

Strategies in Addressing Program Alignment in Customer Service

The Community Resource Academy and
Integrated Resource Team Strategy



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Meet Your Facilitators



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Objectives

- ✓ Understand the Integrated Resource Team (IRT) strategy and how it can be applied
- ✓ Understand how the IRT Strategy fits into the Illinois Workforce System priorities
- ✓ Recognize benefits of the IRT strategy for customer service
- ✓ Identify resources that will support collaborative teams in using the IRT strategy through the Community Academy
- ✓ Learn how to structure and conduct IRT meetings

Connecting the IRT to:

1: Illinois Workforce
System Priorities

2: WIOA

Related Priorities Identified by Illinois LWIBs and Local Offices/Programs

- (#4) Communication Occurs across One-Stop Programs (20 Areas)
- (#3) Cross-Training is Provided to Staff (14)
- (#1) Use Customer Input to Design and Deliver services (9)
- (#9) Processes are Streamlined and Aligned (7)
- (#13) Customer Information is Shared (7)
- (#12) Partners Share an Understanding of Career Pathways (5)
- (#8) Services are Delivered by Function (4)

WIOA and the IRT

WIOA ...

- Calls for streamlining of core programs, including the development of a Combined or Unified State Plan and cross-system/program common measures; and
- Calls for focusing services on targeted populations that have barriers to employment and for providing more wraparound services.

The IRT ...

- Streamlines services through a cross-agency team approach; and
- Offers a tangible model for providing wraparound services based on the individual need of the job seeker to help the job seeker meet their employment goal (WIOA Common Performance).

WIOA and the IRT (continued)

The IRT has many qualities that may make it an important and effective strategy for emerging WIOA service delivery models as it is a method of coordinating resources that is...

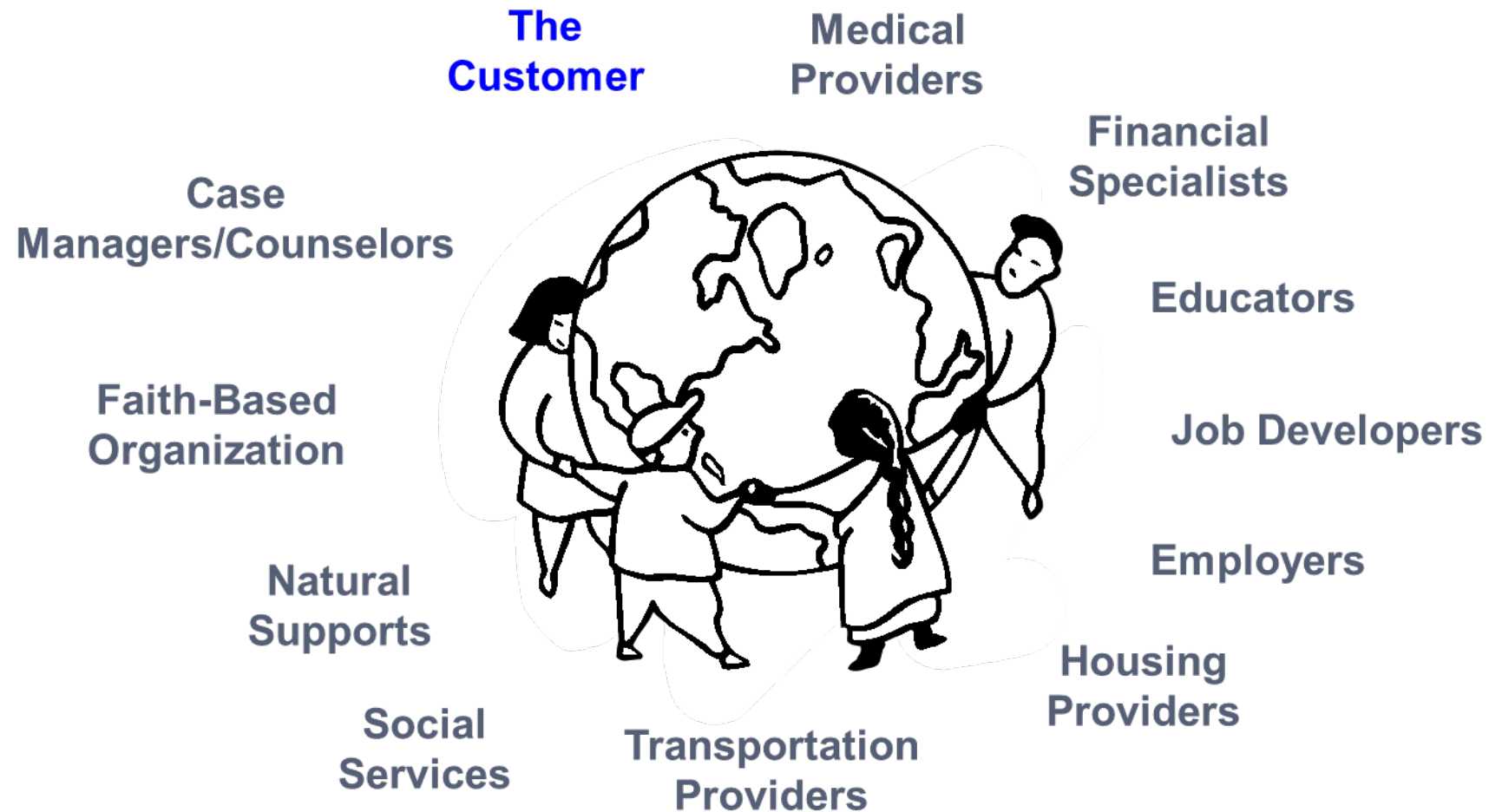
- ✓ Consumer focused
- ✓ Outcome driven
- ✓ Informal
- ✓ Applicable through multiple outcomes

