



**OFA TANF/WIOA Peer Exchange
Affinity Call Webinar
Data Sharing and Integration
March 15, 2016**



Lisa Washington-Thomas: Okay, great. Good afternoon, everyone. Thank you for joining us today for our second TANF-WIOA Affinity Call. I'm Lisa Washington-Thomas, and I am the Branch Chief for the Self-Sufficiency Branch in the Office of Family Assistance. I just wanted to go over a couple of housekeeping items. Your line is muted, unless you hit star-6. We'll go through a roll call, and then we'll have a Q&A section. And once you're finished speaking, if you hit star-6 again to mute your line, so that we--everyone can hear. As we know, life happens, and fires happen. And so we don't want to hear fire engines or the neighbor's dog barking, because it affects everyone's hearing. So we know that you wouldn't do anything intentionally, but we just know that life happens. So thank you. Before we begin today, we want to see who else is on the line. So I am going to go around to my Central Office colleagues. Then we'll do Regional Offices. And then we'll ask each site to introduce yourself and for your coach or your facilitator-- your facilitator-- to introduce yourself-- introduce themselves after you have. So again, I'm Lisa. In the room with me is Carol Mizoguchi. Okay? And... I believe Damon Waters and James Butler are also on the line from Central Office. Anyone else also on the line from Central Office OFA?

Damon Waters: Damon and James are here.

Lisa Washington-Thomas: Okay, great. And from Regional Office?

Caitlin Lowell: [inaudible] also here.

Lisa Washington-Thomas: I'm sorry. I didn't get that name.

Caitlin Lowell: Caitlin Lowell, a new fellow in OFA working on SNAP and TANF coordination.

Lisa Washington-Thomas: Caitlin is a new fellow with us, and we're so proud that she's here. And she brings with her a wealth of experience and will be working with TANF and SNAP E&T coordination. So welcome, Caitlin. Anyone else from Central Office? Great. What about regional colleagues? Starting with Region II and then going down--

Eileen Freedman: Eileen Freedman, Region III.

Lisa Washington-Thomas: Hi, Eileen.

Eileen Freedman: Hi, Lisa.

Gary Allen: Gary Allen, Region VII.

Julie Fong: Julie Fong, Region IX.

Frank Shields: Frank Shields, Region X.

Jacqueline Jackson: Jacqueline Jackson, Region IV.

Lisa Washington-Thomas: And I've seen Frank Ceruto and Carol Monteiro on the--online. And Aracelis Del Ray. Well, they're there, and I'm sure they're saying "hello." And if you guys are on mute, you can cut me-- you can jump in at any time. Yes, I can hear you.

Shantel Anderson: Oh, hi. This is Shantel in Region II.

Lisa Washington-Thomas: Hi, Shantel.

Shantel Anderson: Hi.

Lisa Washington-Thomas: Okay, thank you. And then we'll go to our sites, saving the best for last. So we're going to go with Region X. Is anyone here from Oregon? Okay, is their coach there, Rebecca? Okay, remember to hit star-6. Is anyone here from Nevada?

Lori Wilson: This is Lori. I'm here from Nevada-- Lori Wilson.

Lisa Washington-Thomas: Hi, Lori.

Steve Fisher: And this is-- and this is Steve Fisher, from Nevada as well.

Lisa Washington-Thomas: Great. Welcome, Lori and Steve. Missouri--is anyone here from Missouri, or Missour-ah?

Melissa Woltkamp: Pat and Melissa with TANF, from Division of Workforce Development, Missouri.

Lisa Washington-Thomas: Welcome, Melissa. Arkansas?

Phil Harris: Yeah, Lisa, you've got Phil Harris here, from the Department of Workforce Services, Arkansas.

Lisa Washington-Thomas: Phil, I feel like I just saw you, just a couple of weeks ago

Phil Harris: Yes, ma'am.

Lisa Washington-Thomas: Mississippi? I know Mississippi's on the line, because I--

James Williams: [inaudible] state board.

Lisa Washington-Thomas: Okay.

Mimmo Parisi: This is Mimmo Parisi with NSPARC.

Jonathan Barlow: This is Jonathan Barlow at NSPARC, Mississippi.

Lisa Washington-Thomas: Thank you. Okay, is anyone here from Washington, D.C.? Okay, and is anyone here from Massachusetts?

John Stella: From Massachusetts.

Sarah Stuart: And Sarah Stuart from DTA.

Lisa Washington-Thomas: Okay, I just heard one name from each of you. So if you could go back--the person from D.C.?

Sarah Stuart: No, I'm sorry. This is John Stella and Sarah Stuart. We're both from Massachusetts.

Lisa Washington-Thomas: Oh, okay. Thank you.

Sarah Stuart: Yup.

Lisa Washington-Thomas: Welcome, everyone. And now, did I miss any ICF staff? Because I went a little quickly, and I didn't hear some of the facilitators.

Cindy Sherlock: Hi, Lisa. Cindy Sherlock is on as the coach for D.C.

Lisa Washington-Thomas: Okay.

Lynn Carrier: Hi Lisa. Lynn Carrier.

