sure that the notes that you're leaving can be read by someone else. Whether it's your supervisor, or someone that's filling for you, will they be able to understand the notes that you've put together? Are they understandable? Is the customers' status very clear from your notes? Is it very clear what the next steps are? Or what the assignments were for the customer? And making sure that all of your objectives are documented.

So putting yourself in the readers place is one of the key points of the case notes training. And again I'm just pulling out a couple of the slides from that training. But each of these trainings is pretty extensive.

We're recommending that you make sure that you're notes are clear, understandable and are using common language. So we urge you not to use too many acronyms. But keep in mind we don't expect you to write out "Workforce Innovation and Opportunity Act" each time you're referring to WIOA. There are some common acronyms that it's OK to put on. We recommend that you talk to your colleagues and your leadership about which acronyms are acceptable. We think that acronyms are acceptable. We think that acronyms like TANF or TABE or OJT, or IEP or AJC – those are all acronyms that are so common that it's OK that you don't have to write all that out.

So let me ask John just a quick question here. John, do you allow acronyms or do you ask your staff to resist too many acronyms? Do you have a list of acceptable acronyms?

JOHN SOUSA: Well, we tell them not to use too many acronyms. As long as it's acronyms that we can identify with. Like we just mentioned a few – DTA, AJC or WIOA – those we can identify. But other acronyms that we don't know about we try to avoid them as much as we can.

MR. KUSHNER: Great. That makes sense. That makes sense. OK. So now also part of the case notes training we're talking about opinions. So when do you use your personal opinion, when do you use your professional opinion? And in this case we think that you're always using your professional opinion and that's important to use.

But we want to make sure that you're case notes are really relevant to the customer's experience. And it's OK for you to think intuitively. But when you're writing up your case notes the notes should be based on facts and evidence and not on your intuition, or your feelings, or your beliefs.

So here are some examples of what we think you should avoid. You should avoid personal beliefs about something that's not relevant to serving the customer. We think that you should avoid subjects that don't relate to the goals of employment and training. There shouldn't be an overreliance of the case counselor's opinion or the customer – the opinion of the customer's motivations, because you don't necessarily know what their motivations are. And you should avoid off-topic personal information shared by the customer including medical conditions unless it related directly to their ability to look for work.

So another issue that comes up in the case counselor training is when should you be capturing case notes. And I found this very interesting. In my conversations with many practitioners I got a few different answers. Some of them feel that case notes while they're interviewing their customer they should be typing directly into their MIS system.

And that's one school of thought. Another school of thought says, well, you should maintain eye contact as much as possible and not be typing away. So one thing you could do is take hand written notes and then transfer the handwriting notes in to the system later on. Some AJCs ask that this be done within 24 hours. Others allow a longer period of time.

So this brings us to our first polling question. I was interested in learning what the experience in your center is. So what is the practice at your center? Do you allow typing in front of the customer while you're interviewing them? Do you allow handwriting while you're interviewing the customer and then transcribing into the MIS system? And then if it's a longer time frame than 24 hours specify that. We also have an option if you don't want to answer or if it's not applicable or just you have no vote at all.

So for the most part we see that people are handwriting and then transcribing later. And it seems to be within a 24-hour period. That's great. OK we can go onto the next slide.

Telling your customer's story. So in writing up case notes it's important to tell your customer's story. And in that case, of course, there's a who, what, where, when, why and how of telling you're customer's story. So it would take a very long time to go into that today because we have other trainings we want to talk about. But keep in mind that in the case notes training we go into every one of those aspects. The who, what, where, when, why and how of your customer's story to help guide you through the case notes competition.

We found that there were about six elements to case notes. And these are basically the six elements. We break this down in the training and we give you examples of each one of those. And we're advising you also to keep in mind that when you're meeting with a customer you might expect certain things – you might have had a certain agenda for that particular topic, for that particular day – and then suddenly something else has come up.

You should be aware and you should be ready for the fact that there might be the unexpected. And the unexpected could be something like, "I'd rather not talk about this. I need help with my interviewing skill." Or, another thing that's unexpected is it's possible that someone might be sharing with you something that's very serious in their life, like there could be a criminal activity having to deal with spousal abuse or there could be a very deep feeling of depression that's leading to feelings of suicide.