Conceptualizing the IRT

The Silo Effect



The IRT Connection



Historical Background

- Born from the Disability Program Navigator (DPN) Initiative and its successor, the Disability Employment Initiative (DEI)
- Developed in response to the challenge of providing services across multiple systems based on the needs of an individual consumer
- Identified that customers often did not access all needed resources or received duplicative
- Recognized the need to address resource gaps based on an individual's needs
- Proved that through the IRT individual and systems level change could occur

Defining the IRT

What is an IRT?

- Initiated on behalf of a customer to address that individual's specific needs
- Brings together a team of diverse service providers to strategize how services can be coordinated to reach and maintain an employment goal
- Is an informal agreement between a customer and the systems providing services
- The customer and the team of service providers come together to establish three main components:
 - ✓ Customer-identified, mutually agreed upon, employment goal
 - ✓ Lines of Communication
 - ✓ Sequence of Services.

Goals of the IRT

- Enhance cross-agency, cross-system collaboration and communication
- Collaboration makes everyone's job easier
- Promotes relationship building
- Allows the members to coordinate resources
- Customer driven approach - members of the team are based on the customer's unique needs
- Promotes shared accountability
- Share resources to address the needs of more people
- Shared outcomes across systems

What an IRT IS and What it IS NOT ...

- An IRT is an approach used for an **INDIVIDUAL** customer.
 - An IRT is **NOT** an interagency committee consisting of various disability/community agencies that focus on systems collaboration.
- The main purpose of an IRT is **EMPLOYMENT**.
 - The main purpose of an IRT is **NOT** resource mapping or to assist an individual to learn about various agency resources.

Who Participates in an IRT?

An IRT may consist of members from a wide variety of community programs and service providers, including the following:

- The Workforce system
- Behavioral Health
- Vocational Rehabilitation
- Community Work Incentives Coordinator
- Employment Specialists
- Housing Provider
- School or Post Secondary Education
- Employer
- Correctional system - probation
- TANF
- Faith Based organizations
- Social Services
- Transportation services
- Apprenticeship sponsors
- Veterans Services
- Advocates/Friends of Job Seeker
- Others?