Lisa Washington-Thomas: And Jackie, I know you're on.

Jackie Rhodes: Yup, I'm here. This is Jackie Rhodes with ICF.

Lisa Washington-Thomas: Okay. Well, thank you, everyone. If we missed anyone... Nicole, but she said Nicole Bossard, Mississippi's facilitator.

Nicole Bossard: That's correct.

Lisa Washington-Thomas: Okay. I was telling our representatives from Mississippi, Jonathan and Mimmo and James, that I was-- a couple of weeks-- a couple of months ago, I was in a meeting. I can't remember the meeting, but one of the attendees said, "And as you know, Mississippi is nationally recognized for their data integration." And I was surprised, because we had just met in September, and although you shared a lot of good information, I don't think you shared that particular information. So I just was so glad that we could get this call together, so that you could share with more people about your experiences with data integration especially, since that is the one question that most people have and are tackling and have been tackling for years. So I'm just looking forward to hearing your presentation. So we have--we will-- we'll feature discussion with James Williams, the executive director of the State Workforce Development Board from Mississippi team, and his colleagues, Dr. Mimmo Parisi and Dr. Jonathan Barlow from the National Strategic Planning and Analysis Research Center at Mississippi State University. James, Dr. Parisi, and Dr. Barlow will discuss Mississippi's efforts around data sharing and integration between TANF, WIOA, and other partner systems. They will share information on what it takes to build a collaborative commitment and strategy for meeting different programmatic needs. The presenters will also share information on their common intake form and electronic referral system. But before we

begin this conversation with Mississippi, we're excited to share with you our new TANF-WIOA resource hub, which is now live on our OFA PeerTA website. And I'm going to turn this over to Jackie for her to give a further explanation and show you the resource hub.

Jackie Rhodes: Thanks, Lisa. So while the hub is loading up, I just wanted to provide a little bit more information on the hub. As you know, we've talked about it a little bit in our previous call. And I think we might have even mentioned it back in September. And it's finally here for your use. It's sitting live on the OFA PeerTA website, which hopefully, a lot of you are already familiar with. But we've basically put together a hub to help you and other states and local areas across the country with their TANF and WIOA collaboration efforts. You can see that it includes a place where you can ask questions. So anything related to the topic of workforce development or WIOA may go here, and people can actually submit a response. And you can click here to ask. You can also add your own resources. And I'm sure you've gotten several emails from me and your facilitators asking if you can submit any resources to share. And if you do, you'll-- your sites are actually highlighted here on the hub. So if you were to click on one of your states, anything that you would submit to us would be housed here. And that could include, like, strategic-planning documents or templates, sample MoUs that you've used, or anything else that you think might be relevant to others and that you're willing to actually share nationally on this website. The main part of the hub is actually the resources that live here. And you can search by topic to see different types of materials that we have available. So we have, like, New and Trending Topics, which include information from-- right now, it's information from the recent National Convening that took place in January. So all the--this links to all of the materials from that. And we also have more General Information that includes statute guidance around policy, and then more General Information that might be useful. You can--this is all integrated with the PeerTA library, so if you clicked "see all," you'd see this from the library view. So you can actually filter by the initiative and see all different types of resources here. So if I un-click this, for example, I'll see everything that lives under this initiative in one place. In addition to General Info, we have information on Career Pathways; One-Stop Operations, which include partnership information. There's also some

resources on performance and data, some things to help you with state plan development. And this will include a comprehensive listing of every draft state plan across the country, which will be added shortly. And then we have Target Populations as well. And this will grow, as we continue to gain more resources. So right now, the site is live and available for you to use, and we hope that you do. It'll continue to grow over time, and we're really interested in sharing a lot more peer resources, so that you all can learn directly from each other. So again, I encourage you to submit resources for the hub, so we can highlight the great work that you're doing. Before I turn the call back over, does anyone have any questions or...

Lisa Washington-Thomas: So, Jackie, I have one comment. The Q&A section on the PeerTA website is not for your official questions or your policy questions. Those would still go to your Regional Program Manager. But the PeerTA is, if you wanted a question answered by other people in the field. So typically, that's what we do. We might, if there's a question unanswered, we might go to a person that we know and ask them the question. But those aren't official ACF responses. Those are responses from your colleagues in the field.

Jackie Rhodes: Yes, good point. Thank you, Lisa. Okay. So I will turn it back over to the presentation. That's not the right one. One second--I'm having a technical difficulty. And then we'll get the presentation back. There we go. Okay. So now we're going to actually turn it over to the team from Mississippi, who's going to talk about their data-sharing and coordinated-service-delivery system in the state. So I believe James will be kicking off the discussion. So please go ahead, James.