And we're recommending that each of the AJCs have some kind of protocol if a customer were to raise some serious issues like that. So we're hoping that AJCs do have that in place and that case counselors know what that is. So expect the unexpected and be aware that a protocol could be in place in case something serious comes up in the conversation.

Each one of the trainings comes with a quiz. So roughly the quizzes are about 12 questions each. And the AJC could decide what is a passing grade. We're recommending that 10 correct answers is a passing grade. And this is the kind of – we took an excerpt from the case notes quiz. This is an example of what the quiz looks like. So let me ask, John, do you think that something like this – quizzing your staff and awarding them with a certificate of completion – is that something that your AJC would find useful?

MR. SOUSA: Absolutely.

MR. KUSHNER: And we're recommending that also that this is something – when you're compiling this information when you have – let's say you have 100 percent of your staff has passed these quizzes and have been given certificates of completion we recommend that you mention that in your reports, you mention that to your local area WIB or to your state WIB that your staff is fully trained and has been certified in certain – these topic areas. We think this is a good thing for you to brag about –

MR. SOUSA: Yeah. Absolutely. I do believe – I mean, first the staff needs to be trained on – understand exactly what they are issuing to our customers coming to our career centers. So they first – first must be knowledgeable in order to teach it or to use it with our customers.

MR. KUSHNER: Right. OK. And each one of the trainings also comes with some sort of teaching aid. And in this case, for the case notes training, we included a couple of exercises that a group could do at your center and also we've given many examples of what case notes look like.

So one of the things we're recommending is that you have a staff meeting with some of these teaching aids and then ask your staff, "What do you think about the way this case note is written up? What is missing from it? Can you tell what the customer's status is from looking at this? What do you think their next steps might be?" So you could use this as an exercise in training your staff as a group.

So again, each one of the trainings comes with a teaching aid.

Now I want to move onto the next module which is understanding basic, individualized and follow-up career services.

One of the things that I learned in doing research on this – I was wondering well, why do we make the distinction? And why is there a distinction between these three types of career services? And how would that relate to the case counselor in particular? As it turns out, the distinction for the case counselor for these three types of career services is less important than some other distinctions which we'll go into.

So it is not that important for you to know what the customer is experiencing, where the customer is in their basic, individualized or follow-up services. What's more important is to understand what kind of customer we're talking about. And the two basic customer – one is a self-service customer that we also call a reportable individual. That's someone who's not enrolled in the program. And we have an explanation of that a little later on. And then we have the staff-assisted customer who is enrolled and they're tracked as participants.

So before we get into that – some specificity around that – I thought we'd do another lightning round of questions. In your center, can self-service customers receive individualized career services? So there are three choices here: yes, they could receive both basic and individualized services; no, customers receiving individualized career services must be enrolled and receive staff assisted services; or three, not applicable, or four, some other answer. And if you have some other answer please put it into the chat feature.

OK. We're talking specifically about self-service customers. I'm a little surprised that we have answers of self-service customers receiving individualized services. Because my understanding – and Kate, correct me if I'm wrong – we were expecting more the second answer which is self-service or reportable individuals are not participants and therefore don't get individualized services. Kate, would you agree that that's the case?

MS. BANIMENIA: Yes I would. So for those who on the webinar who are case counselors or staff that work with Titles I, II, III or IV, I would refer you to training and employment guidance letter 10-16 – TEGL 10-16 – which defines what a reportable individual is and it does specify there that those individuals that are receiving only self-services are considered reportable individuals and they should not be receiving individualized services as well.

MR. KUSHNER: And John, is that also your experience at the centers?

MR. SOUSA: Let me just say my answer would be number two, no, customers receiving individualized career services must be enrolled and receive staff-assisted services.

MR. KUSHNER: OK. OK. And I see some of the people changed their votes here. Probably there was – they needed clarity on that and they changed their votes.

Let's move onto the next lightning round question. Question two. In your center, if a customer needs their aptitude or interest assessment interpreted by somebody, are they considered a staff-assisted customer? One answer is yes, or no, or it depends on the extent of the interpretation, or not applicable or some other answer. Some other answer please put that in the chat feature. Again, if your customer needs their aptitude or interest assessment test interpreted by someone.