*Developing Partnerships
through the Community
Academy*

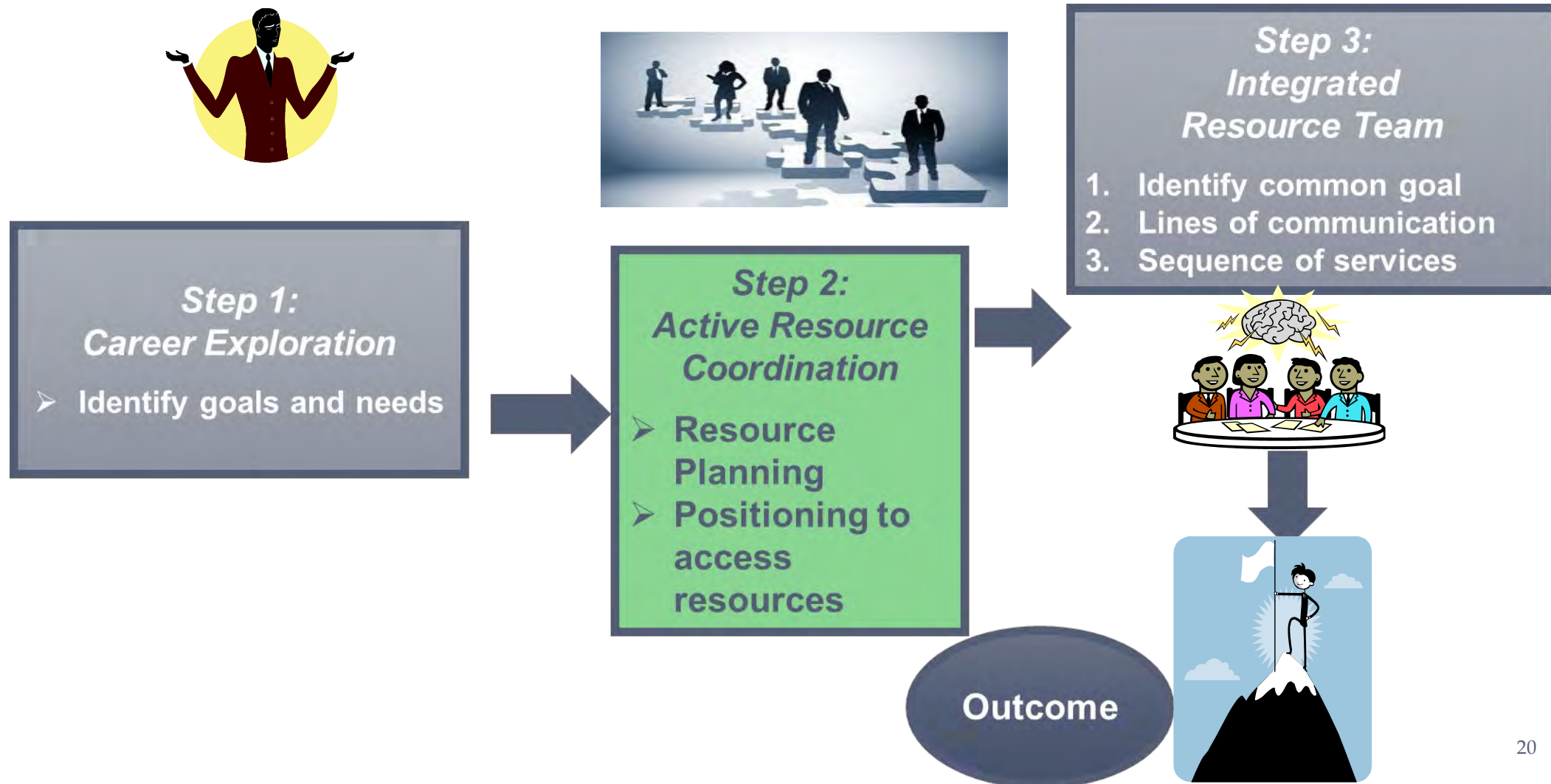
The Community Academy – Strategy to Get to Know Your Partners