James Williams: Thank you. Thank y'all for joining us on the call today. Welcome to the call from the great state of Mississippi, where it's 80 degrees, and the trees are beautiful, and the flowers are blooming. So if you're having snow or rain, tough luck. But in Mississippi, it's going well. I wanted to just start the conversation a little bit. Mississippi has been working on data for about 12 years, and Dr. Parisi has led that charge from day one. But in the beginning of the planning process for the WIOA law, we looked at data as something part of the process, but

it's not the process. And what I mean by that is, Covey says, "Begin with the end in mind." And what we did is we looked at how we're going to serve people, how we wanted to serve them, how we wanted to help them overcome their barriers. And then plug the performance and the data and the case management into that model. And so we spent a lot of time. And one of the most effective tools that we used for that was case studies, where we would draw up a scenario and say, "Okay, if you walked into a WIN Job Center and asked how we would improve this, with all our major players in the room." This shaped the conversation and shaped the direction for where we wanted to go in Mississippi and how we wanted to do it. And then Dr. Parisi and his brilliant sidekick, Jonathan Barlow, designed the technology and the case-manager assistant to do what we needed it to do. And Dr. Parisi has been working at NSPARC-- I don't know how long. I've been knowing him for about 12 years. He's a brilliant man. And Jonathan Barlow, who's his sidekick, is just a phenomenal person and a great facilitator. So I'm going to turn the rest of this over to them to make comments. Because they're really the experts in the data and the technology. And so, Dr. Parisi, take off.

Mimmo Parisi: Hey, James. Thank you so much. I will say only this for anyone that wants to integrate data, if you start with data, you end up with data. So I think James, you know, said it best. You know, you need to understand the policy, understand why you want the data to be part of the process. And so I think Jon is going to show how that policy really took place in Mississippi. So without any further ado, I want to let Jon [inaudible] the presentation. Jon, you ready for this?

Jonathan Barlow: Yup, I'm ready. Can everyone hear me?

Mimmo Parisi: Go for it.

Jonathan Barlow: Great. So a little bit about coordinated service delivery in Mississippi-- as we started thinking about the information side of this, there were basically two approaches that we thought through, and we realized that they were defective in some way. If you look at the

left side, one option is for a state to create a single cross-agency case-management system. And so this would be a big piece of software everyone would log into, every customer of every agency, whether you're at Rehab Services or the community colleges, would log into this same system. And the problem with that is that such a system doesn't exist. It's very difficult to make one. Also, you have thousands of staff members at all the agencies that are already trained on their own internal systems. And so this system really doesn't commend itself for our attention. On the right side, you notice that the other option is just to leave everything siloed--leave every agency with its own siloed system, and then retrospectively align data. So that's one possibility. But the problem with that is that, you know, you really can't-- you have to wait and see. Anything you try, you have to wait and see how it comes out. It's impossible to really find out kind of whether the things you're trying are working. It's impossible to align case management together. You can't pass participants from one agency to another without the possibility of letting them fall through the cracks. And so this position was a little bit untenable as well. So we kind of took the sweet spot here, and we decided, you know, as Mimmo and-- as Mr. Williams explained, we want to start with the process. What is it we really want to do? So we started with a common case-management approach. And it's the approach that we have in common. We're all going to be using the same model of service delivery. So that was very important, to be on the same page about how we wanted to help people. And then, secondly, we wanted to retain independent operation of the case-management systems of all the agencies. And as I said, you have all these staff members who are already trained, and they're used to working in these systems that are very custom tailored to do the work that these agencies do. And so we wanted to make sure we didn't disrupt the workflow of these agencies. But the third thing we decided to do was to create a state-owned common case-management technology that would kind of sit behind the other systems. And so it's kind of like-- it's almost like we've built an airport terminal. And all of the-- all of the different agencies can fly their airplanes into and out of this terminal, but they can still operate their own regional airports. And so we have this common case-management technology that the other agencies' systems can talk to, but it doesn't disrupt the way that the other case managers operate on a daily basis. So that's kind of the information-technology

approach we took, but it's really rooted in this common-case-management approach. This is a diagram that's pretty well-regarded. It's from the Alliance for Quality Career Pathways, and it's called the-- it's from a document called "Shared Visions, Strong Systems." So this is a diagram that we're borrowing. But it's very good. It shows you how career pathways work. You know, we have people coming to us from all walks of life. You have people coming to the TANF office who have a family, and they have trouble, maybe, with food security as well. You have people coming to Rehab Services who may have been recently injured and need to recover some sort of vocational ability that they've lost. You might have people that are coming to the job center who have been recently laid off, looking for Unemployment Insurance. We also have people that are looking to complete their high school education that come to Adult Basic Education classes. And so this model that the Alliance for Quality Career Pathways laid out, it shows you. There's this purple arrow. And you come into and out of this purple arrow in all different ways. You might come in to Rehab Services. You might come in to TANF. And then you might come out to do a first job on your career path. But then, you know, you might work toward getting a job that meets your family's needs better. You might go back and get some training from the community colleges under WIOA. Or you might get some training from some other program. And then you'll enter and exit several times, as you go through this purple arrow. So we really started thinking about this purple arrow. It's really what we're-- what we're aiming for here. We really want to have a system and approach that will help people manage their cases and manage their career pathways in an intelligent way. And so, with this purple arrow in mind-- so remember the purple arrow there-- we started thinking about and developing a Mississippi Works Smart-Start Career Pathway Model. And this is our model, the Career Pathway Model. And if you notice on the left, the participant comes in. And no matter what agency you come to-- whether it's Rehab Services. You might come to a local job center. You might come to a TANF office or SNAP office-- what you're going to be doing is, you're going to be engaged in the same sort of case management. And that will involve, at some point, filling out a Work-Ready Report Card, so that you can tell where you are relative to the labor market, getting some advice on what skills you might need, what training you might need, and what kind of opportunities are available in your labor market. You'll also be creating an Individual Success