So here a lot of people are saying that – are saying yes, which is what I expected. That that's considered staff-assisted. But many also are saying it depends on the extent of the interpretation. So one of the things we learned about staff-assisted versus self-service – it's the level of high-touch or low-touch between a staff member and the customer. We'll get into that in a minute.

I just want to do another quick – thank you, this is good – I just want to do another quick lightning round question. In your center do you offer any workshops for non-enrolled customers such as how to independently conduct career exploration or job search? So your choices are number one, all workshops except for orientation are exclusively for enrolled customers; number two, some workshops are mixed with enrolled, non-enrolled, self-service staff assisted customers; number three, not applicable; or number four, other answer.

OK. So we're seeing here that quite a few of them are mixed. Quite a few of them are mixed. Now, I know there are issues – Kate and I talked about this earlier – there are issues around report ability of those customers but in fact as a strategy you'll see from the training that we have on time management and some other trainings that we do recommend that workshops be open to more people. But apparently there are issues around reporting that you should pay attention to. And it's possible that you just need help from you – from your leadership on this or from a state FPO on this. Kate, do you want to weigh in on that issue?

MS. BANIMENIA: Sure. So according to our reporting guidance and I – the career counselors themselves probably aren't too familiar with this but the participant individual record layout is the reporting template that ETA utilizes for Titles I and III. And there is an element in there that specifies that workshops are a staff-assisted service. So according to our reporting guidance, reportable individuals should not be receiving staff-assisted services which would include workshops.

So the interpretation there would be that anyone who is in a workshop would need to be determined eligible for Wagner-Peyser under Title III or under a Title I program to receive that service.

MR. KUSHNER: OK thanks. I want to do one more very quick lightning round question. And this has to do with the size of the case load of a typical case counselor. In your center what is the typical size of a case counselor's case load. You choices are less than 50, 50-100, 101-200, more than 200, not applicable or no answer.

It's just saying that it's – the numbers are so close. OK. Another second on this. Great, thanks. Let's go to the next slide.

So, very quickly, a couple of the characteristics of a self-service customer. They're receiving minimal basic career services, minimal. Very little touch with a staff member. They're independent, self-assessment. They're doing their own independent self-assessment and interpretations. They are called reportable individuals. They are not enrolled. They're independent job-searchers. And they consider themselves qualified, job-ready with no skills gaps. So they don't need training, they don't need extra education. That's the characteristics that makes them self-service. And as we mentioned they're not considered a participant who needs to be tracked.

By contrast, we have the staff-assisted customer who receives basic individualized and in some cases they're receiving follow-up services. They may require training or education to move along their career pathway. They may have a barrier or skills gap that needs attention. And they're enrolled and they're considered participants and they're tracked.

Those are basic differences between the two sets of customers and that's what would concern case counselors the most. So also in the career services module – the training module – we talk about integration and how do we achieve service integration. So this is the how-to of service integration.

And within case management we are recommending a few strategies. And one is the no-wrong-door policy, which when a customer comes in, they're served by many different staff members, not just specialists. We refer at the end of this webinar and also in our trainings we refer to a webinar that was conducted about service integration and there are some great examples about what it looked like before, what it looked like after.

It requires a lot of cross training of your staff. So this is a professional development issue. We recommend that they do staff – that they do job shadowing. So maybe a case counselor can follow a business services rep, get an idea what that's like. Maybe a case counselor can follow – someone coming from one title program should follow someone from another title program so they get a better understanding of all the different titles, all the eligibility requirements and all the referral services that are available.

A lot of cross training having to – be involved in this. Team meetings. Your team could be a functional team. Your team could be a program team. But have team meetings so that you really understand what everyone else is working on. And these are – that's part of the training on service integration.

Also part of service integration is a common identifier. So everyone in the center would have a common business card. The logo would look the same. Your program would not be mentioned. Your funding stream would not be mentioned. But your title is mentioned. And it all says something like what your title is and then that you're part of this particular AJC which is part of the state system, again, which is part of the national system.

So I wanted to ask John – in terms of identifying staff in your center, do they have something like this on their business cards?

MR. SOUSA: Yes they do. We have – as a matter of fact we have one that says – I mean, if you're a part from the four career centers says Commonwealth of Massachusetts Employee for a career center and it has your picture on it. So that, we wear around our necks. Anyone throughout the whole career center whether in Fall River, Taunton, Attleboro – have to have one. So it facilitates identifying you if you are throughout the whole – the whole center and you're dealing with customers.