- Brings together a wide range of community partners – traditional and non-traditional
- Promotes knowledge translation of all programs and resources
- Allows for “same page” understanding of the IRT and enhances “by-in”
- Produces “out of the box” thinking
- Builds relationships
- Develops cross agency team collaboration
- Allows for brain storming of real customer issues
- Enhances effectiveness of future work
- Enables understanding of one another's possibilities and limitations

Coordinating an IRT



IRT Flow of Services



Step 1: Career Exploration and Need

As was noted in the previous section, the purpose of an IRT is to help the consumer attain their specific employment goal

Career Exploration serves as the first step in developing an IRT. The career exploration should result in a *proposed* employment goal that is:

- ✓ Self-determined
- ✓ Strength-based
- ✓ Concrete enough to build a plan around
- ✓ Meets the required outcomes of the systems accessed.

Step 1: Career Exploration and Need (continued)

Once the employment goal has been identified, consider the following:

➤ **Employment Goal**

- Are there resources **and/or expertise** beyond what is available from your own system that are critical to your customer's success in attaining the **proposed** employment goal?

➤ **The Customer**

- What other systems is your customer currently accessing?
- Are there other systems that can help them attain and retain the **proposed** employment goal?

Step 2: Active Resource Coordination

Active Resource Coordination (ARC) is the process of identifying needed resources and appropriate and prioritized action steps to address specific, targeted barriers to employment experienced by an individual customer.

ARC is likely something you are already doing during the process of intake and plan development. Compared with the current service delivery model, this may just be an enhanced and more intentional step under the IRT approach.

- *ARC is more than just a referral to multiple service providers.*
- *ARC is the process of helping the customer create a goal-specific (hint: employment goal) resource plan.*

Step 2: ARC (continued)

ARC is directly assisting a customer to convene and negotiate with multiple service providers to create an employment plan that accesses needed resources from multiple systems. Considerations when determining if your agency does active resource coordination include the following:

- Are referrals given before or after the development of an employment goal?
- Is communication between service providers solely the responsibility of the customer?

Active Resource Coordination always takes place **PRIOR** to an Integrated Resource Team (IRT) being put in place, although active resource coordination may take place without resulting in an IRT.

So you can have ARC without an IRT, but you CANNOT have an IRT without first having done some Active Resource Coordination!

Step 2: ARC vs. Simple Referral

- Active Resource Coordination is more than simple referral. As noted on the previous slide, it includes helping the customer to engage and approach partners around the potential for partnering with your agency.
- Many agencies will provide information and referral, but the customer may not understand the relevance of a referral or the steps that need to be taken. Active resource coordination helps the customer to identify, engage and coordinate resources around their needs relevant to achieving their employment goal.

Step 3: Building the IRT

THREE ELEMENTS OF EVERY IRT MEETING

The Individual

- Multiple needs/barriers
- Lack of coordination
- “Stuck”

