

## Bay Consortium Workforce Development Board

**Policy Number:** 22-02

**Effective Date:** February 1, 2023

**Title:** BCWDB Workforce Portal Utilization Policy

### PURPOSE

The Virginia Board of Workforce Development’s (VBWD) strategic plan includes the goal to “Increase awareness, accessibility, and usage of the Virginia Career Works Job Seeker Workforce Services Referral Portal (“Portal”) to connect workers to sustainable jobs and provide actionable information to decision makers within Virginia’s workforce development system.”

This policy provides guidance for leveraging and utilizing the Portal to improve efficiency, transparency, and outcomes for all workforce partners in the Bay Consortium region.

### BACKGROUND

A primary goal of the Portal is to allow job seekers to register for services and to identify appropriate referrals for workforce programs and services. The business value of the Portal to the Commonwealth includes:

- Reduce redundancy of client paperwork
- Increase efficiency by sharing client information across providers
- Increase data transparency to better allocate funding
- Increase management of co-enrollment of clients
- Enable self-service access to workforce resources by clients
- Streamline client access to services through a single online source to request program services without having to use multiple systems

The foundation of the Portal is the Workforce Data Trust established by State code (*see section on References for additional information*) and requires a central repository of data from all workforce programs and services be established and available for performance reporting and sharing information between workforce partners.

### REFERENCES

- *Code of Virginia, Section 2.2-435.8.* Defining the use of the Virginia Workforce Data Trust.
- *Code of Virginia, Section 2.2-2472.* Powers and duties of the Board; Virginia Workforce System created.

## **DEFINITIONS**

*Data Trust* - As defined by State code, the Virginia Workforce Data Trust is a centralized workforce data repository maintained by the Secretary of Labor of the Commonwealth and integrates related workforce organizations, systems, data elements, and functionality.

*System of Record* - Technology platform supporting the individual Workforce Innovation & Opportunity Act (WIOA) programs including VOS for Titles I and III, AWARE for Title IV, etc.

*Target Portal Utilization Rate* - The proportion of active/new clients requesting services as reported by the program systems of record compared to the number of active/new clients registered the portal.

## **POLICY**

To fully realize the benefits of the Portal, there is a need to ensure consistent and comprehensive usage of the portal across all American Job Centers (AJC) in the Bay Consortium region.

A phased implementation (Attachment A) shall begin January 1, 2023. The Bay Consortium Workforce Development Board (BCWDB) must complete an implementation plan that will lead to full adoption and utilization of the Portal no later than June 30, 2023. This implementation plan, includes a client onboarding process with action and timelines, and shall be completed and submitted to the Director of the VBWD no later than February 28, 2023.

Beginning July 1, 2023 all new AJC clients shall be onboarded through the Portal and all subsequent referrals shall be recorded and tracked through the Portal.

A phased implementation plan has been developed for initial launch and maintenance. Attachment A. Implementation of the Portal shall remain ongoing and featured as a monthly topic in Partners meetings.

### **A. BUSINESS PROCESS**

#### **DOCUMENTATION PROCEDURE**

The Portal is a system of documentation that supports service referrals. The Portal provides the Bay Consortium with the ability to better plan, coordinate, and establish referral control processes for Virginia Career Works services to ensure timely response, transparency, appropriate access, and approved authorized staff.

The Portal access will be provided both on entry to any Virginia Career Works Bay Consortium Regional service guest, customer, or referral agency. The portal will also be present for usage in Center lobbies and resource rooms, as well as accessible to various electronic links and outreach materials and forums.