MR. KUSHNER: Great. So also in the career services training we talk about the importance of referrals. And how important it is to know where to refer a customer to and to get an idea of what's happening in your community. So we're recommending that you convene a workforce solutions forum in your community. You invite community members from education and business, you share information, and from this you try to create a document, a booklet, a guide that case counselors can use when they're talking to their customers so that they have the referral information.

So one of the things this document or this guide can have is the referral information, the name of the organization, the website, eligibility requirements – is there someone on staff, one of your colleagues who has used the service before you could ask them their opinion. So you develop and you publish this resource or this map for the case counselors staff. And again I want to ask John is this something that you've done? Have you convened a workforce solutions forum?

MR. SOUSA: Yes we've had. We've had state – we've had an integration with state. Also with DTA – we have co-location with DTA where we have one of our staff members located at DTA, they have one located at our center. One day a week we actually have two of our members located at DTA – local DTA twice a week. And we've dealt with DTA for quite a long time, now for about a year we've been doing that. And it seems to be working quite well.

MR. KUSHNER: Great and –

MR. SOUSA: I have a community college that comes in once a week to our centers, which is the local community college – Bristol Community College. We have Mass Rehab, we also are trying to co-locate with Mass Rehab, Mass Commission of the Blind. So also we've got great involvement of our WIB. They've been very supportive of that. So I think we're on the right track.

MR. KUSHNER: And John, tell us what DTA stands for.

MR. SOUSA: The Department Transitional Assistance.

MR. KUSHNER: Great. Great. OK. Throughout the training – we do have a whole separate module on time management. But throughout the career services training there are also tips on how to save time. And one of the things that we're recommending is that you create career one-pagers. So have a look at your community.

This is an exercise by the way that would be very good for career services team to do with the business services team. Work together, create career one-pagers. So this could be based on the most in-demand sectors or industries in your area, the top occupations, links to the web pages where they could get information and a list of employers in your area.

Andas a teaching aid that goes along with this training we have a sample of what one of those might look like. So you'll get an idea of the kind of information that you could put in there.

So now I'm going to move into the module on improving time management. We make a couple of suggestions. Obviously time management requires a lot of good organizational skills. And we recommend that you think about what are the common tasks that a case counselor would have to do with any customer. And that you make a list. The teaching aid that comes along with this training is a list of lists.

So there's a lot of lists about what tasks come up in case management, what tasks might come up when you're taking notes for each visit that comes in and you'll see from the training that one of the recommendations is that you use the IEP – the Individual Employment Plan as one of your guides to figure out what's the next step in service delivery to this customer and we have other tips like that.

This brings us to another polling question. Enter in the chat feature the top three tasks in case management that a case counselor needs to perform with almost every customer encounter. And here you have to use the chat feature. And we'll compile that for you and if possible we'll show you some results.

Oh great. Contact information. That was one of the things you'll see in our training that almost as a knee-jerk reaction every time you see the customer you should be asking them do I have your correct contact information? Also what is the best way I should reach you? Do you prefer getting texts or do you prefer getting e-mail?

Do I have the correct telephone number for you? So that was a great thing to bring up. You should always be discussing that at every encounter with your customer. Make sure you have the updated contact info. Great answers. Results of TABE scores. The IETs, over and over again. Assessments, sure. Great. Thank you very much.

We can move onto the next slide. OK.

So again in terms of time management and being organized we're recommending that you – it requires a lot of structure and it requires you to schedule time. And we recommend that you don't read e-mails as they come in. This practice can become very distracting. So you have to discipline yourself not to read e-mails as they come in. Of course if an e-mail is coming in from your boss or if there's something marked urgent you make an exception.

By the way, you'll see throughout all of the trainings – all of the training modules – that we often say use common sense here. Or use your best customer service practice. So even though we're giving you what we think is an opinion of a good rule to use, we're also saying yes there will be exceptions – use common sense. We recommend that you listen to your voicemail periodically and that you answer your calls as needed.

Now, most centers – I'll ask John about his center – most centers have a 24-hour rule where they say I promise to return your call within 24 hours. But again we're asking you to use common sense because some call need to be answered more quickly.