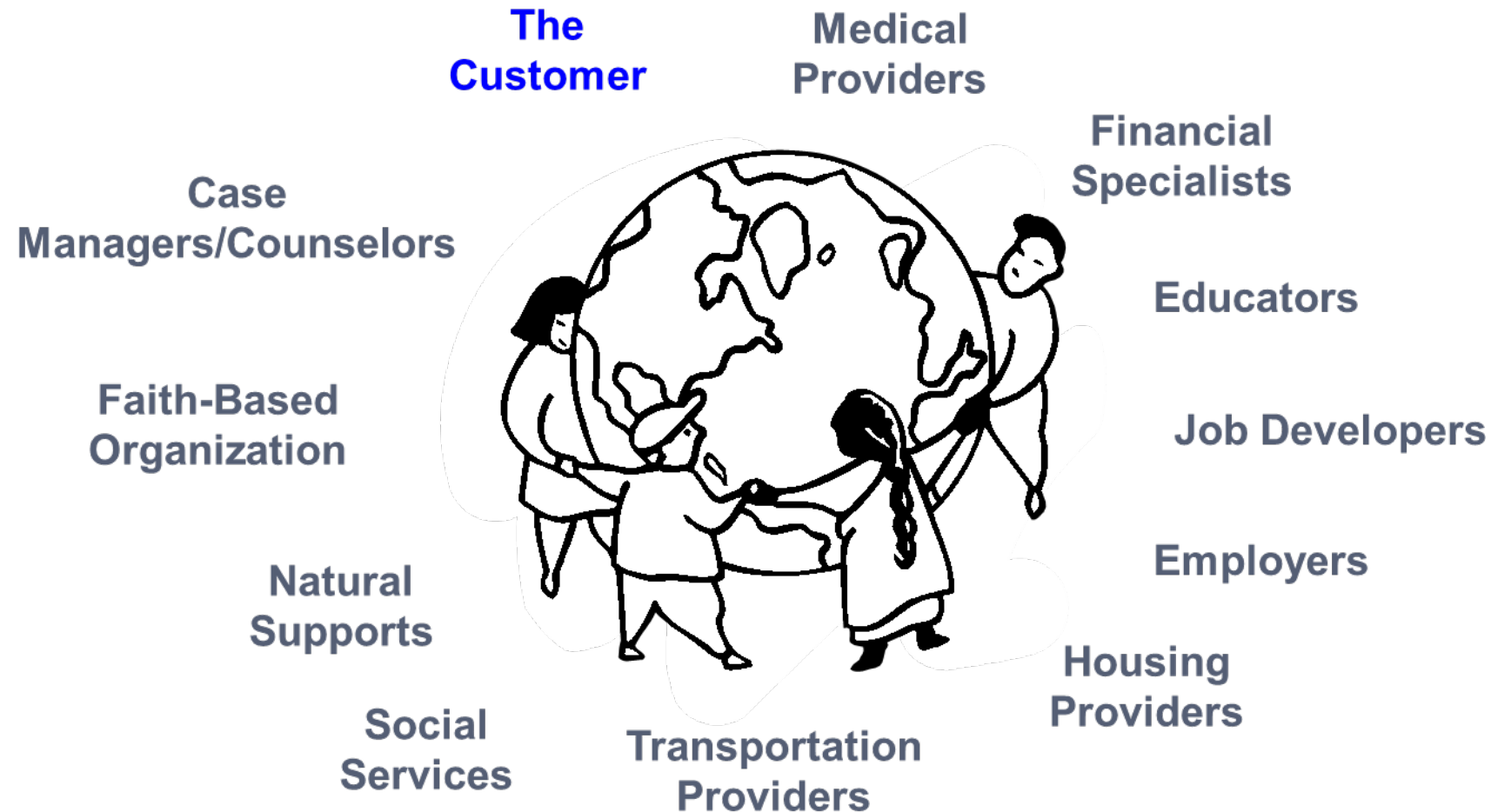
The Team

- Led by the job seeker
- Professional support is only a facilitator
- Expertise and partnering is the key

The Plan

- Not about the solution; about the puzzle
- Evolves
- Not tied to funding

Building the Team



Step 3: Who Should Be at the Table?

The Employment Goal

- What resources beyond those available in your system are critical to your customer's success in attaining their employment goal?

The Customer

- What system is your customer currently accessing?
- What services might your customer be eligible for that are relevant in the context of attaining their stated employment goal?

Step 3: Approaching Partners

Before approaching partners, the customer should be engaged by your system and positioned to access your system's resources.

For example ...

- ✓ Customer should be eligible or presumed eligible for your system's services.
- ✓ Customer should have determined an employment goal that allows for the application of your system's resources.
- ✓ Customer should be consulted and agree to all contacts, and have a clear understanding of the IRT approach and its benefits.

Step 3: Building the IRT - Partnerships

- **Connect to partners based on individuals needs and service gaps**
 - Connect to services your customer is already involved in
 - Determine what other services they need to connect to and invite
- **If the customer needs to apply for services prior to attendance at the IRT, assist with the process**
 - Ask questions concerning the specific services that are being delivered.
 - Emphasize the benefits of partnering with your program .
 - Try to uncover areas where you or the partner have some flexibility within the established plans.