Plan. So all the agencies will be helping someone create this success plan that specifies step one, two, three that you will need, and also all the supporting services, whether childcare or transportation or maybe even English language services--that sort of thing. This will help you see a plan. You can see the beginning from the end. You can see the different points along the way where you'll be doing different kinds of training or activities or maybe on-the-job training. So this Individual Success Plan is very important. Of course, many of the agencies will also have their own success plans. Rehabilitation Services uses a plan as part of their approach. And then, as far as TANF and SNAP go, for education and training, there are plans there as well. So each agency will have its own plans. But there'll also be this common Individual Success Plan. And then the success plan will send you out then on pathways. You might go out for training, and there might be some kind of exit strategy from the training. And you might--you might go back. You see the arrows, how they go back from exit strategy to the common case management area. And then, eventually, our goal is to hit employment. And if you notice that grey arrow at the bottom, all along the way, the supportive services are being re-tasked. So whether it's food insecurity that we're helping you overcome, or maybe it's transportation, or maybe it's childcare. Whatever it is, all of those supportive services are re-cast as being a help along your way in this career-pathway model. And so this model is kind of what informed our planning and informed our talking. We literally put a picture of this model up on the wall as we considered those case studies that Dr. Williams mentioned. So I'm going to show you some more of that in a moment. But this is basically the Smart Start Career Pathway Model. And you know, whatever state you're in, you could have a career-pathway model like this. But it's nice to have customer service at the center of all of your thinking. And so I--as a joke, there's the purple arrow right there. That's our common case management. This common-case-management aspect fulfills that role of the purple arrow in that chart I showed about the career pathway. The coordinating system is this common-case-management technology. It's the little blue square in the middle. And so the ABE-- Adult Basic Education--TANF, Workforce, and Rehab, they all have their own systems. And their systems will talk to this system in the background. And they'll share things like customer information. They'll share referrals. We can actually do an electronic referral from one agency to another. And that

way, it won't--someone won't fall through the cracks. This is already in place for the connection between Unemployment Insurance and Employment Services. And we also have the pilot in place, where we're directly referring people from SNAP E&T to the community colleges. So we've proven this model of using electronic referrals in two different places-- the E&T pilot and in the UI, Unemployment Insurance, employment-services model. And so it's been very effective. And basically, each agency will undertake a little project to modify their system just slightly, so that whenever a staff member, maybe, changes the address of someone in their system, that change of address will go to the common system. That way, all the partners can share and make sure we can contact the person. And you'll see later, this comes in handy for federal reporting, as well, because we can tell where people enter and exit. And we can look for gains. Maybe there's gains in test scores. Maybe there's gains in employment outcomes. And so the common system is what really powers the matching of the data and the collaboration over case management for the data. So here's a picture of the room where we did some case studies. This is a funny picture. You can see the three groups in the picture here. And up on the screen, you probably can't read it, but it says, "Exercise: Four Case-Study Examples." And so we went through these case studies. And you know, we constructed people that we might be likely to see at any of the agencies-- you know, maybe someone who has recently lost their job. And we had that person go to the unemployment-insurance office first. Or maybe someone has recently become blind and decided to go to Rehab Services to learn how to read braille and to operate with that particular challenge. And so we had several case studies, and they were very fruitful. So we talked through them. We had people from every agency, local and state, at the table-- literally at the table. And they were talking about these case studies, learning about how each other has different services that overlap, capabilities that overlap, learning where they can get some synergy going on some of the activities that they do. And so it was a very fruitful time. And so I'm going to take you through one of these case studies. And this is probably the best way to explain how the system will work. So our case study is Elvis Presley, a famous Mississippian, of course. And he was honorably discharged from the Army. And in the military, his occupation was truck driving. And Elvis is capable of passing an equivalency exam. So he's someone who's shy of