Image 1. Customer Portal Flow

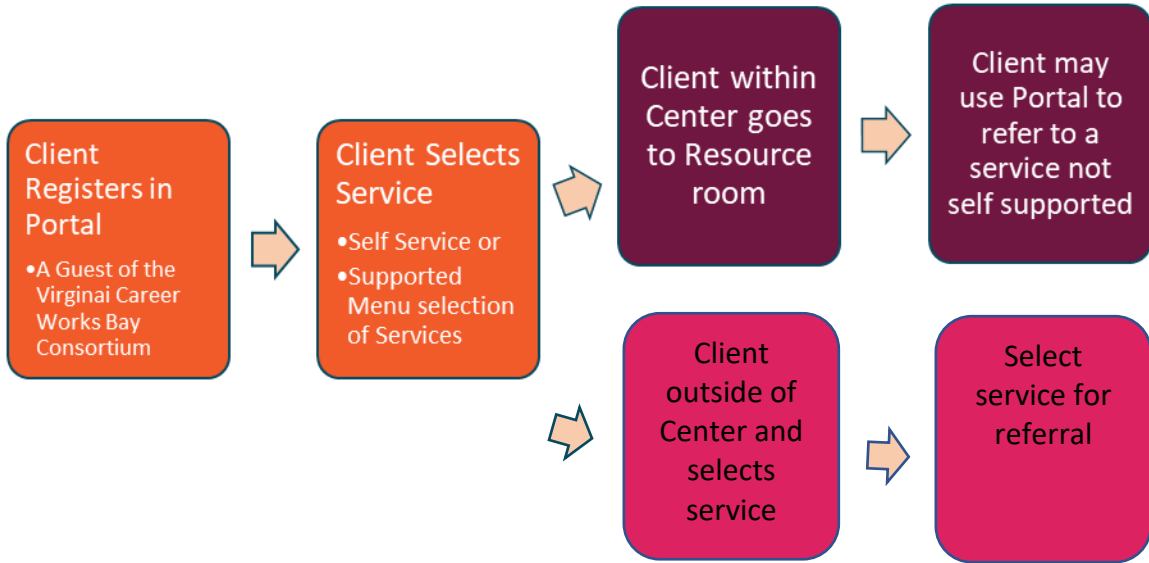
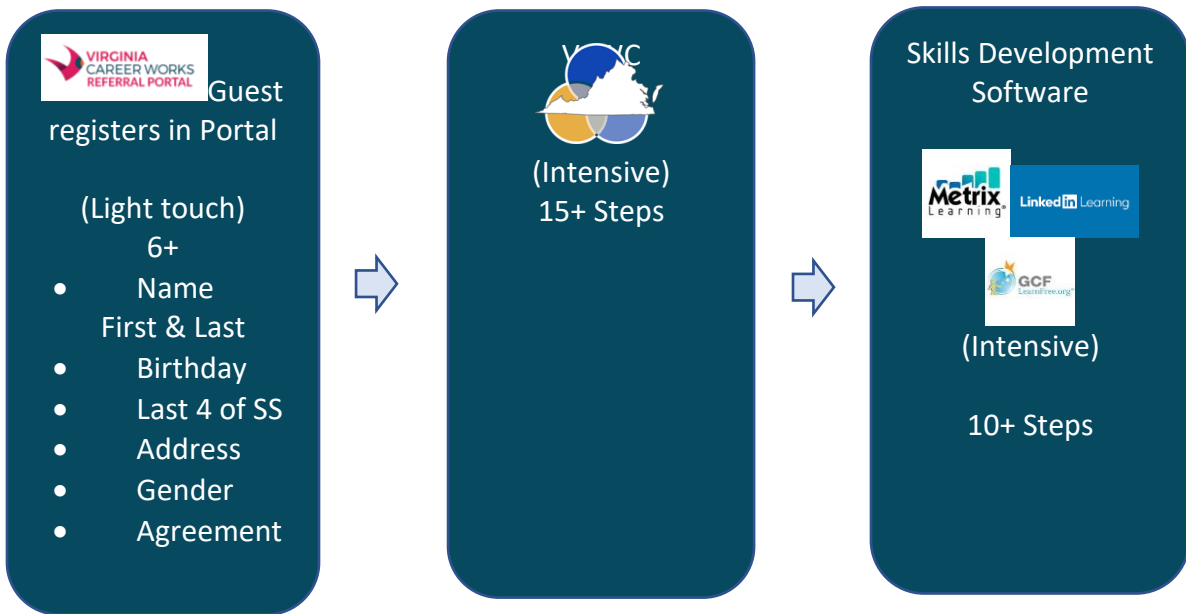


Image 2. Portal Flow with Center Databases



## **B. SYSTEM USERS**

### **1. PROFESSIONAL REGISTERED USERS**

All affiliated partners with a completed MOU will have access to the Portal's Professional Center and the ability to assign at a minimum 1 primary referral staff professional and 1 back-up user. All professional users will need to complete the VCW Referral Portal Professional Center Access Request.

Access to the Professional Center will enable workforce professionals to:

- Create and manage groups of clients for easier reporting and management
- Recommend or assign additional referrals to individuals or a group of individuals
- Custom configuration of participant information
- Access and generate dynamic reports on clients' demographic, barrier, and referral data
- Export data into CSVs

### **2. CUSTOMER USERS**

Any individual with a phone number or email is able to register as a user of the Portal as a customer. Customers can potentially be employers (register as an individual representative), job-seekers, workers, educational provider, and youth. The Portal is designed to count Center service traffic and should be integral to all Center traffic.

## **C. DOCUMENTATION PROCESS**

The Portal documents the contacts points (referrals) a client makes through the Bay Consortium in an electronic forum.