John, what is the practice in your centers?

MR. SOUSA: In our centers I would – again I talked to the staff it has to be answered as soon as possible but we allow at least 24 hours to be responded to.

MR. KUSHNER: Great. That makes sense. That makes sense. Also we're recommending that you try to set a specific time for handling personal matters and that should probably be in the afternoon. That you – that you schedule your most important meetings in the morning. Or the more difficult customer sessions that you're anticipating – maybe they're more involved and they involve more time or statistics or something like that – schedule those in the morning. And do your paperwork in the afternoon.

We're also recommending that when there's difficult news to deliver it should probably be done as soon as possible – not putting it off because if you put those conversations off difficult news could become more worse news. So try to do those as soon as possible.

So here's a recommendation we have that I think caught Kate's eye. And that is sharing the responsibility with a customer. I think it's perfectly reasonable and professional to say to the customer, "in order for us to be efficient about the time that we use, what can we do to save time?"

So one of the things you could ask your customer, "how much of this do we need to do on a one-on-one in person basis? How much could be done by e-mail? How much could be done by telephone? How often do we need to speak to one another? Can we set agendas for each one of these calls and each one of these meetings?"

So I would share that responsibility with the customer. And again here I'm saying use professional and common sense. Not every customer would be able to share that responsibility with you. But after you get to know that customer you should have an idea of which ones could share the responsibility with you.

Kate, did you have anything that you wanted to add?

MS. BANIMENIA: No, thank you.

MR. KUSHNER: OK. Speaking of sharing responsibility for time management, we're recommending that you also talk to your colleagues about this. Time management is basically everyone's problem – but there are some colleagues that do it better than others. Perhaps someone has broken the code to optimize their time management and it makes sense every once-in-a-while at staff meetings to have a group exercise or something with other staff members to say, "Has anyone come up with a brilliant idea on how to save time?" Or, "Has anyone figured out some way to manage their time a little bit better?"

You'll see in the time management training that we also recommend a lot of colleagues getting together and thinking about what are some of the common issues that our customers are facing? And possibly creating workshops around those issues. This could also be saving time because rather than repeat the same advice or the same guidance to the customer over-and-over again to various customers, you put them in groups – just like we do for resume writing or interviewing skills or something like that.

John, can you see a strategy like this working where your case counselors get together, strategize, figure out new topics for workshops?

MR. SOUSA: I mean, we have regular meetings with case counselors and we also have regular meetings with our BSR at least once a week to go over some of the issues that they face with and to come up with some of the solutions. And it's worked with us.

I mean, we have group – we even have cross – cross like a BSR will come in to the job developer or to the case counseling and the case management. So all of it – we try to integrate as much as we can. We call each member from each counseling session. We bring one of them in to talk about their experiences.

MR. KUSHNER: I think that's really important John and we are recommending this in the training – that there's a lot of cross-training that occurs between the career services team and the business services team. Those two teams could really work together to support each other's work.

And for example, the career services team might be aware of certain labor market information that the business service team needs to know about. So for example, they might know from talking to their customers – they might know this is a very popular occupation, this is a skill that everyone's talking about right now; this is an employer who's hiring right now. So this type of exchange should occur.

And then going the other way, from the business services team or the BSRs – when the BSRs talk to your case counselors they ought to be saying things like, "Most of our employers are really focusing on essential skills as opposed to the technical skills." Or something like, "This employer is insisting that they have strong computer skills."

So, sharing the skills, identifying skills gaps, these are conversations that come out of and these are ideas that come out of cross training and having regular meetings among the various staff members.

MR. SOUSA: That is correct.

MR. KUSHNER: OK. So that brings us to the fourth training module, knowing what employers want.

So this is designed really for case counselors to understand more about the role of the business services team and the business service representative. So it really shows you some – it gives you some idea about the work they have to do, all of the challenges that they have. We think that if case counselors understood all of this they could figure out better ways to support their job seeking customers and also support their colleagues in business services. So we devote a lot of time to that in the training for knowing what employers know.

Here are some examples: some employers are strictly looking for the technical skills. So they'll tell their business services rep, "I'm more interested in these skills. This is what's important. Getting into the specifics on how to use the machinery or what our policies are I can teach them once they're hired but they have to have basic technical skills."

