

**INTEGRATION FORUM**

**APRIL 15, 2010**

**POLICIES**



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Chester J. Culver, Governor  
Patty Judge, Lt. Governor  
Elisabeth Buck, Director



**WORKFORCE SYSTEM POLICY – WSP-0801**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** August 28, 2008

**Topic:** Iowa Integration Policy

**Effective Date:** Immediately

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## ***Iowa Integration Policy***

### ***Purpose***

This integration policy shall provide guidance to local workforce regions for the development of a regional workforce integration policy, including the minimum state requirements set forth herein.

### ***Background***

Iowa's economy is changing rapidly. While the state creates new jobs which often demand more technical skills, other traditional occupations are dead or dying, particularly in traditional manufacturing. An economy which was once based upon work history is now based upon work skills. Workers with abundant experience and epic work ethics often do not have the skills to attain family-sustaining wages. Moreover, employers are experiencing a shortage of skilled workers, often citing a deficiency in even basic or foundational skills. Iowa has an aging workforce and young people are leaving for

oceans, mountains and better paying jobs. In short, the competition for skilled workers has become global. For Iowa to compete and thrive in this environment, its workforce system must have the capacity to help raise every worker up one level in their skills.

Within this competitive environment, in August 2008, five of Iowa's regional one-stops are not physically collocated. Many other one-stops have co-location amongst important partners, but may have limited degrees of cooperation or collaboration. Some one-stops simply house partner roommates. Funding also has been a challenge for Iowa Workforce Development and all of its partners, particularly the local partners funded through the Workforce Investment Act. Strengthened partnership is required to meet the workforce challenges facing the State of Iowa in a climate of limited resources and threatened funding. And a model with greater flexibility is needed to facilitate better customer service and efficiency. Iowa's workforce delivery system is currently based upon a 1990's model of self-service in a referral-system one-stop. It is determined that this is not the most effective system for meeting the workforce challenges in the Twenty-First Century.

With this policy, Iowa Workforce Development has undertaken the comprehensive development of a new service delivery model. Such a model focuses on quality integrated services to customers, as opposed to operating from program of funding silos. Under this model, all local offices are integrated into functional units and are not separated by program of funding stream.

The goal of Iowa Integration is: All workers need to know their skills, have an opportunity to grow their skills, and get the best job possible with their skills.

While this policy is undertaken because it is the right thing to do, it should also be noted that the State Legislature passed House File 2699, Iowa Workforce Innovation legislation with requirements to develop a plan by January 1, 2009, and recommendations for:

- Coordinating the workforce delivery system in a more efficient, cost-effective manner while improving services for customers;
- Co-location and integration of all workforce and job training programs;
- Improving the effectiveness of the regional workforce system.

At a minimum, this legislation sets a goal for at least one certified one-stop center in each of the fifteen workforce areas by the year 2012.

With these imperatives and requirements in mind, the following document outlines the initial statewide integration policy elements.

### ***Integration Objectives***

The *operational* objectives are:

1. Emphasis on skill development for all customers: know their skills, grow skills

and get a job based on their skills; thus helping everyone raise themselves up one level.

2. Skill development and training opportunities for lowans that are based upon employer demand, occupational forecasting and labor market information.
3. Develop a demand-driven system, ensuring that services within the workforce centers are valuable to employers.
4. Provide a better return on investment of public funds by improving the quality; increasing access to services; and directing more resources to customer service.
5. Ensure service delivery is innovative and data driven through the use of comprehensive labor market information and analysis of local, state and national economic indicators.
6. Improved customer service processes; efficiency and flexibility in managing customer flow; and increased use of automation tools and resources to support staff and customers.
7. Advance the skills and job satisfaction for employees and optimize work flow across workforce development staff.
8. Further link workforce, economic development and education by developing shared goals and emphasis.
9. Improve overall performance: beyond program outputs to include outcomes, quality and process evaluation; and continuous improvement as a standard operating procedure.

### ***Transition Process***

The Iowa integration model will be built on promising practices from around the country – adopted and customized for optimal impact in Iowa. A “learning lab” process will be utilized to incorporate local input while testing and improving elements of the model prior to statewide implementation.

The State Workforce Board Advisory Group – made up of Board members, and representatives from the Employers Council of Iowa and the Association of Iowa Workforce Partners - will provide initial and ongoing feedback, advice and comment on all aspects of the integration model, plan and strategies.

A State Leadership Team sets overall direction, and establishes the integration model; policy development; minimum statewide standards; removes barriers, and, where necessary, provides resources to convert each center to the integration model.

An Integration Team will be established to help facilitate conversion of each center (after the Labs) and will include subject matter experts from Human Resources, IT and I-Works, Premises, different programs (i.e., WIA, employment services, unemployment insurance) and local learning lab participants. This group will provide technical and capacity building support to each of the centers – based on participation and learning from the labs. Each region, starting with those that will have a Learning Lab, will have a local Leadership Team that determines and implements all the local level decisions.

Following the Learning Labs, centers will be phased into the model; the integration transition will be facilitated in each center by the State Implementation Team. As the model will be finalized after the Learning Labs and will include minimum statewide standards (to be finalized based on these labs), centers will not be able to convert to the model without participation of the Implementation Team.

In combination – stakeholder advisors, state-level guidance and support, and localized input on customizing testing and improving the model – Iowa is assured a solid, well-structured integration initiative.

The integration transition will adhere to the state mandate to maintain operations at all current Workforce Center locations; will not affect the state's regional structure; and will not cause job loss for any currently employed workers.

### ***Service Integration***

The integrated service delivery system has three major components:

1. Integrated customer pool which ensures that all customers are registered simultaneously whenever eligibility permits in the performance calculation of specific workforce development programs.
2. Integrated customer flow that establishes a sequence of demand-driven, skill-based services for all Workforce Center customers using a customer-driven initial service triage which includes three customer cohort groups.
3. An integrated staffing approach that provides services to the integrated customer pool as they are served through the adopted, integrated customer flow.

### ***Co-enrolled Customer Pool***

Iowa will be transitioning to and adopting relevant policy for maximized co-enrollment of customers in order to create the common, integrated customer pool. This requires co-enrollment in the WIA adult performance pool early in the customer flow model – at Membership - thereby increasing the number of customers receiving skill improvement and training opportunities.

### ***Common Customer Flow and Service Cohorts***

The Iowa integration model will include a common customer flow that is adapted and customized for each center based on unique workforce center characteristics, such as: customer traffic, staffing, and office space issues.

The customer flow model is designed to simplify and standardize processes for customer movement through different common functions in a center; ensure maximum/ever increasing numbers of customers served; include customer choice for service delivery methods and processes; ensure all customers get information necessary to obtain required services; eliminate duplication to extend resources; and is flexible and adaptable.

Customers will flow sequentially through three functionally-organized service units: membership, skills development, and recruitment & placement. In addition to this state-level minimum standard, others will be developed. Each center will be developed to meet the state minimums and then adapt and adopt additional standard operating procedures based on the specifics of that center. The statewide standards will be drafted and tested in Learning Labs, and then finalized and adopted for statewide implementation.

The customer flow model incorporates a methodology to initially identify customer service needs, and provide immediate engagement and connectivity to services during the customer's first visit. Based on customer-driven initial service triage, three customer service cohorts will be established and standardized in each center. In general, these cohorts are: Career Development, for customers with limited skills and work history; Career Advancement, for customers with limited skills, outdated skills, work history without advancement, and/or inconsistent work histories; and Employment Express, for customers with job goals, in-demand skills, capacity to generally organize a job search, use labor market information and create job search tools; and consistent work histories.

### ***Additional Service Integration***

In addition to Wagner-Peyser, Trade, Veterans, New Iowans, and WIA Title 1 Adult and Dislocated Worker programs, the Iowa service integration will, in the transition phase, adopt standards and processes for integrating customers of Unemployment Insurance. The centers shall continue to provide Unemployment Insurance services. The integrated system, however, shall treat Unemployment Insurance recipients as "job seekers" rather than "claimants." PROMISE JOBS shall eventually be transitioned into the integration model.

Beyond the transition phase, or within each center as can be agreed upon by co-located partners, integration of other services will be developed with each relevant partner. This may include, for example, Older Worker programs, Vocational Rehabilitation, Job Corps, etc.

## ***Integrated, Functionally-Aligned Staff and Supervision***

The common customer flow will be used to create functional descriptions, and staff will be deployed to provide services within a functional unit. Regional leadership teams will ensure that staffing is adjusted to meet customer needs and traffic.

Functions and staffing for regional leadership teams will be determined region-by-region, but will include staff from multiple funding sources, which may be a 28E position, or a combination of staff funded by state and/or local programs. Based on reorganization of staff into functional teams or roles, functional supervisors will be designated to operate and oversee the day-to-day duties of those staff assigned to their teams. This functional supervision policy may include situations whereby state-funded staff are supervised daily by locally-funded staff, and vice versa. Personnel transactions such as performance evaluations, disciplinary actions, pay increases, etc. are maintained by the staff person's employer. Additional clarification and instructions will be documented and distributed prior to implementation.

In large centers, staff will work in functional teams: Membership, Skills Development, and Recruitment & Placement. Teams will be integrated with staff from multiple funding sources, at a minimum to include state and locally-funded programs, and staffing from other partners as can be developed in each center. Depending on the size of the teams, there may be functional team leaders.

In centers with approximately five or fewer staff, the functions will be covered by combination of full-time assignments, all staff covering all functions and scheduled to meet center traffic; or a revolving assignment, based on regional leadership team determination.

The functional roles or teams are:

### **Membership Function**

Staff serving in the membership function greet and direct customers; provide the initial services triage and recommend a services cohort; collect initial registration data, facilitate initial skills assessment, and connect customers with the Skills Development team/function, and initial service delivery.

### **Skills Development Function**

Staff in Skills Development provide additional assessment of customer needs and support requirements; when needed, provide comprehensive skills assessment and/or verification; facilitate career and job search planning; deliver and/or connect customers to skill building services covering work readiness skills, basic skills, computer literacy skills, occupational skills and job search skills; oversee and facilitate self-service delivery and assist customers in development of job search skills and tools.