Step 3: Building the IRT -- Convening the meeting

- Once the customer is determined eligible by another service provider, and these service providers are agreeable to partnering, discuss with your customer their role as the driving member of the Integrated Resource Team.
- After establishing the customer's role, a face-to-face meeting should be convened -- whenever possible -- with the partners and the customer. If a face-to-face meeting is not possible, virtual meetings are adequate.
- The purpose of the meeting is to reach consensus around the following three key parameters:
 1. **A common employment goal**
 2. **Lines of Communication**
 3. **A Sequence of Services**

*Facilitating an IRT
Meeting and Negotiating a
Multi-Partner Strategy*

Step 2: Reaching Consensus

After introductions have been made, and purpose and concerns have been discussed, the group should set out to reach consensus around the following three key elements:

- ✓ A Common Employment goal (as identified by the customer)
- ✓ Lines of Communication
- ✓ A Sequence of Services

Step 2a: Reaching Consensus on Employment Goal

A Common Employment Goal

- Most service providers will have some sort of employment goal as an outcome to services.
- Each provider will have specific parameters as to **HOW** an employment outcome is defined.
- Discuss what outcomes are linked to resources accessed.

Step 2b: Reaching Consensus on Lines of Communication

Lines of Communication

- The customer agrees to communication between partners.
- Identify what information will be communicated.
- Identify how partners will be informed of progress or needs.

Who is the point of contact?

Step 2c: Reaching Consensus on Sequence of Services

Sequence of Services

- Determine which services are necessary at each point in a plan.
- Link services to milestones within a plan.
- Find out when services stop for each provider.

Step 3: A Multi-Partner Strategy

- After reaching consensus around the employment goal and the lines of communication, agencies agree to provide specific supports and resources based on what is available through their programs in support of the customer obtaining their employment goal.
- Each agency completes their own specific plan/required documentation and either indicates support provided by other agencies in their Manage Information System (MIS) -- if the MIS has that functionality -- or case notes regarding partner involvement.
- Agreement around a timeline or need for further IRT Meetings should also be discussed.

A Quick Review:

- **Active Resource Coordination** is the process in which you help customers identify resources, that are beyond what your own program can provide, and help to engage those resources around a mutually agreed upon employment goal.
- Following Active Resource Coordination, an **IRT meeting** is convened with the customer and partner agencies in which (led by the customer) the customer and agencies come to consensus around three key parameters:
 - **Employment Goal**
 - **Lines of Communication**
 - **Sequence of Services**
- Customers and Partners agree to roles and services consistent with their own agencies allowances and plans are documented and moved forward.

IRT Considerations

Based on your customer's work goal and listed challenges, determine the following:

- What types of people, supports, resources does this individual need to reach their goal?
- With this information, who should participate in this individual's IRT?
- Which agencies/individuals would contribute to the success of this individual?
- Who or what natural or other supports should be at the table?
- Who will be the most productive advocate or mentor for this individual to assist with attaining their goals?

IRT Considerations (continued)

Set up your IRT for success and sustainability

- Which agency would be the best fit to provide the leadership/coordination for the IRT?
- What role will each member of the team play?
- Who is responsible for what and when?
- How and when will the team communicate with the customer? With one another?
- Do you have a plan for supporting crises or roadblocks?
- Do you have equal resource sharing (time and financial), and do you have full buy-in from everyone?
- Does the individual have responsibility and buy-in?
- Who will ensure forward momentum?
- Do you have a plan for continuation beyond program exit?