If the portal is disabled due to a power outage, internet network outage, or other documentable technical challenge. Referrals can be made through a paper forum and case notes and referral documents can be uploaded into the portal as show-proof.

The portal is an electronic system which must account for digital literacy needed of clients or challenging to clients with limited technology access. Clients will always be invited to enroll in the referral system however, failure to actively use the system will not prevent the provision of service. Clients can be provided support to enroll through interpreters, physical assistance, etc. to increase accessibility and overcome barrier.

**D. METRICS**

Starting in July of 2023, the portal will be fully integrated into Bay Consortium client customer service flow. However, this goal is geared towards a metered increase of enrollment to be achieved prior to official launch to encourage usage in a soft launch.

Metric goals:

10% of in-person clients to use the Portal by April 2023

35% of in-person clients to use the Portal by May 2023

75% of in-person clients to use the Portal by June 2023

100%\* of in-person clients to use the Portal by July of 2023

\*Clients whom refuse will be provided an electronic invitation for service but will not be barred from receiving services.

**E. STAFF REFLECTION PROCESS**

The Portal is an evolving electronic referral mechanism, and it is anticipated that documents will be regularly reviewed and at a minimum an annual report of usage be created and reviewed by the Bay Consortium leadership committees.

Success of the Portal is directly tied to staff knowledge and usage. Staff training is also directly tied to avenues of training and learning. Materials will be created as stand-alone training tools that will be reviewed as part of the annual report. Updates and changes will be made to ensure that training materials are accurate and reflective of current processes.

Attachment A

Activity	To-do items	Target Date	Bay Consortium Region Targets
<b>Step 1. Staff Communication</b>	The COVID-19 pandemic has created a greater need for workforce programs to quickly and easily connect client with critical workforce development resources and other state services. The Portal serves as an uniform virtual tool to connect.		
A1. Staff orientation of the portal	The Portal has gone through several reiterations and the Portal will be introduced or re-presented to affiliated agencies. Agency leadership will have the opportunity to review the established Portal and discuss within their organizational structure.	October 23, 2022- December 2022  Completed	Targets are established for the entire Virginia Career Works Bay Consortium Region consisting of the (Eastern Shore, Northern Neck and Middle Peninsula, and Fredericksburg locations).
B1. Affiliated Agency Messaging	Each affiliated agency that is participating in the Portal will have the opportunity to submit the display information they want to offer on the Bay specific Portal menu of services. The	January 1-January 31, 2023  Ongoing update	

BAY CONSORTIUM REGION

	option will remain open for updates and items to be added with a designated review and processing period.	option	Based on staff size and access the following are anticipated to be completed in this order:
C1. Staff Professional User selection	Agency affiliates will select their designated Staff Professional Users, and all will complete the VCW Referral Portal Professional Center Access Request, read and watch the Article: Managing Referrals. In addition, at least 1 triage staff person will be designated from the Center staff at each Bay location to have overarching access to the Portal for quality review and dissemination of referrals.	Initial Paperwork Submission Deadline to One-Stop Manager: January 13, 2023  Processing Period: January 1, 2023- March 1, 2023	Eastern Shore Fredericksburg Center Northern Neck and Middle Peninsula *Any future Center locations

Activity	To-do items	Target Date	Bay Consortium Region Targets
<b>Step 2. Staff Training</b>	The portal is a centralized place to capture client information and share relevant information with agency-specific systems. This reduces duplicative paperwork required by the various state agencies and dramatically increases service efficiency by sharing information with professionals who are serving the same clients. In addition, one unified system increases transparency and generates data for ongoing program improvements.		
A2. Training Development	It is understood, while general training resource are available, Centers should develop training that incorporates the overall workflow of the Center-Virginia Workforce Connection, Skills Learning databases, etc. training elements will include: A. Recorded video Pictorial guide with narrative (translated into SPANISH) B. Confirm all locations for loading of C. Portal connectivity (computers, lobbies, tablets, phone) and test access to ensure display matches training material	Development Period for One-Stop Manager: February 1, 2023- February 30, 2023  Presentations scheduled for March 2023 for Staff Professional Users	Targets are established for the entire Virginia Career Works Bay Consortium Region consisting of the (Eastern Shore, Northern Neck and Middle Peninsula, and Fredericksburg locations).  Based on staff size and access the following are anticipated to be completed in this order:
B2. Close-the-loop Training	Triage staff will be provided the initial training these are the key leadership individuals at the 3 regional Center locations: Center Navigator Program Specialist Eastern Shore Workforce Services Manager WIOA Youth Influencer	March 1-12, 2023	Eastern Shore Fredericksburg Center Northern Neck and Middle Peninsula *Any future Center locations
C2. Professional User Training	Presentations scheduled for Staff Professional Users for a target 1.5 hour training offer sessions in-person, virtual, and hybrid in each particular regional Center location. <i>Particular cross training to highlight client</i>	March 12-31, 2023	