## **Recruitment & Placement Function**

The recruitment & placement role/function includes services to job-ready job seekers, and services to hiring employers. For job seekers, functions include: job search information, plans, support and advise; job development; assessment of job search activities; automated job matching; and referrals and hiring process support. For employers, functions include: job orders and consultation; being responsive to new hiring practices; implementing pre-referral standards (skills, screening); a proactive search for candidates; and customized recruitment services.

## ***Learning Lab Implementation***

As previously mentioned the Iowa integration model will be built on promising practices from around the country – adapted and customized for optimal impact in Iowa. Implementation features a “Learning Lab” process to incorporate local input while testing and improving elements of the model prior to statewide implementation.

Five Learning Labs will be designated based on consideration of a number of different items: 1) center must have co-location of state and local programs; and 2) varying criteria including: number of colocated partners; office size; geography; office readiness and progress beyond “co-location.”

Learning Labs receive the following facilitation:

- Establish and formalize operations for center Leadership Teams, and facilitated Leadership Team meetings to process decisions and apply the integration model.
- Review and planning for “functional supervision”.
- Consulting on creation of functional teams: size, assignments, team leaders, and clarification of the functions for each team and the interactions between them.
- Development of all facility-based integration requirements: customer flow, including recommendations for floor plan impact; team placement (where desks will be); reorganization of “resource rooms” and service delivery areas if necessary/when feasible.
- Protocols for implementing integration model: common customer pool; applying service delivery standards; customer visit/traffic management; and addressing other issues as they arise.
- Planning to meet product/service standards.
- Support in development of unified center procedural documentation, and other documentation development and/or review of materials supporting Lab integration.

## ***Activities for Non-Lab Centers***

All Regional Leadership teams not involved in a Learning Lab will participate in one or more ways from the launch of the initiative, depending on a number of items:

- Take action to create co-location arrangements with at least the WIA service provider(s) if not already completed. This may involve leases, revised cost-sharing plans and MOUs; physical moves (and moving services), etc.
- Initiate development of a Local Leadership Team based on the model, and begin initial planning for functional teams; cross training; customer flow and impact on office layout; and other preliminary activities as identified.
- Participation, as learners, in various activities at the Lab sites: Leadership Team meetings, staff training and meetings, office redesign activities, etc.
- Site visits to various Learning Labs at different stages of implementation.
- Document review for Learning Labs to ensure clarity and completeness of documents created (i.e., procedural manuals).

The State Leadership Team and Integration Team will devise a method for advising and communicating with centers that are not Labs in order to determine which of these activities each center will be involved in.

## ***Performance and Impact Evaluation***

In addition to federally mandated program performance measures, Iowa will adopt evaluation methods for quality and process components of the workforce development system.

## ***Data Management***

Integrated partners shall transition to a common data management system (IWorks).

## ***Branding***

A taskforce of state and local staff will be initiated to develop statewide branding standards. This taskforce will be convened and operate simultaneously with the period of Learning Lab operations.

## ***Other***

Additional clarification and guidance shall be issued as necessary through workforce system policies.

Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



## **WORKFORCE SYSTEM POLICY – WSP-0901**

**To:** State and Regional Workforce Boards  
WIA Service Providers and Regional Managers  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** February 9, 2009

**Topic:** Iowa Works Integrated Membership Process  
and Co-Enrollment Policy

**Effective Date:** Immediately

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# ***Integrated Membership Process and Co-Enrollment***

## ***Purpose***

This Membership Process and Co-enrollment Policy shall provide guidance to service providers in the Iowa WORKS system regarding this key function (membership) and significant change to “intake” procedures used in Centers. This policy is consistent with the purpose and objectives provided in *Workforce Systems Policy WSP-0801*.

## ***Background***

Many recent activities continue to move the publicly-funded workforce system into increased integration of services across multiple programs. In 2006, USDOL issued TEGL 17-05, Common Measures Policy, which clarifies many elements related to

performance accountability, including a broadened definition of “participant,” and conditions for inclusion of a participant in multiple (WIA, WP or other partners) program performance calculations.

Here in Iowa, House File 2699 passed in 2008 requires coordination of the workforce delivery system in a more efficient, cost-effective manner while improving services for customers; collocation and integration of all workforce and job training programs; and improving the effectiveness of the regional workforce system.

The Iowa *WORKS* system has adopted a demand-driven, integrated services model to help achieve the House file 2699 requirements. Three basic elements define this model:

- Integrated Customer Pool – All Center customers will move through a standardized process that co-enrolls them into multiple programs based on eligibility. This unified customer pool will be shared and served by multiple partners within the Center.
- Integrated Customer Flow – Based on initial assessment, customers will progress through services in a unified, standard flow organized by “function” rather than “program”: membership services, skill development services, and employment services. Within this flow, three general service cohorts exist: career development, career advancement, or employment express.
- Integrated Customer Service Functions/Teams – Iowa *WORKS* partner members will contribute (as appropriate) to service delivery organized by function rather than program, (in teams if staff numbers are suitable). As a result, staff in each office will be assigned to the membership function/team, skill development function/team, or employment function/team; OR, a combination of function/teams as appropriate for staff size and duties.

This policy document details guidance related to the Membership function, which includes activities related to the “integrated customer pool.”

## **Objectives**

In general, the main objective of integrated service delivery is more customers receiving skill-building services – which are critical to our local, regional and statewide economy, and necessary to meet employers’ needs. What now function as separate employment services/programs and training services/programs need to be better coordinated so that all customers have access to both.

The overall integration model, and key components of the Membership process, are designed to impact this and other operational objectives: improved access to services; increase efficiency in use of limited resources by elimination of duplication and better

management of customer flow; and improve performance -- beyond program measures to include evaluation and improvement of quality and process.

Core to meeting these objectives is an increase in customers who receive staff assistance in determining, accessing and utilizing Iowa *WORKS* employment and training services. This distinguishes our staff – their assistance, knowledge and abilities from services that can be received self-service or offsite – i.e., via the internet. In addition this increase in staff assistance optimizes the value-added attributes of staff in these Centers. For example, it is the intent of integrated service delivery to decrease staff time committed to data entry and “tracking”, so that more time can be dedicated to customer interaction, service delivery and support. To that end, most standardized Membership processes related to data entry are completed by customers and facilitated by staff, versus the other way around. And in the near future, a “swipe-card” data entry system will decrease time spent on this function by either customers or staff – again increasing the focus and resources on service delivery.

### **Policy Components**

1. All Centers will operate a standardized **Membership function** which is a series of process steps delivered to each customer to: 1) welcome and determine the customer’s purpose for visit; 2) co-enroll into multiple programs; 3) initiate/ promote service delivery; and 4) ensure ongoing customer contact to maintain members’ active participation in services.
2. Centers will assign staff from multiple funding sources/programs to the membership function (where applicable), and any staff assigned to Membership will occupy work stations in the “Membership” area of the Center (i.e., adjacent to the main entrance.)
3. **Co-enrollment** into multiple programs has three primary determinants: eligibility, receipt of at least one service delivered with “significant” staff-assistance, and funding sources involved.
  - a. Eligibility requirements are established by regulation for each program; and determinations will be made simultaneously for multiple programs with each individual center member -- to determine which programs they are participants of, and what services they are eligible for.
  - b. The Membership process has been designed to ensure that each customer who comes into a Center for employment and training services receives at a minimum, the following staff-assisted core service:
    - Assessment of a participant’s career objectives, education or skills in order to achieve (any of) the following:

- Assist participant in deciding on appropriate next steps in the search for employment, training and related services, including job referral
- Assist participants in accessing other related services necessary to enhance their employability and individual employment related needs (which is also an ongoing, shared staff responsibility across all other Center staff.)
- Assist participants in assessing their personal barriers to employment; (which if needed will be delivered by Skills Development)

Delivery of the above staff-assisted core service meets the TEGL 17-05 definition of “significant” staff assistance (regardless of length of staff time involved), and as such is one of the triggers for program enrollment.

- c. Based on eligibility determinations and receipt of a service with significant staff assistance, co-enrollment into multiple programs occurs simultaneously into each program that in whole or in part contributes funds. According to TEGL 17-05, *“the determination as to whether or not to include a participant in WIA, WP or other partner programs’ performance calculations is based on whether the services, staff, facility or activity was funded in whole or in part by WIA, WP or partner programs.”*

In co-located Centers, at a minimum, it is determined that all core services are funded by multiple programs, i.e., at a minimum, both WP and WIA funds.

In terms of the membership policy in Iowa, items (b) significant staff assistance and (c) co-funding have predetermined application to all members. Therefore, eligibility determinations are the only unique, individualized activity affecting co-enrollment decisions. When eligibility permits, every member must be co-enrolled into all qualifying programs.

4. The full Membership process applies only to customers seeking employment and training services, and does not apply to customers visiting the Center for other services. In particular for example, unemployment insurance customers who file claims in the Centers will be offered use of the Center’s employment and training services, and if declined, will not proceed through the Membership process. In cases where customers in Centers resist the membership process (i.e., “I only want to use the computer...”), it is expected that Membership staff will strongly recommend the additional benefits and services available to members. A process for tracking these customers will be developed, as they are an ongoing “membership recruitment” pool.
5. Having met the three determinants (above) for co-enrollment, this means that each member is in each of the relevant programs’ **performance pool**. The only exclusion described in TEGL 17-05 -- those customers that have only received

self-service or informational activities – does not apply to members, as all will go through the Membership process. In Iowa, self-service or informational activities applies to customers that only use electronic services and do not use Center services.

6. In addition to co-enrollment procedures, the Membership function includes provision of the required staff-assisted core service described above: initial assessment. Based on a standardized list of customer questions, this initial assessment will triage customers into one of three recommended service cohorts: Career Development, Career Advancement, or Employment Express.

A minimum list of required services aligned with each cohort will be established, and Centers will be encouraged to further develop and customize services to the common needs of customers in each cohort. Membership staff will review and recommend these services to customers, and transition members to the Skills Development function/team.