Negotiating the Plan

EBTC		WINTAC	
Attending		Title/Role	
Newt Scamander	Customer		
Minerva McGonagall	VR Counselor		
Severus Snape	Case Manager CSB		
Septima Vector	WISA		
Rubeus Hagrid	Natural Support		
Remus Lupin	WIOA Adult		
Poppy Pomfrey	Disability Student Services – Community College		
Agenda Items			
Agenda Item #1: Employment Goal Veterinary Technician /Wage Goal - \$11-\$13/Hour - 30+ Hours a Week			
Agenda Item #2: Lines of Communication Customer will approach service provider with any challenges based on what customer's need is and the service provider agrees to provide an update to larger group.			
Agenda Item #3: Sequence of Services Current Employment: Madam Malkin's Robes for All Occasions 10-20 Hrs/Week - \$7.25/Hour Enroll in Vet Tech Program Winter 2019 at Community College Fer/During Training <ul style="list-style-type: none"> WIOA Adult will pay Tuition and Fees DARS will provide Gas Voucher CSB – Med Management and Group/Individual Support Disability Student Services – Support Customer in Discussing Accommodation Needs with Professors Talk to current employer about schedule to accommodate classes Post Training <ul style="list-style-type: none"> WISA – Support in Continuation of wage reporting, Understanding SGA and EPE DARS – Job Development WIOA Adult – Interviewing Skills and Resume Development 			
Action Items			
Action	Responsible	Due Date	
Complete App for Vet Tech Program	Newt & Poppy	08/30/2018	
Talk to Current Employer abt. Schedule	Newt & Minerva	09/01/2018	
Submit Tuition and Fees for Program	Remus	09/15/2018	
Discuss Accommodations w/Profs	Newt, Poppy & Minerva	9/30/2018	
Continue to Report Current Wages	Newt & Septima	ongoing	
Self-Care: Meets and Groups	Newt, Rubeus, & Severus	ongoing	
Gas Voucher	Minerva	09/01/2018	

Parts of the Plan - Attendees

IRT Meeting 07/13/2020

Attending	Title/Role
Jeremy Walsh	Customer
Penny Martin	VR Counselor
Mark Hampton	Probation Officer
Janine Smart	Work Incentives Counselor
Harold Pulaski	Builders Association Pre-Apprenticeship Coordinator
Emily George	WIOA-Title 1 Manager
Bradley Sheehan	ABI Therapist
Nicholas Callahan	Math & Reading Tutor
Susan Walsh	Natural Support-Mother
Matthew LaPierre	Vehicles For Change Coordinator

Parts of the Plan - Agenda

Agenda Items
<p>Agenda Item #1: Employment Goal Carpentry Apprentice /Wage Goal - \$15/Hour – 30+ Hours a Week</p>
<p>Agenda Item #2: Lines of Communication Jeremy will approach Penny with any challenges based on what his needs and she has agreed to provide bi-weekly updates to the larger group.</p>
<p>Agenda Item #3: Sequence of Services <i>Enroll in 26 Week Pre-Apprenticeship Carpentry Training Program with the Builder's Association. Once Completed, Jeremy will enter into a four year paid apprenticeship program.</i></p> <ul style="list-style-type: none"> • WIOA Title 1 Will Pay for all Tools and Learning Materials. His WIOA Title One Manager will also help Jeremy with his resume and interview preparation. • VR will pay for transportation to and from Pre-Apprenticeship Classes as well as a tutor to prepare Jeremy for his Proficiency Exams. VR has also agreed to purchase Jeremy a "smart pen" to help Jeremy retain information he learns in his classes. • Vehicles for Change will assist Jeremy with the application to acquire a donated work truck by the time he is ready to enter into a paid apprenticeship. • Pre-Apprenticeship Coordinator will assist Jeremy with his pre-apprenticeship application and class schedule. He will also work with the instructors to provide Jeremy reasonable accommodations in the classroom . Once Jeremy has graduated from the Pre-Apprenticeship Program, he will assist him in acquiring an official paid apprenticeship. • ABI Therapist -Will Oversee Med Management, Group/Individual Counseling, and Independent Living Skills • Probation Officer – Adjust Jeremy's Appointment Schedule to fit with class schedule. • Work Incentives Counselor – Support Jeremy with wage reporting, and will help him set up an ABLE account so he can save for his own housing. • Natural Support will be given by his mother who agreed at today's IRT meeting to now allow Jeremy to live with her rent-free until he secures his paid apprenticeship.