There are other employers, especially when it comes to entry-level positions, lots of employers say, "I'm just looking for the essential skills." And that is what we used to call employability skills or job-ready skills or soft skills. I need people who are ready to work, folks who will apply themselves. They come to work and they're enthusiastic. They have a recent work history. And I'm more interested in the fact that they've been working somewhere because I can handle the training. I can train them on what they need to know at this office."

So that's a case where a business services rep sees the difference between an employer who prefers essentially skills over technical skill or vice-versa.

But then you also have employers that want something else. Employers might have a level of – they need very good communication skills – they need someone who could read and write very well. They need certain levels of math or reading test scores. And they're looking for computer literacy.

So my recent experience talking to various regions of the country on finding that this computer literacy issues is becoming more of an essential skill. That even though we think of essential skills as teamwork and a positive attitude, something that looks like a hard skill like computer literacy is becoming an essential skill; that almost everyone needs to have computer literacy.

John, would you say that that's been your experience from what you hear at your centers?

MR. SOUSA: That is correct. We even have on-site computer lab that we offer to individuals that come in and say, "I don't know much about computer skills." We have introduction to computers, we offer Microsoft Word, Excel, Access and PowerPoint. It's a four-week – usually we offer in the morning or afternoon and it's computer lab instructor.

MR. KUSHNER: Great. So also in the what are employers looking for, we talk about the importance of a business services rep and their listening skills. They have to have really good listening skills to figure out what this employer is looking for in terms of the workers that come in.

What is the corporate culture that exists at this company? What is their hiring style? Who are the hiring managers? And when they have those conversations with employers there are also great opportunities for them to learn about retention services that may be available. So this is, again, information that needs to go back from a business service rep to the rest of the AJC staff. This type of retention service would be very good.

So what do we mean by retention services? These are the follow up services that might be involved in training newly hired workers on how to use business equipment, or how to behave in the workplace, or one very big complaint we hear from many employers is the use of the personal cell phone.

That people don't know when to turn their cell phone off, people don't know when to be using it; people are using it too much. And also in general, they're smart phones, so it's activities like that and behavior like that that could be a good retention service training that you could be doing for customers that have been recently placed.

Obviously one thing that's great for the business services team to be sharing with their employers is labor market information. So it goes both ways. The BSR could be learning something about the labor market in a particular sector or industry and they verify that with the employers that they meet. They check to see salary levels. They check to see whether they match up with what they're hearing from other customers or what they're hearing from other employers.

So sharing that labor market information is very important and also having business service reps share that with the case counselors important component of that training.

Brings us to a new polling question. At your centers do the case counselors and business services reps cross train and share information? John gave us an example that yes they do that on a regular basis. We're wondering if – where which part you stand. Do you say that yes you do that as standard operating procedure? Do you like more ideas on how to expand on it, or no?

MR. SOUSA: Yes. This is built into our standard operating procedures.

MR. KUSHNER: Great. OK so we're seeing pretty much there's a lot of yesses. And some would like more ideas on how to do this. And you'll see in the training that we do give some ideas on that. Great, thank you.

That really is the end of the presentation. For the purpose of this webinar I've added some URLs for you to look at. There are a couple of webinars that I think would be good for you to look at, even before you get a look at the four modules of training. One webinar I mentioned earlier – implementing comprehensive affiliate and co-location requirements. And I created a TinyURL to make it easier for you to find that on WorkforceGPS. That had a lot of really good information on integration and organizing your staff to be more functional.

And you'll see examples of – you'll see examples of someone who – of a center that goes from being more program oriented to be more functional oriented and how that design looked. So I think that's a great webinar to look at.

I also want to give you a tip for searching when you see one of these CFRs or you see one of these citations. You can actually put these numbers directly into a browser, like Google for example, and what probably will come up – you can use any search engine – but probably what will come up is Cornell University Law or Cornell Law School and it will talk about the citation, it will talk about the citation, it will talk about – it will quote from the regulation and from WIOA legislation. So it's a good idea when you – when you are unfamiliar with one of these citations put it into the search and take a look.

TEGL 10-16 is great for the work that we're talking about and I've given you a TinyURL to make that easier to find. Kate even mentioned it when she was referring to the role of the self-service customer. So 10-16 is a big TEGL for us.