7. Center Leadership Teams will ensure that the Membership function/team staff provide complete, consistent data collection, I\*Works data entry, verification and storage of relevant customer information to successfully apply the membership processes and functions, including cohort coding and entering first activity which creates the “date of participation”.

Details of the process and procedures for the standardized Membership function will be Lab developed and tested, and published in a “technical bulletin.” This document will also include program-by-program eligibility requirements.



Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



**WORKFORCE SYSTEM POLICY – WSP-0902**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** February 9, 2009

**Topic:** Iowa Integration Policy Regarding Local Leadership

**Effective Date:** Immediately

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***Integration Local Leadership Policy***

***Purpose***

To provide guidance to the Iowa Works system on the leadership structure and functional supervision roles and responsibilities in integrated offices throughout Iowa. This guidance is intended to help distinguish “organizational” roles and responsibilities from “functional” roles and responsibilities. Specifically, these guidelines detail those responsibilities that may be designated by “function” and those activities that -- due to an organizations’ regulation, pre-existing policy or union agreements -- will NOT change existing specifications: the designated person with authority, the operation, or method.

## **Regional Leadership**

As a result of Iowa's integration efforts, the IowaWORKS system has adopted a functional supervision model in order to achieve the vision of full service integration and seamless service delivery.

Each Region shall be organized with the following functional job descriptions for regional leadership:

- **Regional IowaWORKS Director:** The Regional IowaWORKS Director is responsible for all Iowa Works operations in the region. This function will utilize the states' 28E legislation, and will therefore be funded by both the local provider and the state. The process for the state and RWIBs to use to make the selection of the Regional Area Director is detailed in a separate policy document, WSP-0908 Functional Descriptions.
- **Operations Director:** Under the direction and functional supervision of Regional IowaWORKS Director, the Operations Director shall ensure the overall success of one or more Iowa Works Centers. An Operations Director will be used in any site with significant numbers of staff; or one person may be designated as the "Operation" director for multiple sites with fewer staff members.
- **Team Leaders in Membership, Skills Development and Recruitment & Placement:** In addition to participating as a team member, Team Leaders shall lead, and functionally supervise day-to-day activities of staff assigned to those teams. Note: due to variations in size, not all Centers will have teams (although all staff will be assigned by function), and not all teams will have individual team leaders, and may in fact be functionally supervised by the Operation(s) Director.
- Any staff person designated to fulfill one of the foregoing functional descriptions will be pre-determined meet the requirements for leadership and supervisory roles.

In order to integrate services and staff, these staff will serve as "Functional Supervisors" to staff, regardless of funding stream or formal job title (as designated by the employer). In other words, staff funded through the Workforce Investment Act may functionally supervise state-funded staff and vice versa, within the specifications detailed below.

## **Supervision**

The term "Supervisor" has two distinct applications in this policy:

*Formal* supervisor -- refers to the organizational structure and job classification of supervisor as defined by each individual's employer (i.e., Iowa Workforce Development

or the local WIA employer). It is used in this policy to distinguish those roles and responsibilities that will be maintained under existing organizational specifications – such as approval of time and attendance, processing of leave requests, performance evaluations, etc. While several activities will remain under the formal supervisor’s authority, for successful integration of services, most of these activities require coordination and consultation with the relevant “functional supervisor.”

*Functional supervisor* -- applies in integrated Centers to distinguish those activities that will be related to the function assigned to each individual. In general, the functional supervisor will organize, coordinate, direct and review the “day-to-day” activities, tasks and work of those assigned to the function he/she oversees.

In other words, for each individual, the formal supervisor is not changed by this policy, and is determined by the individuals’ employer; the functional supervisor is based on whatever function (i.e., Team Leader or team member) the individual is assigned to, as determined by the Regional Leadership Team’s application of the integration model. The Regional Iowa *WORKS* Director “functionally supervise” Operation(s) Directors; Operation(s) Directors “functionally supervise” Team Leaders; and Team Leaders “functionally supervise” all individuals assigned to their team.

#### A. Functional Supervisor

The daily activities of the Functional Supervisor include, but are not limited to, the following:

- Schedule meetings and maintain minutes;
- Organize and maintain a schedule for staffing assigned function within the Iowa Works Center(s);
- Direct and assign/reassign staff in the office based upon operational needs, and in consultation with other Team Leaders/functional supervisors; Receive and respond to internal/external inquiries;
- Prepare training for all staff;
- Draft and submit reports required of the Iowa *WORKS* system ;
- Monitor and track services assigned in the Iowa Works facilities;
- Identify and facilitate the timely resolution of problems, complaints and other issues;
- Communicate and coordinate with formal (state or local)supervisors on issues that fall under the authority of the formal supervisor
- Collaborate with other leaders and formal supervisor(s) to increase communication

#### B. Formal Supervisor

The activities of the Formal Supervisor(s), who may be state and/or locally-funded, include, but are not limited to, the following:

- Hire staff;
- Discipline and/or terminate staff;
- Conduct performance appraisals;
- Approve schedule of staff assigned to Iowa *WORKS* Center;
- Approve staff payroll;
- Approve staff vacation and other leave requests;
- Approve staff travel requests and reimbursements;
- Respond to formal and informal complaints of harassment or discrimination made by and/or against staff;
- Administer EEO and AA efforts required by federal and state law;
- Collaborate with the functional supervisor, Regional Iowa *WORKS* Director, Operation Director and Team Leaders to increase communication among one another and all staff in order to facilitate efficient and effective operations.

Again, as noted above, many of the formal supervisor activities will need coordination and communication with functional supervisors for efficient and effective integration operations.

In the case of state merit staff, the Formal Supervisor is the contact for state merit staff on personnel matters, including compensation, personnel actions, terms and conditions of employment, performance appraisals, and accountability of state merit staff employees. Day-to-day operational and workflow matters, however, shall be directed to all staff by the Functional Supervisor. Similarly, locally-funded staff shall report only to their Formal Supervisor regarding matters as outlined above.

### ***Examples of Integration and Execution of Supervisory Roles***

#### A. Hours of Work/Work Schedule

Functional Supervisors must:

- Determine operational needs and the work schedules necessary to meet those operational needs.
- Obtain approval from the formal state supervisor for the hours of work and work schedule proposed for staff.
- Assign employees to a schedule compatible with operational needs.

Formal Supervisors Must:

- Cooperate with the functional supervisor to determine the hours of work and schedules for staff.
- Monitor subordinates to ensure they are working all scheduled hours and/or complying with any notice requirements for requesting use of accrued leave or benefits.

- Take appropriate actions, including discipline, when staff fails to abide by the assigned schedule and/or the requirements of attendance and leave policy.

## B. Holidays

Functional Supervisors must:

- Determine the appropriate staffing needs for all holiday periods, including the day before and day after each holiday and obtain approval from the Formal Supervisor.

Formal Supervisors must:

- Notify employees, functional supervisors and Regional and Site Coordinators of the annual holiday schedule in a timely manner.
- Cooperate with the functional supervisor to determine the appropriate staffing needs for all holiday periods, including the day before and day after each holiday.

## C. Performance Appraisals

Performance Appraisals are a case example of the communication and coordination that will be required between functional and formal supervisors for integrated services to be successful.

Functional Supervisors must:

- Document and communicate staff performance to the formal supervisor to assist in measuring employee progress.

Formal Supervisors must:

- Translate the regional strategic plan into individual employee goals that are specific, measurable, achievable, and framed as outcomes or results.
- Provide regular, frequent coaching and feedback to employees based upon individual observations and functional supervisor input.
- Identify development needs of each employee and establish plans to address those needs.
- Conduct an annual written performance appraisal pursuant to the policy and procedure established by the individual's employer.

## D. Discipline

Functional Supervisors must:

- Cooperate in any administrative investigations into allegations of misconduct.

Formal Supervisors must:

- Consistently implement and enforce all workforce rules and standardized policies.
- Monitor the performance and behavior of subordinates.
- Conduct or cooperate in any administrative investigations into allegations of misconduct.
- Recommend or impose discipline in accordance with the collective bargaining agreement (if applicable), laws, rules and policies.

## ***Policy***

This policy is not all inclusive. Rather, it serves as an example of the interactive nature of the functional supervisor, formal supervisor and regional leadership team. Employees with questions about the organizational structure of their office or their direct reporting authority should contact Human Resources at (515) 281-3315.

Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



**WORKFORCE SYSTEM POLICY – WSP-0903**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** February 9, 2009

**Topic:** Iowa Integration Policy Regarding Premises

**Effective Date:** Immediately

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***Integration Premises Policy***

***Purpose***

This policy shall provide guidance to local workforce regions for the physical layout, floor plans and customer flow in workforce system centers.

***Contents***

The operational framework of an integrated workforce system requires the following key elements with respect to premises layout and floor plans:

1. Integrated staff members shall work in functional teams, or be assigned a specific set of functions within the model (as not all Centers are large enough in terms of staff size to operate in “teams”).
2. a) Staff will work in close physical proximity to other staff performing the same function or on the same team; regardless of program funding stream, and:  
b) Staff will have similar office space as other members providing the same functions/on the same team.
3. Staff must have open and unhampered access to: a) other staff performing the same function; and b) customers receiving services under the function.
4. The staff/team shall be located in the area on a floor plan that is the same area where customers will receive the services of the team/function.

In most cases, some premises changes shall be required in workforce system centers to reflect the foregoing policy.

Nothing in this policy shall, in any way, alter Iowa’s rules, standards or ethical principles relating to confidentiality of customer data and information. Furthermore, at the customers’ request, staff will continue to access and use alternative office space if needed to increase the privacy of any transaction.

The goal of this policy is to encourage and foster teamwork amongst workforce system staff across program boundaries in order to provide more direct and immediate contact with customers and deliver more needed services to more customers.

Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



**WORKFORCE SYSTEM POLICY – WSP-0904**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** February 9, 2009

**Topic:** Leadership Selection Integration Policy

**Effective Date:** Immediately

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***Leadership Selection Policy***

***Purpose***

This policy shall provide guidance to local workforce regions for the process for selecting regional leadership teams.

***Contents***

The State Leadership Team has set forth the following process for selecting regional leadership teams.