high school but is capable right now of probably passing an equivalency exam. He needs a job in the short term to support a family. But in the long term, he'd like to be a diesel mechanic, because he thinks that might be a career that he can have for longer, and it would be more conducive to his family life. And this guy, Elvis, walks into a local One-Stop Center. So he walks into the local One-Stop Center and says, "Hi, I'm Elvis." And he explains to them his situation. And you notice that the staff member at the One-Stop Center is using the UI system. So in Mississippi, the Unemployment Insurance (UI) system is a very good piece of software. And so there's no need to change-- no need to reinvent the wheel. The person at the WIN Job Center--at the job center-- says, "How can I help you?" And as he explains who he is and the fact that he's discharged recently and is eligible for Unemployment Insurance, they get him signed up for that. And notice that, as the case worker is working with his own system-- or his or her own system-- information is going to a common system. The common system is represented by the little cloud there. Notice, the profile goes in there. Any services that are given to the person. Also, there's a questionnaire. Every person, no matter where they start, will fill out a questionnaire. And it will have some diagnostic questions, such as, "Have you been recently laid off?" Another question might be, you know, "Are you hungry? Are you food insecure?" In which case, we could immediately generate a referral to SNAP. Also, it might say--what else? Maybe you--"Have you been recently laid off?" Might give you a referral to Unemployment Insurance. And "Are you in need of a high-school equivalency training?" Then that would submit a referral to the Adult Basic Education folks. So in other words, we start out with a questionnaire, along with your profile. And this questionnaire allows us then to automatically route the person to services that we think might be useful to them. And I'll step back for just a moment and revisit the Smart Start program. The whole reason why we thought through Smart Start is because we had a problem in Mississippi--a challenge, and the challenge is that we would like to get more people into middle-skill occupation. Most of our jobs in the state are for middle-skill occupations, and that's where we have the biggest gap between the supply of labor and the demand for it. And so we--you know, middle-skill occupation requires someone, really, to move beyond high school and get some sort of certificate or certification beyond high school that would give them some extra qualifications to get one of these hard-

to-find jobs. And so that's one of the big things we wanted to do is, we really were interested in any activity that will get someone through their high-school equivalency and into some community-college training or other kinds of workforce training. And so this questionnaire really helps with that as well. And then notice, the person, after they go to UI-- to Unemployment Insurance-- is a referral to ES. ES stands for Employment Services. So immediately, the person in Mississippi-- and this is already-- at least this part of the process is already in place. We already have a direct lane between Unemployment Insurance and Employment Services. And so the person's going to be referred to Employment Services. And notice, there's a self-service workforce system. One of the agencies in our WIOA plan, one of the combined-plan partners, has a customer-facing system. You can log in through your mobile phone. You can log in through a web browser at the library or at your house or at-- in a job center. And it's going to allow the person to generate a Work-Ready Report Card, allow them to generate a tentative success plan. Now, they're going to talk about the plan with a staff member later, but they're going to generate one on their own that kind of records their hopes and dreams. And then, you know--in this particular person's case, Elvis would like to be a diesel mechanic. So that's what the success plan all leads toward in his case. And notice, the common system will also receive any updates, if Elvis changes his phone number, maybe there'll be some profile updates. If Elvis updates his success plan, that goes into the common system as well. So next, he goes and talks to the staff at the workforce center. The workforce person says, "Hey, your plan looks great. But hey, you know, you-- you know, I know that you want to be a mechanic, but what about driving trucks? This is your military occupation. Maybe in the meantime, this would provide a stable income for you, and it might even be required for some of the diesel-mechanic jobs that you might encounter." And so they help him think through that. And so they might update his profile. They might update his plan to have an intermediate step toward becoming a truck driver. And then, in order to become a truck driver, he has to be licensed, which requires first a high-school equivalency. So there's going to be a referral to Adult Basic Education. You know, at this point, too, I'll just mention, since the topic of the call in part is about TANF and WIOA integration. You know, if this person had any kind of answers to the questionnaire that would indicate TANF eligibility, then certainly he or

she could be referred to TANF. And also, in Mississippi, the offices--the MDHS offices, the human-service offices that deal with TANF-- are also referring people to Employment Services. So they're really--they've really got a good system going to lean on each other. And TANF will then allow a lot of their employment requirements and their work-search requirements to be fulfilled by visiting Employment Services. And because it's all electronic, they're able to get back any kind of proof they need of the person doing the employment-service activities. So now there's an intake at Adult Basic Education. And the Adult Basic Education person says, "Hi, Elvis. Nice wrench. We were expecting you. Let's get you enrolled in an equivalency class." So again, the staff member is using their own system. They don't have to use the common system, but information goes into the common system--profile updates, the success plan for ABE, any kind of service enrollments that we might want to report under WIOA federal reporting. And then, of course, Elvis finishes his equivalency, and he's got a certificate. And the ABE staff member says, "Bye, Elvis. Ten-four, good buddy." And he leaves the room, and there's updates to the ABE plan, any assessment scores that might have been taken along the way, electronic referrals to-- back to Employment Services, and any kind of equivalency that was earned. So now he goes back to the workforce system. And the workforce person says, "Hi, Elvis. Nice high-school equivalency. Let's get you into truck driving school." So again, you know, any updates that are made will go into the common system. And then there's a training enrollment, right there, under some sort of program that might be WIOA Adult Training. Or it could be some other kind of training with Pell or something. But whatever will qualify, depending on what you're being trained in. You know, some things cover some things, and other programs cover other kinds of programs. In this case, some kind of training will be paid for. And he goes in to training. And he comes back, and he's got the industry-recognized credential to be a truck driver, some sort of new class license. Again, profile updates are made, any updates to the plan, the credentials earned, and then, Elvis goes out for the first exit from the purple arrow. He goes out into the world to be a truck driver. And as Elvis works, then, the common system will receive any wage records that his employer reports to the Department of Employment Security. And so the common system will receive wage records. And these are very important under WIOA. All of the WIOA programs and their partners are