**BAY CONSORTIUM REGION**

	<i>data shared with Geographic Solutions Eligibility System.</i>		
D2. Center Staff Training	All Center staff will be trained on assisting clients to establish and navigate the Portal.	April 2023	
E2. Staff Training Access	The Center will have adapted an interface to host communal staff meeting notes, training materials, and general messaging. And commit to launching a training program in the case of the establishment of additional physical Center locations.	May 2023 establishment and ongoing access	

<b>Activity</b>	<b>To-do items</b>	<b>Target Date</b>	<b>Bay Consortium Region Targets</b>
<b>Step 3. Client Communication</b>	When clients create an account, the portal asks them for basic information. The language is simplified to avoid bureaucratic jargon. The Portal captures the client’s information and barriers to personalize service recommendations. As clients provide more data, portal recommendations grow more accurate. Once the client completes the user profile setup, the client can review a selection of service options to add to their “My Journey” page. Each referral and service option guides clients to explore different program resources.		
A3. Online Access	The Portal is accessible through the Bay Consortium website (baywib.org).	Completed	Targets are established for the entire Virginia Career Works Bay Consortium Region consisting of the (Eastern Shore, Northern Neck and Middle Peninsula, and Fredericksburg locations).  Based on staff size and access the following are anticipated to be completed in this order:  Eastern Shore Fredericksburg Center Northern Neck and Middle Peninsula *Any future Center locations
B3. Establish Outreach Entry Avenues to the Portal	The Portal is envisioned to be convenient and accessible the following access points have been identified through current marketing and outreach for the Portal link to be added, mainly as a QR code: A. Added to organizational tagline as an access link to the center B. Center general flyer C. 1 large front door poster for each D. Center highlighting our online registration E. Business cards and signature lines on emails F. Slideshow for Resource Room computers with steps and some print out instructions-languages such as SPANISH, DARI, etc.	March 12-31, 2023 Establish marketing drafts  Include in Staff Training April 2023 for setting up  Items needed for Soft Launch	
C3. Soft Launch of public enrollment	All Centers will have the signage posted concerning the Portal. Lobby and Resource Rooms will have all computers and tablets with links to the portal.	End of April 2023	
D3. Regional	Center announcements on social media	May-July 2023	

BAY CONSORTIUM REGION

Public awareness campaign	(Facebook, Instagram, Youtube, Twitter, etc.)		
---------------------------	---	--	--

Activity	To-do items	Target Date	Bay Consortium Region Targets
<b>Step 4. Staff Process Reflection</b>	The Portal is a system of documentation that supports service referrals. The Portal provides the Bay Consortium with the ability to better plan, coordinate, and establish referral control processes for Virginia Career Works services to ensure timely response, transparency, appropriate access, and approved authorized staff.		
A4. Establish Metrics	The following Leadership divisions will approve formal metrics, policy and procedure for the Bay Consortium Portal implementation.	January 2023  One-Stop Committee  Executive Committee  Board Approval	Targets are established for the entire Virginia Career Works Bay Consortium Region consisting of the (Eastern Shore, Northern Neck and Middle Peninsula, and Fredericksburg locations).  Based on staff size and access the following are anticipated to be completed in this order:  Eastern Shore Fredericksburg Center Northern Neck and Middle Peninsula *Any future Center locations
B4. Affiliated Agency Feedback	Affiliated agency leadership will have the opportunity to review Portal progress by sharing of Metrics goal status and also share user feedback.	Ongoing-Monthly	
C4. Ongoing Staff Messaging	Staff will receive monthly and quarterly reminders of the Portal by sharing of Metrics goal status during interagency staff meetings. Should metrics fall well below target marks.	Ongoing-Monthly and Quarterly	
D4. Leadership Feedback	Affiliate Agencies will have the opportunity to review Portal metrics and review feedback during quarterly Board Meetings.	Quarterly	
D4. MyJourney Report	The Bay Consortium uses a number of databases both free and fee-based. An annual report of progress is both a requirement to measure investment but also review growth, assess barriers, and overcome challenges. The report will include user feedback gathered by quarterly surveys to a sample of users through engagement virtually through a personal survey. The Center also uses a Customer Satisfaction Survey tool and will track comments and feedback an incorporate into reporting.	June 30, 2023 and annually in June thereafter	