1. A designee from the State Leadership Team shall determine through job title and description, which managers from any of the integrated programs are

qualified to serve in the functional capacity of either a Regional IowaWORKS Director or Operations Director.

2. A designee from the State Leadership Team shall informally gage interest and suitability for the functional descriptions through discussions with the individuals identified and their superiors if appropriate.
3. If there is more than one person who is qualified, suited and interested in serving in a leadership function – and resolution cannot be achieved informally - interviews shall be conducted to determine which individuals shall serve in which capacity with the goal of entering into a 28(e) arrangement between the parties involved.
4. The interview shall be conducted by a representative from the Sate Leadership Team and a representative from the local WIA provider. Ideally, a representative from the Local Board shall also sit in on the interview in an advisory capacity.
5. If the parties cannot agree upon a candidate, the parties shall determine a neutral member from the State Workforce Board to help them resolve the impasse.
6. Once the Local Leadership Team has been selected, the team shall request that the local RWIB endorse the Leadership Team plan and refer that endorsement on to the State Workforce Board for endorsement.

**NOTE:** This process is not intended to create an opportunity for advancement or demotion for any leadership involved. Rather, the process is intended to prescribe functional roles to individuals who are already in a classification which would allow them to serve in a role on the functional leadership team.

Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



**WORKFORCE SYSTEM POLICY – WSP-0905**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** February 9, 2009

**Topic:** Integrated Marketing and Branding Policy

**Effective Date:** Immediately

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***Integrated Marketing and Branding Policy***

***Purpose***

To provide policy and guidance on branding and marketing activities for IowaWORKS centers and satellite sites.

***Background***

Integration brings workforce programs delivered by multiple partners across the state into one seamless system. This brought forward an issue of properly branding the system so as not to diminish the importance of any partners' individual brand. Iowa Workforce Development facilitated a focus group of WIA and IWD managers to discuss a new identity and logo design. As a result, a new, unified brand was developed for the Integrated System: IowaWORKS.

***Integration Objectives***

In order for the integrated IowaWorks system to be a success, it's important that all Iowans clearly recognize and identify with our new unified, integrated brand.

To achieve this goal, the branding activities of the integrated Iowa *WORKS* system will move forward as follows.

The use of the Iowa *WORKS* brand shall be governed by a set of exclusive and inclusive guidelines and requirements.

The Iowa *WORKS* brand shall be the **exclusive** brand used to identify the integrated centers. All signage, materials, etc will encompass the Iowa *WORKS* brand exclusively for delivering services within the workforce system when developed using funds that pass through Iowa Workforce Development. Funding sources that pass through Iowa Workforce Development will not be used to subsidize marketing, collateral materials, websites, advertising or other efforts that does not strictly adhere to the brand requirements as laid out below. This requirement will also extend to the independent IWD and WIA offices within a region containing an integrated one-stop and their sub-contractors.

The following are brand requirements for all programs and services within the **exclusive** requirements of Iowa *WORKS*:

1. All integrated service delivery systems must comply with the Iowa *WORKS* style guide, released on April 15, 2010, within six (6) months of becoming an integrated center.
2. The logo is a green/black logo. Any logos not complying with the color requirements must be removed or replaced.
3. Only Iowa *WORKS* signage shall be displayed both outside and inside the centers for programs and services within the **exclusive** requirements. Separate IWD and service provider logos should not be used in conjunction with the programs and services delivered within the Iowa *WORKS* centers. The style guide will provide additional information.
4. All outdoor signage, including billboards and other advertising mediums must use the green/black Iowa *WORKS* logo and must be approved by Iowa Workforce Development's Communications Office in advance.
5. The Iowa *WORKS* logo can be used by itself or with a pre-approved regional identification tagline under it. Any tagline used with the logo must be approved by IWD.
6. The Iowa *WORKS* logo is the only logo which shall be used on marketing materials developed and used to promote programs associated with the integrated system.

7. Business cards shall utilize a standardized format that contains only the IowaWORKS logo and adheres to the specific guidelines addressed in the style guide. The same guidelines exist for letterhead.
8. All telephone listings will be under the IowaWORKS name.
9. All regions will utilize the Website requirements in the style guide. Regional websites will be as follows: [www.iowaworks.org/region\(1-16\)](http://www.iowaworks.org/region(1-16)). Regional Websites will be housed on Iowa Workforce Development servers and be approved before launch.
10. All materials developed by Iowa Workforce Development will be available for order through the CICS - SIOR system.
11. All printed material paid for with funds flowing through Iowa workforce Development will contain the following:

Equal opportunity employer/program.

Auxiliary aids and services are available upon request for individuals with disabilities.

For deaf or hard of hearing, use Relay 711.

Iowa Workforce Development recognizes that a number of partners within the current One-Stop System will remain within the integrated system however the majority of their funding does not flow through the Department. While we encourage these partners to utilize the **exclusive** portion of the IowaWORKS brand requirements, it is fully recognized that the use of IowaWORKS cannot be a requirement. Because of this, IWD will work closely with these partners to incorporate IowaWORKS where possible and to ensure that when it is used, the brand standards are followed.

The following are **inclusive** guidelines for the IowaWORKS system. Local areas shall have control over the items below. However, local areas are responsible for ensuring any item specified in the following list **does not conflict with the previously identified exclusive brand standards**.

**Inclusive** brand guidelines include:

1. Community programs where the local workforce system is partnering with non IowaWORKS partners on local programs or initiatives.
2. Job fairs where IowaWORKS is a partner, not the primary sponsor.
3. Local events where additional organizations logos are needed to promote the activity.

A separate media and public relations policy will also be developed for the Integrated Workforce System.

Questions regarding this policy should be directed to Iowa Workforce Development's Communications Bureau at 515-281-5981.



Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



## **WORKFORCE SYSTEM POLICY – WSP-0906**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** May 29, 2009

**Topic:** Iowa *WORKS* Integrated Skills Development Process Policy

**Effective Date:** Final Draft: Immediately for Learning Labs

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# ***Integrated Skills Development Process Policy***

## ***Purpose***

This Skills Development Process Policy shall provide guidance to service providers in the Iowa *WORKS* system regarding this key function (skills development), and fundamental changes in service delivery procedures used in Centers. This policy is consistent with the purpose and objectives provided in *Workforce Systems Policy WSP-0801*.

## ***Background***

Many recent activities continue to move the publicly-funded workforce system into increased integration of services across multiple programs. Here in Iowa, House File 2699 passed in 2008 requires coordination of the workforce delivery system in a more efficient, cost-effective manner while improving services for customers; collocation and integration of all workforce and job training programs; and improving the effectiveness of the regional workforce system.

Iowa Workforce Development is implementing ***an integrated services model*** to ensure that:

- Businesses across Iowa have the skilled workers they need; while workers gain and expand skills in demand;
- Workforce services and processes prove to be more efficient and effective; and
- The workforce development system makes a relevant, valuable contribution to each region's economic vitality.

The integrated service delivery system has three major components:

- **Integrated Customer Pool** – All Center customers will move through a standardized process that co-enrolls individuals into multiple programs based on eligibility. This unified customer pool will be shared and served by multiple partners within a Center.
- **Integrated Customer Flow** – Based on an initial basic assessment, customers will progress through services in a unified, standard flow organized by “function” rather than “program.” Customers start with membership services (stream-lined program enrollment and initial triage); advance to skill development services (to build occupational and job seeking skills), and then find success in Recruitment & Placement services (with structured and facilitated job search).

Within this flow, customers will be recommended to one of three general service cohorts: Career Development for new workers; Career Advancement for workers in transition; and Employment Express to quickly return skilled workers to the workforce. Services will continue to be customized to meet individual customer needs.

- **Integrated Customer Service Functions/Teams** – Iowa *WORKS* partner members work together in this functionally-organized service delivery model. Staff from multiple programs in each office will be assigned to the membership function/team, skills development function/team, or employment function/team, or combination of function/teams as appropriate for staff size and duties.

This policy document details guidance related to the Skills Development function, which includes activities related to the “integrated customer pool.”

## **Objectives**

In general, the main objective of integrated service delivery is more customers receiving skill-building services – which are critical to our local, regional and statewide economy, and necessary to meet employers' needs. What now function as separate employment services/programs and training services/programs need to be better coordinated so that all customers have access to both.

The overall integration model, and key components of the Skills Development process, are designed to impact this and other operational objectives: improved access to services; increase efficiency in use of limited resources by elimination of duplication and better management of customer flow; and better performance beyond program measures to include evaluation and improvement of quality and process.

Core to meeting these objectives is an increase in customers who receive staff assistance in determining, accessing and utilizing Iowa *WORKS* employment and training services. Skill Development comprises a hub of employment and training service delivery. Process steps and procedures are designed to meet one of the core missions of the workforce development system: that all individuals have the opportunity to “know their skills, grow their skills and get the best job possible with their skills.” To that end, an assessment of skills is a universal service delivered to each member of Skills Development. The outcome of service delivery in the Skills Development area is a relevant pool of talent – with skills in demand and job-search know-how. When members have completed Skills Development, and have the tools and knowledge for an effective job search, they are introduced to the Employment Team/staff.

### ***Policy Components***

1. Members proceed through a structured process and flow, with opportunities and options sequenced to meet their needs.
2. Services are packaged together into service cohorts to meet the general, common needs of groups of customers in similar circumstances. The general menu of services initially recommended is based on the cohort, yet allows for customizing service delivery based on what works best for the member’s unique situation. Using service cohort groups does not mean stereotyping members, taking away choices and options, or forcing services that do not fit.
3. Many members require a comprehensive package of services – beyond what is available through workforce programs. Therefore, referrals (to other partner and community resources) are pursued and followed-up on.
4. Minimum service standards will exist to ensure consistency across the definition of services and by cohort (i.e. for resumes), and local areas are encouraged to expand and further customize services.
5. At a minimum, each member in Skills Development will receive a skills assessment that is appropriate to the service cohort; optimizes time and resources; and is sequenced in relation to the members’ needs. This is to ensure that each member has an opportunity to know his or her skills.
6. It is intended that each member receives a service at every Center visit, and the next service is scheduled at the end of every visit.