judged by how well they meet the goal of introducing people to employment. And so the wage records are really the only way to know that someone has entered employment. And so this is very important for the system. You can think of Elvis. He's working as a truck driver. He's still participating in a career pathway. He's not where he wants to be yet. He wants to be a diesel mechanic. But at least we're getting the wage records. We kind of know whether we're successful or not in meeting his plan goals. So eventually, he comes back and says, "Hey, you know, I've been dreaming about working on diesel engines, and I think about it all the time. I'm ready to start that now. My family's in a good spot for this." And she says, "Hi, Elvis. Let's get you enrolled in further training to be a diesel mechanic." And so, you know, he gets the training enrollment. Maybe the workforce person helps him find a job that is more friendly to a school schedule. All these things happen, and he's enrolled. And eventually, he goes to the community college because of a referral, and they get him trained to repair diesel engines. And he, you know, goes in the system. They might--the community college has its own system for managing courses and achievement. Eventually, you know, a certificate will go into the common system that he earned his Associate's degree in diesel engine repair. And finally, at the end, you know, we have Elvis here. He's got three certificates on the wall. He's got his equivalency. He's got his truck driving certificate. He has his diesel engine repair Associate's degree. And he's finally put away the steering wheel in the trash, and now he's fixing engines all the time. And he's got a job that he really likes. It's a very good-paying middle-skill job. And again, employment and the UI wages that are being paid on his behalf by his employer will go to the common system, and we'll be able to judge the outcome of Elvis's work. So that's sort of the case study. And if you see the common case system here--the cloud--that's represented by the cloud. It's not in the cloud, but we're just using that as a representation of it. The common case management technology will allow us to do sector strategy analysis. All the data from that about all the jobs that employers are posting, all of the jobs that people are landing--all of that will be very helpful in understanding what kind of sectors are hiring and what kind of sectors need trained folks. We'll be able to do federal reporting as well, because we'll be able to line the data up from agency to agency and then be able to report the data, then, under the WIOA reporting requirement. And then finally, we'll be able to do a real time

performance assessment. So you know, we're not just waiting till the end of year to see what happens. We're going to have dashboards that all of the partners can access. And the dashboards will show in real time, you know, how many people are waiting to be contacted after a referral? How many people are in their pathway? How many people have exited this month? How many people have entered employment this month? So we're going to be--have a lot more real-time appreciation for how well the system is functioning and how well we're all working together. And so, for us, you know, the federal reporting is kind of the--you know, you can't do without that, right? But the real-time performance assessment, that's where we really think that the best benefit to our participants is-- really helping people understand, you know-- helping everyone at every agency understand how we're serving customers. Are we serving people well? Are they being trained? Where are they in the process? This way, we don't let anyone fall through the cracks. In fact, there's even-- we've even institutionalized that a bit in our WIOA plan. There's a person at each of the four workforce areas who's really assigned to keep an eye on the prize, really--keep an eye on--make sure everyone is being served and to kind of help adjudicate any kind of situations that might be complicated when you have services from multiple agencies. So we do have a person in the loop to which other staff members can appeal for help or for assistance in understanding the approach. A couple of things about the data-- what are the data artifacts that make our approach possible? First of all, we need a common participant profile. Whenever John Smith comes to TANF, John Smith has to have a record that's the same John Smith that goes to Unemployment Insurance or who goes to MDES for Employment Services. So we need a common participant profile. And that's very important. And the system helps us to maintain that. The next thing is a diagnostic questionnaire. Everyone that goes to an agency will be given a questionnaire. And the answers to this questionnaire will be run through a system of rules. And this will allow us to automatically refer people to agencies beyond the one where they were initially-- where they initially performed their intake. The third thing is electronic referrals. Electronic referrals are great because they formalize the passing of a person from one agency to another. And so, you know, they could-- you know, it's basically one agency saying, "Yes, serve my customer. My customer's already consented to being served by you. We're referring them over to you." So

there's this great-- there's a lot of benefit to electronic referrals. You can track them. You can measure performance. You can even assign certain staff members to watch the referral and contact people who are referred, and make sure they come in for help. The Work-Ready Report Card-- this basically helps someone understand their position relative to the labor market, understand what kind of occupations are available to them at their current level of training or skill, and what kind of occupations might be available if they just received a little bit of training. So the report card is really meant to be aspirational, to show people where they are and where they can get and how long it will take to get there. Third--the next part is the Individual Success Plan plus any agency addenda to the plan. You know, you can't get to the destination without a plan. And so we think the existence of a plan is very important. And it's not listed here, but there's going to be a business plan that correlates with every success plan. And the business plan will be worked out at the local level, and it will help to explain very clearly the mix of funding from the different agencies that will pay for different aspects of the plan. So as soon as someone needs a service at more than one agency, well, we realize there's going to have to be some sort of business plan that will govern how the agencies will work together to fund the person's plan. Now, some agencies are very self-contained in some of the things that they do. They may not need a business plan that spans multiple agencies. But as soon as that's needed, we realize that you need to have a vehicle for coordinating that-- those finances. And so there'll be a corresponding business plan to every success plan that involves multiple agencies. You need a common service catalog so that, at the end of the year, you can tell that this person received--for instance, they might receive transportation services from one agency. Having a common catalog allows us to make sure we don't duplicate and receive transportation vouchers, perhaps, from two agencies. So it really brings efficiency to the system. A common assessments catalog-- some agencies use tests to determine whether someone is ready for different kinds of workforce activities. Some of them measure grade level, for instance. ABE measures grade level with the Test of Adult Basic Education. And so we need to have a common catalog of assessments, and we want to make sure everyone records the scores for those. And also a common credentials catalog. What kind of credentials are out there that a person could earn that make them very employable? And so that's another part