The universal design – recently we had a webinar on the universal design. And again, that talked about ways in which you should think about re-designing your customer service and re-designing into functional teams. Some great ideas on that webinar.

Obviously for career exploration the favorites – certainly my favorites – the very popular – the CareerOneStop, the O\*NET and the MySkillsMyFuture. MySkillsMyFuture being transferable skills research. O\*NET being general LMI and career exploration. And CareerOneStop being a one-stop of almost everything.

So let's see we can get into – we can get into some of the questions. Kate do you have anything that you wanted to add?

MS. BANIMENIA: Nothing additional at this point.

MR. KUSHNER: OK. So I'm looking at some of the questions that came up. First of all, the certification. So this isn't certification by a neutral party. This is certification that the AJC would be giving to its staff. So we're just offering you a sample certificate that you would then complete to say, "Benjamin Kushner has completed the module called keeping precise and effective case notes" and it's signed by the – either the director or whoever you decide should be signing the certificate and that's awarded to the individual.

Maybe you're going to do it for the individual modules of training. Or maybe after your staff member has finished all four you would issue something saying they completed the case counselor training modules.

John, would you have any idea or opinion on whether they should be individually awarded or awarded together?

MR. SOUSA: It should be individually. We have the career ready 101 that we use in Massachusetts and all of our staff had to be trained – I mean, they had to do their own testing and all of that and they get their own certification and that's what we use in our centers for customers to come in to utilize the career ready 101.

MR. KUSHNER: Great. There's a question here about someone who doesn't work for AJC would be interested in getting a certificate. So I have a recommendation on this. So obviously you would only be getting the certificate because it's awarded by an AJC. So you'd only be getting a certificate if it was awarded and you were working at an AJC.

So here's my recommendation. If you're someone who wants to work for AJC – you're – you're looking for work as a case counselor you could say in your interview, you could say in your cover letter, you could write into your resume that you've – that you've seen the training or that you've gone through the training in these four modules and you could list the modules. You can't say that you've been certified because you weren't but certainly you could say that you've had the experience of those training modules.

Let's see if there's any other questions. Again to be clear these are certificates that would be awarded in person to the individual from their AJC. So it could be their AJC manager.

There's a question to John about the computer instructor. "When you have computer sciences classes for your customers, who is actually doing the instruction? Is it someone who works for the AJC or is it someone who works for a local community college?"

MR. SOUSA: The individual works for the AJC. It's one of our staff members that teaches the computer classes.

MR. KUSHNER: Someone is asking me about what I mean, by conducting personal business. So, you're at work and obviously there's a degree of personal business that goes on that you have to take care of. Your doctor's calling with results from a test. Your child's school is calling that there's an emergency at the school. So that kind of personal business. If there is personal business that you can schedule the recommendation is that you schedule it in the afternoon and that you set specific times for it so that it doesn't become a rolling, all-day, having to go back to personal business. I hope that answers your questions.

"How many training modules are there?" There are four. One of them relates to keeping precise and effective case notes. Another one, understanding the various career services. So that would be basic, or individualized or follow-up. Another one is improving time management for case counselors. And another one is knowing what employers want for case counselors.

"Is this a national certification?" No. This is awarded specifically by your AJC. So in terms of transferability of the certificate the new employer would have to judge whether or not they see a value in the fact that your previous employer awarded you a certificate of completion.

"When will the training modules be available?" I'm suspecting next week sometime – probably at the end of the month. They'll all be located – again, they'll all be located at the same website, the same URL that you used to download the recording of this webinar. So if you would go back to where you would download the recording you would also see all of the deliverables right there.

OK. Any closing thoughts, Kate? I think that we're using up our time?

MS. BANIMENIA: Right. We are getting lots of questions about when the materials will be available. So just to reiterate again, they are free, they will be open source and available via the link to this webinar in a short amount of time. Again it's just for the job center's usage so it's not a national certification or anything like that. Just for your own personal use to ensure your staff has some minimal amount of case management training.

MR. KUSHNER: Great. I just wanted to take moment out to thank John very much for your participation. It was important that we had someone speaking from the front lines with us, and so thank you, Kate, for your help from Region 1.

MR. SOUSA: Thank you.

MS. BANIMENIA: Thank you.

(END)