7. Procedures are designed to “model work” -- by adopting standards that are customary in the workforce and recruiting practices today: i.e., handshakes, use of computers and technology, electronic resumes, etc.
8. Skills development must be organized in ways that optimize methods of service delivery: facilitated self-service, groups and workshops. One-on-one service delivery is reserved for use when necessary for the member’s success, or required by the circumstances (as described in local operating procedures.)
9. Skills Development services will be delivered by teams, or multiple staff members (except in one-person offices), and so for consistency, structured processes for movement from core to intensive to training will be standardized and followed by all staff delivering Skills Development services.
10. Skills Development includes “membership management” activities designed to prevent long intervals between service delivery, lost members, and missed opportunities for revising service plans to meet changed circumstances. This ongoing member contacts will have minimum standards (i.e., at scheduled intervals, when certain criteria exists, a required member contact will occur.)
11. Within the Skills Development area, designated computers will be available for relevant service delivery. All member services are facilitated and monitored by staff to meet member needs. To that end, Skills Development team members will be scheduled for different “stations” (and related time slots):
  - a. “General Member Services” – managing the flow of members in Skills Development; monitoring and facilitating use of services in the computer area; welcoming new and returning members; etc.
  - b. “Individual Member Services” – meeting with members in work spaces for review and planning activities; updating member service notes and records; member contact and follow-up and other administrative functions.
12. Because the pool of members in Skills Development will be integrated and served by multiple staff, service management standards will be applied -- versus a one-on-one assignment of caseloads utilizing case management.
13. Based on state guidelines, local procedures and standards will apply to additional eligibility review, data collection and data validation for members in intensive and training services.
14. Service and member notes (i.e., “case notes”) on I-Works will be directed by minimum standards (for when needed, subject line, content, etc.)
15. The majority of functions/services are delivered by all Skills Development team members; however, when obligation or expenditure of program funds is

involved, local policy and practices apply and are followed. In addition, certain staff on the Skills Development team may be limited by program funding source to the category of members they may serve (i.e., Veteran Representatives.)

16. Veteran's priority of service applies to all functions of the Skills Development team, and local operating standards must ensure this priority is met.

Details of the process and procedures for the standardized Skills Development function will be Lab developed and tested, and published in a "technical bulletin."



Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



## **WORKFORCE SYSTEM POLICY – WSP 0907**

**To:** State and Regional Workforce Boards  
WIA Service Providers and Regional Managers  
Integration Advisory Board

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** June 24, 2009

**Topic:** Iowa *WORKS* Integrated Recruitment and Placement  
Team/Function Process Policy

**Effective:** Immediately for Learning Labs

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# ***Integrated Recruitment and Placement Policy***

## ***Purpose***

This Recruitment and Placement Process Policy shall provide guidance to service providers in the Iowa *WORKS* system regarding this key function (providing recruitment and hiring services to employers), and related changes in service delivery procedures used in Centers. This policy is consistent with the purpose and objectives provided in *Workforce Systems Policy WSP-0801*.

## ***Background***

Many recent activities continue to move the publicly-funded workforce system into increased integration of services across multiple programs. Here in Iowa, House File 2699 passed in 2008 requires coordination of the workforce delivery system in a more efficient, cost-effective manner while improving services for customers; collocation and integration of all workforce and job training programs; and improving the effectiveness of the regional workforce system.

Iowa Workforce Development is implementing ***an integrated services model*** to ensure that:

- Businesses across Iowa have the skilled workers they need; while workers gain and expand skills in demand;

- Workforce services and processes prove to be more efficient and effective; and
- The workforce development system makes a relevant, valuable contribution to each region's economic vitality.

The integrated service delivery system has three major components:

- **Integrated Customer Pool** – All Center customers will move through a standardized process that co-enrolls individuals into multiple programs based on eligibility. This unified customer pool will be shared and served by multiple partners within a Center.
- **Integrated Customer Flow** – Based on an initial basic assessment, customers will progress through services in a unified, standard flow organized by “function” rather than “program.” Customers start with membership services (stream-lined program enrollment and initial triage); advance to skill development services (to build occupational and job seeking skills), and then based on job criteria, find employment success based on job referrals from the Skills Development Team or the Recruitment and Placement Team (with structured and facilitated job search).

Within this flow, customers will be recommended to one of three general service cohorts: career development for new workers; career advancement for workers in transition; and employment express to quickly return skilled workers to the workforce. Services will continue to be customized to meet individual customer needs.

- **Integrated Customer Service Functions/Teams** – Iowa *WORKS* partner members work together in this functionally-organized service delivery model. Staff from multiple programs in each office will be assigned to the membership function/team, skills development function/team, or recruitment and placement function/team, or combination of function/teams as appropriate for staff size and duties.

This policy document details guidance related to the Recruitment and Placement function, which features providing recruitment and hiring services to employers.

## **Objectives**

With implementation of the overall integration model comes the opportunity to assess and improve on services to employers and regional businesses. Essentially the same operational objectives apply to development of this function: improved access to services; increase efficiency in use of limited resources by elimination of duplication and better management of customer flow; and better performance -- beyond program measures to include evaluation and improvement of quality and processes.

Core to meeting these objectives is assignment of dedicated staff to this function, (to work as a team in those Centers that include staff numbers that allow for this); specific identification of activities assigned to this function; and ensuring that these staff and their work adds value to the regions' recruitment and hiring activities. The outcome of service delivery in the Recruitment and Placement function is an growing list of employer customers that: 1) regularly receive recruitment and hiring services,

information and advice; 2) hire talent that is retained; and 3) are satisfied with the process and outcome of dealings with the Iowa *WORKS* system.

### ***Policy Components***

1. The primary focus of the Recruitment and Placement function is to offer and provide recruitment and hiring services to (individual and groups of) employers. The team/function is composed of staff dedicated to the function from multiple programs/funding sources (relevant to staff located in each Center.) The majority of functions/services are delivered by all Recruitment and Placement team members, unless there is an exception by local policy.
2. Region's may employ Business Marketing Representatives to lead the local Recruitment and Placement Teams and offer and provide comprehensive business services, including human resource consultation; recruitment and retention strategies; and workforce training services for business and economic development.
3. Activities of the Skills Development function are also impacted by employers due to the primary function of "transforming job seekers into job candidates through skill assessment, skill enhancement and job search skills and tools." The Skills Development and Recruitment and Placement teams will work closely together to ensure that services are relevant and meet employers' needs.
4. Services and service delivery methods are packaged together based on an "account management" model that recognizes "key" accounts. A general menu of "core services" that feature self-help and staff facilitation is available to all employers; with intensive and enhanced/training services also available based on the account management model, employer hiring criteria and needs.
5. Employer customers proceed through a structured process and flow, with service opportunities and options based on the account management model, hiring criteria and needs.
6. The minimum mandatory process steps for the recruitment services include: review of all job listings posted on IowaJobs; consultation on content and wages for the job listing; reset of the "display date" every 30 days; a total of 90 days for job listing until the job is deactivated.
7. Additional mandatory process steps for recruitment services exist for a) jobs that require additional recruitment steps, knowledge or criteria; and for b) vacancies that are listed by key accounts. These include additional candidate search, customized recruitment and frequent employer contact.
8. Minimum service standards exist to ensure effective flow of members between teams/functions in a Center. For example, all customers must proceed through the full Membership process before receiving Skills Development or Recruitment and Placement services; and members will

receive Skills Development services before receipt of services from the Recruitment and Placement Team.

In addition, since there is a fair amount of shared members between Skills Development and the Recruitment and Placement function, these standards will provide clarity on what services are provided to which members by which team.

9. As with all team functions, procedures are designed to “model work” -- by adopting standards that are customary in the workforce and replicate recruiting practices today: i.e., handshakes, use of computers and technology, electronic resumes, etc.
10. Also as applied to all other teams, Recruitment and Placement functions must be organized in ways that optimize methods of service delivery: facilitated self-service, groups and workshops; and provide the most efficient and effective use of these limited human resources.
11. Because employer customers and key accounts will be served by multiple staff, service management standards and service note standards will be applied --versus a one-on-one assignment of caseloads utilizing case management.
12. Recruitment and Placement functions include “membership management” designed to maintain contact with members receiving referral activities; and employer customer contact strategies designed to maintain “active, current” status. These ongoing structured contacts will be have minimum standards (i.e., at scheduled intervals, when certain criteria exists, a required customer contact will occur).
13. Service notes (i.e., “case notes”) on I-WORKS will be directed by minimum standards (for when needed, subject line, content, etc.)
14. When expenditure of program funds is involved (i.e., customized or on-the-job training), the relevant local or state fiscal policy and practices apply and are followed.
15. Veteran’s priority of service applies to all functions of the Recruitment and Placement team, and local operating standards must ensure this priority is met.

Details of the process and procedures for the standardized Recruitment and Placement function will be Lab developed and tested, and published in a “technical bulletin.”

Chester J. Culver, Governor

Patty Judge, Lt. Governor

Elisabeth Buck, Director



**WORKFORCE SYSTEM POLICY – WSP-0908**

**To:** State and Regional Workforce Boards  
Regional Workforce Manager  
WIA Managers  
IWD Staff

**From:** Elisabeth Buck  
Director, Iowa Workforce Development

**Date:** November 20, 2009

**Topic:** IowaWORKS Integrated Functional Descriptions

**Effective Date:** Immediately for Learning Labs

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## Integration Functional Descriptions

### Regional IowaWORKS Director

**Description of Functional Responsibilities:**

As described by the title, the responsibilities of the Regional IowaWORKS Director reach across all IowaWORKS workforce development activities and operations in a region. These activities and operations span across a variety of government programs and funding sources, and are now functionally aligned into an integrated service delivery framework that requires increased coordination. The Regional IowaWORKS Director works as a team with other members of the region's leadership team, most notably the Operations Director(s), to plan workforce development strategy, improve and ensure successful integrated operations and form alliances and partnerships within the region's community.

The Regional IowaWORKS Director has a significant role in community outreach, connections, coordination and communications related to ensuring the success of regional customer service plans, goals and center operations. Policy implementation, staff and resource allocation, and achieving performance measures all fall under the responsibilities of the Regional IowaWORKS Director; and these operational requirements are implemented through joint efforts among and between the region's leadership team.