Parts of the Plan – Action Items

Action Items		
Action	Responsible	Due Date
Complete Pre-Apprenticeship Application	Jeremy Walsh & Harold Pulaski	07/24/2020
Re-Adjust Probation Meeting Schedule	Mark Hampton	07/15/2020
Purchase Tools and Equipment	Emily George	08/10/2020
Develop Tutoring Session Schedule for Proficiency Exams	Jeremy Walsh & Nicholas Callahan	08/17/2020
Enroll in ABLE Account	Jeremy Walsh & Janine Smart	07/30/2020
Self-Care: Meds and Groups	Jeremy Walsh & Bradley Sheehan	ongoing
Set Up Transportation Vouchers and Purchase Smart Pen	Penny Martin	08/20/2020
Complete Vehicles For Change Application and Schedule Interview	Jeremy Walsh & Matthew LaPierre	08/13/2020
Provide Bi-Weekly Updates Via Email	Penny Martin	07/27/2020 & Ongoing
Begin Pre-Apprenticeship Classes	Jeremy Walsh	08/24/2020

Recapping the Benefits of the IRT

The Benefits of an IRT – Win-Win

(Slide 1 of 3)

- The IRT approach is individualized and promotes active involvement and accountability of all team members.
- IRT members and services are dynamic, providing flexible and timely services and supports that are adjusted in response to the changing needs, preferences or life situations of the individual as they move through the employment process.
- The IRT is a “Team Approach,” ensuring a holistic response, providing a full complement of needed services for the individual.
- The IRT leverages existing resources to improve coordination and avoid duplication of services.
- Active Resource Coordination can provide the vehicle for agencies to come together and provide stabilization services to prepare an individual to develop an employment goal prior to participating in the full IRT services.
- The “Teamwork” established within the IRT alleviates a heavy load on any one person or agency.

The Benefits of an IRT – Win-Win

(Slide 2 of 3)

- The IRT can designate a member to maintain documentation of services and progress that can be replicated through copy/paste and entered into each agency's separate MIS systems, thereby cutting down on documentation burden. Assessment documents can be shared so all agencies get the same information as needed.
- The IRT promotes accountability and follow-through for both individual and service providers.
- The IRT can provide a single point of contact for the individual with lines of communication being established as a mechanism to keep all members informed.
- The IRT can happen anywhere providing ease of access for the individual to their service team.

The Benefits of an IRT –Win-Win

(Slide 3 of 3)

- The IRT can establish complimentary services and increase practitioner’s knowledge of other service delivery options. Team members can establish a common mission that respects individual agency’s criteria for services and allows each agency to contribute their strength to create a whole of the parts.
- The IRT is empowering for the individuals as they see how many people they have supporting and encouraging them to achieve their goals.
- Lines of communication are established to include a common understanding of individual agency terms and definitions.
- The IRT provides a mechanism for sharing costs, resources and can establish common goals for the individual that can be replicated on each agency’s individualized plan.
- The IRT builds relationships between agency staff and the individuals they serve.

Revisiting the Priorities Identified by Illinois LWIBs and Local Offices/Programs

- (#4) Communication Occurs across One-Stop Programs (20 Areas)
- (#3) Cross-Training is Provided to Staff (14)
- (#1) Use Customer Input to Design and Deliver services (9)
- (#9) Processes are Streamlined and Aligned (7)
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The IRT Positive Results



Resources

Success Stories in Utilizing an Integrated Resource Team

- February 2018 (Iowa)
 - <https://www.youtube.com/watch?v=CYuWjYKgZdl>
- Integrated Resource Team Portland Oregon
 - <https://vimeo.com/260033830>
- Workforce Innovation Technical Assistance Center (WINTAC)
 - <http://www.wintac.org>
 - Archived training on IRT – Site registration required
 - <http://lms.wintac.org/course/view.php?id=68>

Questions