of it that's very important. Let's see. This is just a summary of what I talked about. Every agency has its own system. They do intake. They send the profile and the questionnaire to the-- to the main system. There's a decision tree, there's some storage, and there's participant info in this main system. And then referrals will go out to all the agencies. If you want to check it out, we have--we've spent a lot of time explaining how the data will flow through our system. This is a diagram for our WIOA plan, and I'll show you this page here. You can see the cover of our WIOA plan. It's at Mississippiworks.org. It's a very large PDF. But if you'd like to download the plan, it really has all of the various things that I've just described in there. It has a lot of diagrams that explain how the data will flow. It has a lot of explanation of just the case model-- how we're going to be serving people. So I think it'll be very helpful, if you're interested in more of the model of service that we're giving to people. That plan will really have everything you need. It will have more detail than I've been able to get into just now. Another thing I'd recommend, too, you know, in the broader discussion of how to align data-- we've uploaded-- Okay, I hear someone talking. I-- There's a--we also uploaded a MoU template. This is template that shows a little bit about how we're making agreements between agencies for sharing data. There's a PDF, I know, that's on the resources tab here on the presentation. You can take a look at that. You'll notice how short the MoU is. That's very important. But this is just one example of an MoU that we use and modify to work with various agencies. And I'd also recommend going to lifetracks.ms.gov. You go to lifetracks.ms.gov. That's our state longitudinal data system. There, you can learn more about the various entities that agree to share data in Mississippi. The LifeTracks project will be integral to our WIOA project, because LifeTracks will be where we align the data. It'll be where we do our federal reporting. It'd be where we do our performance measurements. So that project is very important. It kind of laid the groundwork for all of the good relationships that are making the WIOA relationships possible. And Mimmo, you have anything to add?

Mimmo Parisi: No, I think you did a fantastic job, Jon, as always. Thank you so much.

Jonathan Barlow: So that's the end. That's all we really wanted to say formally. But I figured, you know, questions will get us to the questions that people really have on their minds, so...

Mimmo Parisi: Yeah, I think it would be best just to field unusual questions.

Jackie Rhodes: So we're going to open the line up. If you do have a question or a comment or anything you'd like to share, please press star-6. We have one question online. Nicole asks, "What other measures will be included in the real-time performance assessment?"

Mimmo Parisi: We're still—

Jonathan Barlow: Uh... Sorry, Mimmo. Go ahead.

Mimmo Parisi: Well, the idea of the real time is more to create the warning systems, so nobody falls between the cracks. And so we're going to learn about what other things we need to know to make sure that the program is implemented appropriately. So those will be basically something that will be fully defined in the next two months.

Carol Mizoguchi: Hi, this is Carol Mizoguchi, and I just have a question as far as--and that was very helpful, who discussed-- whoever just talked about the warning systems. Because I'm just thinking about who owns the clients. Because just thinking about, especially, like, with-- TANF participants usually don't follow that straight path where everything is just going great, and you go from this service to that service-- but when there's disruption. So how is that managed and determined, how you prioritize what services the person needs to go into? And who's responsible for making those determinations?

Mimmo Parisi: Well, a couple things. I mean, the system, you know, has that common case management-- the purple arrow that Jon was talking about. But within each local workforce area, there will be an individual or resources that will basically, you know, monitor the flow of

people that come through our system. And that will also be determined by the business plan and the resources that are available. So you know, those are all things that, basically, will be determined at the local level. And those will be, maybe, in the next couple months. James, within a couple months, they're going to come up with some sort of plan on how to do all those things, right?

James Williams: Yeah, the main thing is that, if a person comes in, there's no wrong door. So if a person comes in-- let's say comes in through TANF, TANF is the primary case manager for that person through the pathway. If they come in through Vocational Rehabilitation, Vocation is the primary. So they don't give up ownership of that client. They receive services from their partners. Does that make sense?

Carol Mizoguchi: Yes, that's--thank you.

James Williams: All right.

Carol Mizoguchi: The entry point.

Jackie Rhodes: Are there any questions from any of the states on the line? And if you want to speak, just remember to press star-6 to un-mute. Such a quiet group. Any other federal staff from OFA Central Office or Regional Office have any questions or comments?

Mimmo Parisi: James, you want to ask another question?