All Iowa Works staff are expected to share their expertise and assist with other functions or perform additional tasks as the need arises.

**Primary Functional Tasks:**

1. Work in collaboration with the Operations Director(s) to ensure all decisions are made in the best interest of the region and in alignment with state, local and federal policies as well as the regional customer service plan.
2. Network with and act as resource person to local governments, businesses, local and regional associations, public and non-profit human/support service providers and the general public concerning development and operation of an effective workforce development system to meet the regions' needs.
3. With input from the Operations Director, aide the RWIB with development of the regional customer service plan.
4. Implement and maintain ongoing comprehensive public relations activities across all communities in the Region so there is public awareness and optimum utilization of the Iowa Works system, centers and services.
5. Work in conjunction with the Regional Workforce Investment Board (RWIB) and Operations Director, to ensure all IowaWORKS programs and services are successfully implemented within the common framework of integrated service delivery.
6. Act as the liaison between RWIB and Center staff, establishing a clearly identifiable communication loop.
7. In collaboration with the Operations Director, oversee implementation of IowaWORKS programs and policies, as they apply to the design and operations of all Centers in a region.
8. Monitor progress on the implementation of IowaWORKS policies, providing guidance and technical assistance to teams/staff as needed or requested.
9. In coordination with the Leadership Team, collect, analyze, synthesize, and summarize required information and submit federal, state or regional reports as required/requested.
10. Collaborate with all on-site partners for optimum coordination of customer flow, access to all services, non-duplication of processes, sharing of information and attainment of performance measures.
11. Along with the Operations Director, represent IowaWORKS integrated programs to the Coordinating Service Provider to ensure effectiveness of overall workforce development system in the region.
12. Establish good working relationships and serve as liaison with other community agencies, training providers and business associations to ensure effectiveness of the integrated system.

13. Ensure that interagency agreements such as MOU and CAP are developed, reviewed and updated as necessary, documenting changes.
14. In partnership with the Operations Director, ensure all system and program performance measures are met or exceeded.
15. In partnership with the Operations Director, prepare operational budgets for Iowa Works program service delivery and ensure that funds are expended as required by program regulations, regional protocol, and in accordance with policy; coordinate regional process for grant writing for additional funds, or other means for enhancing system resources, when necessary, to meet regional service delivery needs.
16. Approve and sign fiscal, contractual, and reporting documents; and monitor all regional contracts (i.e., on-the-job training) where program funds are expended (applied as appropriate to regions' procedures). Local grants are managed according to specific instructions and agreements with the region's fiscal agent; this includes granting of authority to specific persons to obligate or spend funds. (Integration does not change the fiscal agent's rules, regulations or requirements.)
17. Monitor and/or sign off on purchase orders and invoices utilizing state and local funds (applied as appropriate to the regions' procedures).
18. Gather ongoing feedback from Operations Director related to improvements to I\*WORKS and other IT functions and work with the OD to ensure IT is made aware of the feedback and resolution is sought.
19. The Regional Iowa WORKS Director, along with the Operations Director, will have a consistent presence at all Iowa WORKS centers under their direction. It is imperative that local leadership team members, despite functional title know and understand all integrated functions so that accurate observations, corrective actions and positive recognition can be provided to center staff.

### **Center Staffing and Services:**

20. Facilitate Leadership Team to develop understanding of the vision for the Iowa Works system and create strategic implementation plan for Iowa WORKS services within the region.
21. Assist in creating work processes for the delivery of integrated services within local areas and across the region.
22. Work collectively with other Regional Iowa WORKS Directors to ensure that strategies and services are aligned across regional boundaries.
23. Maintain regular and frequent contact with RWIB to provide updates and data on the progress of implementation of the integrated system and get necessary feedback for system and service development.

24. Attend local, regional, state or national meetings (along with other appropriate leadership and front-line staff) pertaining to IowaWORKS system, serving as the regional representative responsible for sharing information with staff.
25. Participation on Leadership Team with and foster teamwork through regular meetings to provide direction, discuss issues, collaborate on decisions, assess progress, communicate information, and get feedback on system implementation, site operations and performance.
26. Support Operations Directors in the initial implementation of and on-going improvements to the Centers' integrated services model.
27. In conjunction with the Leadership Team, ensure that all functions of the Iowa Works system are appropriately staffed and are fulfilling responsibilities.
28. Ensure that all IowaWORKS staff possess the appropriate technical and personal skills, and program knowledge to perform their functional responsibilities and meet performance outcomes of the system.
29. Review operations procedures manual (developed by Operations Directors or functional supervisors), make recommendations for improvements, and ensure adherence to established procedures.
30. In partnership with the Operations Director, evaluate the effectiveness and quality of IowaWORKS products, services and work processes.
31. Together with the Operations Director, provide direction and oversight for the identification and development of new or improved products and services offered through the IowaWORKS system.
32. Together with the Operations Director, identify and communicate priorities of the IowaWORKS system and facilitate action planning processes to address the identified priorities.
33. Functionally supervise and facilitate teamwork with Operations Director(s).
34. Together with the Operations Director(s) oversee Centers operations and functionally supervise staff at sites where additional leadership/supervisory staff is not required due to size of office.
35. Provide consultation to the Leadership Team on hiring of new staff when vacancies occur. (Hiring must be processed according to and adhere to the human resource policy and procedures relevant to the funding source and employer of record.)

**Program Responsibilities:**

36. Develop a thorough knowledge and understanding of all IowaWORKS program laws, regulations and policies to ensure proper implementation within the Iowa Works system, including but not limited to: Workforce Investment Act, Wagner-Peyser, Unemployment Insurance, RES, Veterans, Employer Services, New Iowans, PROMISE JOBS, Trade Act services, Iowa Advantage and other related employment and training programs.

37. Share changes in Iowa *WORKS* programs laws, regulations and policies with Operations Director(s), functional supervisors, and/or frontline staff (depending on office structure).
38. Identify, arrange, and/or coordinate program specific training in order develop staff knowledge and skills.
39. In partnership with Operations Director(s), conduct quarterly monitoring of contracts and files; approve training enrollment decisions based on eligibility requirements; coordinate the resolution of findings resulting from audit, monitoring, or other reviews.

## **Operations Director**

The Operations Director ensures the overall success of one or more Iowa *WORKS* Centers, with responsibility for overseeing the day-to-day operations. Operations Director functions include implementing of all state and local policies; creating and improving customer flow processes and service delivery standards; oversight and responsibility for the Center's human resources; and ensuring all outcomes are achieved. The role of the Operations Director is conducted through collaboration and teamwork with other members of the region's leadership team, including the Regional Iowa *WORKS* Director and Center Team Leaders.

As a member of the Regional Leadership Team, the Operations Director specifically represents issues that relate to procedures that affect daily operation of the Center(s) and provide recommendations on processes which best facilitate delivery of services to all customers and achieve outcomes.

All Iowa Works team members are expected to share their expertise and assist with other functions or perform additional tasks as needed.

### **Center and Team Coordination Responsibilities:**

1. The Operations Director's primary responsibility is to ensure that all integrated operations at the assigned site(s) are meeting all system, center and program goals.
2. Work in collaboration with the Regional Iowa *WORKS* Director to ensure all decisions are made in the best interest of the region and in alignment with state, local and federal policies as well as the regional customer service plan.
3. Develop a working knowledge of all Iowa *WORKS* program laws, regulations and policies to ensure proper implementation within the Iowa Works system, including but not limited to: Workforce Investment Act, Wagner-Peyser, Unemployment Insurance, RES, Veterans, Employer Services, New Iowans, PROMISE JOBS,

Trade Act services, Iowa Advantage and other related employment and training programs.

4. Follow and implement all directives, policies, and procedures of the Iowa *WORKS* system as communicated through the Regional Iowa *WORKS* Director.
5. Participate as Leadership Team member with the Regional Iowa *WORKS* Director in development of interagency agreements such as MOU and Resource Sharing agreements; reviewing and updating as necessary.
6. Provide input and support to the Regional Iowa *WORKS* Director as they aide the RWIB with development of the regional customer service plan.
7. Assist in creating Iowa *WORKS* Center standard operating procedures that facilitate customer-focused work processes within each functional area, between functions and across.
8. Communicate all new (or changed) policies, procedures, and/or processes with relevant staff to ensure they have the most up-to-date and current information affecting their work.
9. Ensure all functions are staffed appropriately and workload is organized to facilitate implementation of Iowa *WORKS* system goals.
10. Reassign staff and/or reallocate staff time assigned to functions to best meet the needs of customers, either on a temporary or permanent basis. (Permanent staff reassignment must be processed according to and adhere to the human resource policy and procedures relevant to the reassigned staff member.)
11. Guide staff to understand their roles/responsibilities within a function and in relationship to other functions to achieve the goals.
12. Plan, direct and assign Iowa *WORKS* Center activities across all functions.
13. Coordinate work processes across functions ensuring that staff are accurately and appropriately documenting work activities in I\**WORKS*, that information is being shared across functions to provide seamless service delivery, and that duplicative work activities are eliminated.
14. Identify needed staff development activities and provide and/or secure training.
15. Facilitate regularly scheduled Iowa *WORKS* Center staff meetings and call special meetings when necessary to foster teamwork, discuss Center operations, budgetary issues, technical problems and the status of projects, etc.
16. In conjunction with the Regional Iowa *WORKS* Director, prepare operational budgets for Iowa *WORKS* program service delivery; ensure that funds are expended as required by regulations, protocol and policies; participate in grant writing for additional funds or other means for enhancing resources.
17. As agreed to with Regional Iowa *WORKS* Director prepare fiscal, contractual and reporting documents, and monitor contract implementation. Also, as agreed to with the Regional Iowa *WORKS* Director, monitor, and/or approve; and/or sign off on purchase orders or invoices utilizing state and local funds (applied as

appropriate to the region's procedures.) Local grants are managed according to specific instructions and agreements with the region's fiscal agent; this includes granting of authority to specific persons to obligate or spend funds. (Integration does not change the fiscal agent's rules, regulations or requirements.)

18. In conjunction with the Regional IowaWORKS Director, create continuous improvement plans to ensure that all products and services are being designed and delivered to the highest quality standards.
19. Continually develop the depth and breadth of product line and adjust as necessary in response to customer feedback.
20. Coordinate master IowaWORKS Center schedule to ensure that all functions are appropriately staffed at all times, that all work activities are being completed by the appropriate staff, and that workloads are appropriately distributed among staff.
21. Coordinate delivery and sequencing of all services within the IowaWORKS Center including job seeker activity, training services, employer services, etc., ensuring that customers stay attached to Center services and the services are delivered within legislative, state, regional, and budgetary requirements.
22. In coordination with the Regional IowaWORKS Director participate in ongoing comprehensive public relations activities across all communities in the Region so there is public awareness and optimum utilization of the IowaWORKS system, centers and services.
23. Based on Leadership Team discussion and agreement, attend relevant state, regional or national meetings, serving as the regional representative and sharing information with staff.
24. The Operations Director, along with the Regional IowaWORKS Director, will have a consistent presence at all IowaWORKS centers under their direction. It is imperative that local leadership team members, despite functional title know and understand all integrated functions so that accurate observations, corrective actions and positive recognition can be provided to center staff.
25. The Operations Director will participate in the day-to-day activities within the Center(s). They will not only know and understand the integrated functions, but they will be able to demonstrate knowledge by consistently working within and across functions. Consistent engagement and activity is paramount, as it is the Operations Director's role to be engaged in the oversight as well as the actual functions in their respective center(s).

### **Functional Supervision Responsibilities:**

26. Identify, assign, and follow-up on work activities of staff under direct functional supervision to ensure all IowaWORKS functions are performed and that individuals are fulfilling their work responsibilities.
27. Create weekly schedules to ensure appropriate coverage of work activities and that all staff has time for breaks, lunches, etc.

28. Ensure that all staff understand what is expected of them, their roles, and their work's relationship to other functions.
29. Oversee daily work activities of those functionally supervised and ensure that staff are fulfilling all required work activities.
30. Coordinate individual work schedules and leave requests to ensure proper coverage of all functions within the Center(s) in accordance with IowaWORKS Center operational procedures. (Work schedules and leave requests must be processed according to and adhere to the human resource policy and procedures relevant to each staff member.)
31. Approve leave for those whom you directly supervise, in accordance with the relevant human resource policies.
32. Ensure all staff are knowledgeable about all IowaWORKS Center products and services and teams' roles in delivery of these products and services.
33. Serve as a resource and content expert, providing staff with guidance and being available to answer questions to clarify the work activities.
34. Create opportunities for staff to provide input on procedures/processes and share their expertise with others.
35. Document individual performance including individual successes, positive and negative behavioral issues, and contributions to the overall IowaWORKS Center operational success as a means to provide input to the staff member's performance evaluation. (Performance evaluation must be processed according to and adhere to the human resource policy and procedures relevant to each staff member.)
36. Participate in the performance evaluation processes (adhering to the human resource policy and procedures relevant to each staff member).
37. Ensure that each person feels that his/her work is valued, appreciated, and meaningful to the success of the IowaWORKS Center.
38. Actively participate as a "team member" with on-going regular workload and activities of the various functions, and temporarily taking on additional activities when workload is at capacity or special projects arise.

#### **Data Collection and Analysis Responsibilities:**

39. Serve as a resource and content expert on I\*WORKS data entry, management and processing, and collect ongoing feedback from staff and customers on improvements to I\*WORKS and forward to Regional IowaWORKS Director for presentation to IT staff.
40. Analyze operational and customer data to ensure teams are providing assigned services and meeting the expectations.
41. Collect qualitative and quantitative data (routinely and upon specific request) that accurately depicts current local operations.

42. Submit reports to, and along with, the Regional IowaWORKS Director (routinely and upon specific request.)

#### **Facilities Maintenance Responsibilities:**

43. Oversee upkeep and maintenance of building including roof, electrical, heating and cooling system, plumbing, etc.
44. Oversee physical plant maintenance such as phone system, building security and key control, painting, carpet, etc.
45. Oversee building upkeep including janitorial services, pest control, grounds keeping, snow removal, etc.
46. When required and in conjunction with Regional IowaWORKS Director and state Premises Department, coordinate and participate in securing/renewing lease agreements; building remodeling; interior and exterior signage; relocation of equipment, work stations, janitorial, pest control, grounds keeping, snow removal, etc.; and if necessary relocation of Center operations to new facility.

### **Team Leader**

Under the direction of the Operations Director, the Team Leader is responsible for assisting in the day-to-day operations of integrated service delivery within the IowaWORKS Center. The Team Leader's role is two-fold: (1) to directly supervise the work activities of a specific team or teams, and (2) to participate as a member of the team, sharing in the workload of the team.

The Team Leader is a member of the Regional Leadership Team. Specifically the Team Leader will represent issues that relate to procedures that affect daily operation of their team and provide recommendations on processes which best facilitate delivery of services to all customers. (Note: Not all teams will require a Team Leader, and may instead operate with a Team Coordinator, or may operate directly under the Operations Director. These functional designations depend on Leadership Team decisions and indicators that are unique to each site and the staff in those sites.)

All IowaWORKS team members are expected to share their expertise and assist with other functions or perform additional tasks as needed.

#### **Center Responsibilities:**

1. Follow and implement all directives, policies, and procedures of the IowaWORKS system as communicated through the Operations Director/Regional IowaWORKS Director.
2. Assist in creating IowaWORKS Center standard operating procedures that facilitate customer-focused work processes within a team/function and across teams/functions as directed by the center's Operations Director.

3. Following Iowa *WORKS* communications protocol, relate all new (or changed) policies, procedures, and/or processes to team members to ensure that they have the most up-to-date and current information that effects their jobs.
4. Submit data to the Operations Director/Regional Iowa *WORKS* Director (routinely and upon specific request) to provide information that will assist them in compiling reports.
5. Collect qualitative and quantitative data (routinely and upon specific request) that accurately depicts current work activities and outcomes of your team.
6. Serve as a resource and content expert on I\**WORKS* data entry, management and processing for team, and collect customer and staff feedback on improvements that will benefit customers, forwarding these to the Operations Director.

### **Functional Supervision Responsibilities:**

7. Actively participate as a team member by taking on as part of your on-going and regular workload, activities of the team and temporarily take on additional team activities when team workload is at capacity or special projects arise.
8. Identify, assign, and follow-up on work activities of team members under your functional supervision and in accordance with Center's integrated staffing structure.
9. Create weekly team schedules to ensure appropriate coverage of work activities and that all team members have time for breaks, lunches, etc.
10. Ensure that all team members understand what is expected of them, their roles on the team, and their team's work in relationship to other teams work.
11. Oversee daily work activities of those whom you functional supervise and ensure that team members are fulfilling all required work activities.
12. Coordinate individual team members work schedules and leave requests to ensure proper coverage within a team in accordance with Iowa *WORKS* Center operational procedures. (Work schedules and leave requests must be processed according to and adhere to the human resource policy and procedures relevant to each staff member.)
13. Ensure team members are knowledge about all Iowa *WORKS* Center products and services and teams' roles in delivery of these products and services.
14. Serve as a resource and content expert to team members, providing them with guidance and being available to answer questions to clarify the work activities.
15. Create opportunities for team members to provide input on procedures/processes and share their expertise with other team members.
16. Ensure that each team member feels that his/her work is valued, appreciated, and meaningful to the success of the Iowa *WORKS* Center.

17. Document individual team member's on-going performance including individual successes, positive and negative behavioral issues, and contributions to the overall Iowa *WORKS* Center operational success as a means to provide input to the team member's performance evaluation. (Performance evaluation must be processed according to and adhere to the human resource policy and procedures relevant to each staff member.)
18. Participate in the performance evaluation process of team members in conjunction with the Operations Director.

### **Team Coordinator**

Under the direction of the Operations Director, the Team Coordinator is a working member of a functional team that performs selected duties that will assist in ensuring team-based and effective daily operations of that function. The Team Coordinator duties do not extend to functional supervisor of the team. (Note: Not all teams will require a Team Coordinator, and may instead operate with a Team Leader, or may operate directly under the Operations Director. These functional designations depend on Leadership Team decisions and indicators that are unique to each site and the staff in those sites.)

All Iowa *WORKS* team members are expected to share their expertise and assist with other functions or perform additional tasks as needed.

### **Coordinator Responsibilities:**

1. Follow and implement all directives, policies, and procedures of the Iowa Works system as communicated through the Operations Director/Regional Iowa *WORKS* Director.
2. As directed by the Operations Director collect and submit team data (routinely and upon specific request) to provide information that will assist in compiling reports.
3. If assigned by the Operations Director, serve as a subject matter resource to team members.
4. Facilitate team operations: discussions, sharing of information and knowledge, identification of teamwork issues, development of problem-solving recommendations, and recommendations for standardizing team operations.
5. Actively participate as full, working member of assigned team, performing all other functional duties of the team.

## Membership

### Description of Functional Responsibilities:

The Membership function is the entry point into Iowa *WORKS* Center services for all customers. Responsibilities include directing customers to events/appointments/partners, processing membership applications, marketing services to members via face-to-face or telephone, conducting an initial assessment of member needs, recommending appropriate service sets to members, and ensuring that members maintain an “active” status. The Membership functions are coordinated with the Skills Development and Recruitment and Placement functions in order to manage member services throughout the service delivery process.

Note: For those centers that utilize staff as full-time telephone operators, these staff will also be on the Membership Team, with shared knowledge of the Membership functions to provide back-up support, and other members of the Membership team will share the function of telephone operator as back-up support as assigned.

All Iowa *WORKS* staff are expected to share their expertise and assist with other functions or perform additional tasks as needed.