James Williams: No.

Jonathan Barlow: I'll say a little more about the process going forward in Mississippi, if that would help. Right now, we've--you know, we're all agreeing on the plan. We've submitted it. It was returned to us with a provisional approval, and we've been working on a few little details

and will be submitting it again this week. And then, the very next thing we're going to be doing is meeting together to hammer out some of the software teams from the different agencies that will be working together to work out the common system. The common system has been designed, and we are working with the vendors of the various agency systems. And it's been a very smooth process, actually. And we have a document that describes the interface that each of the agency systems will use to talk to the common system. And then, on the other side of the equation-- that's the data side. On the other side of the equation is the more procedural side. And right now, the local workforce areas-- we have four in Mississippi-- are already working on their local plans. And their local plans are being created according to some guidelines that the state Workforce Investment Board sent out. And the guidelines really-- they ask the local areas to take the state plan and to really show how it's going to be put into effect at the local level. How are they going to align resources? How are they going to work out the One-Stop delivery system? Part of our plan involves that each workforce area will have at least one center where they have staff from all of the agencies present-- so kind of a combined center. So the local plans will specify how that works. We're also--we have more discussions ahead to figure out how the business plan will be formatted and how that will work. But, you know, we're all-- we're all aligned in the common approach to case management. We have a plan at the state level that we've all agreed to. And then we have this idea of how the technology will work. And so, you know, we're just basically now in the process of implementing. The Department of Employment Security is working hard to implement the common system. And so they're taking the lead on that and supporting the work of that, so that's very, very helpful. And the great thing about the system--it will be state-owned. So the state won't have, you know, any kind of external vendor that they're working with. We're going to be doing it here at the university and working with Employment Security. So in the end, we'll have a system that we own that connects the other agency systems and they're able to maintain their own autonomy in how they manage their data. But at the same time, we'll have the ability to share data necessary for case management. And then the local and the state level will have a good relationship too, because everything will be proceeding across very clear lines. And so that's kind of where we are now. We're at the--we're at the

point where the rubber's meeting the road. And so it's been pretty exciting the last couple of weeks. And then we have a meeting this Friday, where we'll be meeting together to plan the very next set of kickoff meetings for the technology development.

Jackie Rhodes: That's great--really helpful.

Lisa Washington-Thomas: I have a question. This is Lisa. I was wondering, did you have to go through any-- did you have any challenges being able to share the data regarding any-- were there any safeguarding or disclosure issues that you had to overcome?

Mimmo Parisi: You know, that's a good question. And definitely, we were very vigilant and very kind of, you know, careful on how we were going to kind of share the data. So those were questions that were posed but there were no challenges. So because we knew how the data was going to help achieve the big goal of common case management, so we worked within the policies and regulations to make sure that we were staying within the [inaudible], so to speak. And then we found a way to meet all the policy and [inaudible] and privacy kind of requirements. So all those things have been, you know, ironed out and resolved. And so they were not really-- they were not really a challenging issue. It was important that we needed to be aware and be kind of concerned about how we were going about sharing the data. But no, it was not really a big, big issue. Because you really have to tell the story--it really tell-- You know, if you tell the story of why you did what you did, and you will see, whether it's FERPA or HIPPA-- in those regulations, there is no provision that says you can't share data, as long as you improve the quality of the program for the customers. And so you want to, you know, know what the story is, how you're going to do it. You're going to find ways to have your lawyers in the room to provide [inaudible] in way that you can actually do what you express there. And so, if you start with the lawyers, you will never end, and you will never get anything done, so...

Lisa Washington-Thomas: Right. Okay, well, thank you so much for a great presentation. I am--it lived up to all my hype. I am really pleased to see it. And I'm also pleased to see how you are implementing and administering a career-pathways program and then how you're sharing the data around it. We have a keen interest in career pathways, as you know, in the WIOA law. So I hope you don't get too tired of me asking you to share the many aspects of your wonderful story. So thank you so much, Jonathan, Mimmo, and James. I think this was great, and I really, really, truly appreciate it. And I want to thank everyone else--

Mimmo Parisi: You're welcome.

Lisa Washington-Thomas: Right. I want to thank everyone else for their attendance on today's call. We hope you found the conversation valuable. I did. Our next Affinity Call will take place Tuesday, May 10 at the same time. During that call, we'll highlight other peer exchange sites. And if you have a specific innovative or best practice that you would like to share, please contact us. Either contact your facilitator, or contact anyone you're-- anyone from the federal offices, and we will share it with you. Also, please remember that any resources that you want to share on the TANF-WIOA hub, please do so, or please let us know so we can share them. You're kind of at the forefront of moving this TANF-WIOA integration, with your plans and with your meetings and your partnerships. So--and there are a lot of other states who-- and localities who are not as far along as you are. So if you have any tools or information that you would like to share, please upload them to the WIOA hub. I don't have anything else. I'll turn it over to Jackie to see-- do you have anything else that we need to share?

Jackie Rhodes: No, I think that's all for today. But thank you all so much for joining, and thank you to the Mississippi team for sharing.