### Primary Functional Tasks:

1. Personally greet customers immediately upon entry into the Iowa *WORKS* Center utilizing greeting standards and scripts.
2. If purpose for customer visit is for partner agency, special event or appointment, direct customer appropriately.
3. Assist customers with completion of relevant membership and other application processes (i.e., filing a claim for unemployment insurance claim if relevant); to enroll them into Iowa *WORKS* services. Provide “benefits of membership” when necessary to encourage customers to become members.
4. Provide problem resolution and technical unemployment insurance information to customers as required via telephone or in person (IWD Workforce Advisors only); encourage membership and connect claimants to the Center’s employment and training services.
5. Conduct initial verbal “service triage” to determine entry services and recommend Employment Express, Career Advancement, or Career Development services as appropriate to the member’s needs.
6. Prepare, hand out and explain membership kits, menus, tip sheets, partner referral information, workshop schedules and other related information for members in Employment Express, Career Development and Career Advancement.
7. Enter relevant data (not entered by customer) in I-WORKS.

8. Establish with members, that there are teams/staff of professionals (Membership, Skills Development and Recruitment and Placement) assisting them throughout service delivery, along with other partner services available at the Center.
9. Respond to customer inquiries by promoting available services as solutions to their employment and training needs, providing accurate information, and giving the members options on how and when to access services.
10. Personally introduce new members to a Skills Development Team member/staff and share information collected through the membership application process for new members; or share information about the purpose for the visit for returning members.
11. Design outreach and promotional strategies to attract new customers to increase the general jobseeker applicant pool and/or to increase the applicant pool for a specific sector, industry or occupation.
12. Collect and analyze customer feedback during first and subsequent visits and make continuous improvement recommendations to the Leadership Team.
13. Maintain regular and frequent contact with members (via phone, mail, email, face-to-face) to assess service needs, recommend additional services in order to assist members build the needed skills, and/or to keep the customer attached to services until employed.
14. Monitor ongoing member services throughout participation with Iowa *WORKS* based on level of service and implement activities to ensure customers stay active with Center services.
15. As appropriate to job classification; any “clerical” staff assigned to the Membership function may provide temporary back-up support to the Skills Development or Recruitment and Placement teams for the following activities:
  - Assist jobseeker to outline their work history and enter relevant data into I-WORKS.
  - Help members access services on computers and provide general “how to” information for: inventories and assessments; resume(s), searching for job listings; and applying for jobs.
  - Provide descriptions for all services listed on each service cohort menu to help members determine which services they are interested in; and explain how the member accesses those services (i.e., schedule to attend workshops).
  - Direct members to workshops/services and other information (such as tip sheets, books, videos, career guidance) to help them build specific skills when facilitated assistance is not helping them reach the desired outcome (resume, interviewing, job search strategies, etc.).
  - Schedule, administer and score performance and other tests.

- Communicate with customers to provide information about and to make referrals to other organizations in the community.
- Provide labor market information to jobseeker including jobs in demand, wage rates, education requirements, etc. so that they can make informed and realistic choices for where to begin their job search.
- Enter data into I-WORKS that documents services received by members.
- Writes job orders from employers as a primary contact in order to record an accurate description of required job duties, wages, working hours, and other pertinent referral information by phone or in person; selects appropriate occupational and industrial codes from classification manuals to ensure proper job order classification and verifies results of job referrals by contacting employers by mail and phone.

Membership team staff may be used for back-up support for these activities only after receiving appropriate and sufficient training.

16. Fully support all policies and goals as they pertain to IowaWORKS system.

## Skills Development

### Description of Functional Responsibilities:

The Skills Development function focuses on coaching jobseekers on all aspects of the job search and assisting members build their personal and job skills throughout the time that a jobseeker is a member of IowaWORKS. Skills Development is responsible for assisting new members begin their service strategy based on recommendations from Membership and provides ongoing assistance to returning members based on need. This function requires management of a variety of services, and multiple job seekers simultaneously through facilitated self-help, brief (and perhaps frequent) one-on-one conversations, small group interaction and structured workshops.

Once a jobseeker has defined his/her career/job choices, possesses the appropriate skills for the chosen jobs, and has developed necessary job search tools, he/she is linked with Recruitment & Placement function for referral to specific job vacancies and/or to get additional information on the local labor market that is not readily available or known.

All IowaWORKS staff are expected to share their expertise and assist with other functions or perform additional tasks as the need.

### **Primary Functional Tasks:**

1. Personally introduce yourself and services available within the Iowa *WORKS* Centers to the members explaining how the services will assist them in their job search or help build personal or work skills to reach their goals.
2. Continue dialogue with jobseeker to collect additional information to ensure recommended services (employment express, career development, career advancement) are appropriate.
3. Assist jobseeker to outline their work history and list their current package of skills, and enter relevant data into I\*WORKS.
4. Conduct appropriate assessment activities to identify current skill levels, determine needed skills-building services, and create a plan to build skills, and/or match skills to current job openings.
5. Deliver appropriate skill-development services to each customer including facilitation of self-help services, presentation of workshops including Iowa Advantage series, and advising and consultation to ensure that each customer reaches his/her goals.
6. Maintain required data entry of service delivery and customer information, service notes, and other required I\*WORKS transactions.

### ***When appropriate to the individual's desires and needs:***

7. Assist jobseekers to create resume(s) to assist them in applying for jobs, matching their skills to job vacancy requirements, and to highlight skills for employers to match to vacancies in their company.
8. Assist jobseeker create a job search plan which utilizes a variety of strategies for identifying job leads and applying for job openings (online, newspaper, specific jobs for referral to I\*WORKS job orders, etc.)
9. Recommend needed job search tools appropriate for the jobseeker's targeted jobs and assist him/her in building a personal job search toolkit (resume, interviewing, applications, childcare planning, transportation options, etc.).
10. Direct jobseeker to workshops/services to assist them build specific skills when facilitated assistance is not helping them reach the desired outcome (resume, interviewing, job search strategies, etc.).
11. Assist jobseekers with identifying their personal job skills, the skills need for specific jobs of interest, and identify skills gaps between current transferable skills and skills needed for a particular job.
12. Review jobseeker's skills compared to those required for a specific job vacancy to determine appropriateness for referral to the job vacancy.
13. Assist jobseekers with identifying their personal interests and explore skills/job options that match those interests (i.e., interest inventory).

14. Provide labor market information to jobseeker including jobs in demand, wage rates, education requirements, etc. so that they can make informed and realistic choices for where to begin their job search.
15. Explore training and skill-building opportunities in desired field, assist in creating training plan to build skills, and if warranted, recommend jobseeker for Iowa Works training programs/funds.
16. Conduct a budget analysis to determine salary needs, then direct jobseeker to jobs that provide that salary.
17. Assist job seeker in creating a list of employers to conduct a targeted job search.
18. Consult with jobseeker on career options and recommend careers/jobs that the jobseeker may not have considered.
19. Maintain regular and frequent contact with members (via phone, mail, email, face-to-face) to recommend additional services in order to assist members to build the needed skills, access outcomes of activities, and/or to keep the customer attached to services on an on-going basis.
20. Manage classroom-based training accounts (ITAs) for those who receive these funds.
21. Fully support all policies and goals as they pertain to the Iowa *WORKS* system.

## **Recruitment & Placement**

### **Description of Functional Responsibilities:**

The Recruitment & Placement function is the bridge between hiring employers and qualified job seekers. The primary role for the Recruitment & Placement function is to help job-ready job candidates find suitable employment and includes maintaining up-to-date knowledge of labor market information, recruitment and hiring practices, and employer needs. This function coordinates with staff assigned to the Skills Development function to review and refer jobseekers who meet the specified qualifications of employer job vacancies.

All Iowa *WORKS* staff are expected to share their expertise and assist with other functions or perform additional tasks as needed.

### **Primary Functional Tasks:**

1. Provide information and guidance to employers on how to enter job vacancies and use other information and resources in I\*WORKS, or enter job vacancies into system for employer when appropriate.
2. Conduct quality review of new job vacancies as directed by local procedures, ensuring all posted vacancies meet standards.
3. Ensure Veteran's preference standards are met regarding job vacancy processing.

4. Provide automated job matching on assigned job vacancies; for qualified job vacancies, when no matches are found, conduct additional recruitment activities (i.e., at schools, advertising for specific skill sets, Center promotions, etc.) and refer qualified applicants.
5. Prior to making any staff referral, ensure applicant meets employer qualifications, is an appropriate referral for the specific job opening, and based on employer-specific knowledge, prepare the job seeker for employer hiring process (i.e., general tips on appearance, presentation skills, following up on the interview, etc).
6. Provide follow-up contact and services to referred job seekers and employers during the hiring process as needed. Follow-up with employers to assess quality of staff-referred applicants and referral processes, establish next steps to fill the vacancy, and determine (and ensure) customer satisfaction.
7. Enter required activity and outcome data in I\*WORKS.
8. Provide assistance to job seekers (highly skilled, but not necessarily high demand jobs in area) to expand job search strategy and/or recommend they contact specific employers who may or may not be currently hiring. Contact employers to promote a jobseeker that may be of particular interest to them, even when a current job opening does not exist.
9. Participate in development and implementation of customized recruitment strategies (i.e., on-site interviewing, application collections, job fairs, etc.) to assist businesses in filling their hiring needs.
10. Identify sources for potential new employer customers (i.e.: new employer list from chambers, newly registered employers in I\*WORKS who have not yet listed job orders, and weekly classified advertising); b) contact employers to provide an overview of hiring services available; and, c) solicit job vacancies for any current open jobs.
11. As directed, assist in the development of draft informational and promotional materials and tools, to be submitted to Communications Department for approval; distribute and use materials appropriately.
12. As directed by local leadership team, participate in employer meetings, seminars, conferences or associations.
13. Collect and catalog other business resources and service information in order to make appropriate referrals; provide relevant referrals to other services as requested by employers.
14. Fully support all policies and goals of the Iowa *WORKS* system.

*With (future) adaptation of target industry sector strategies and business account management model, additional Recruitment & Placement functions include:*

15. Participate in implementation of employer sector strategies.
16. Collect and analyze information about employers' recruitment and hiring practices for distribution to job seekers.
17. Be knowledgeable about the business account management model and how the different protocols and requirements differ by account level; implement as directed.
18. Organize employer accounts and job vacancies using an industry based strategy in order to develop industry expertise.

