

# **OKLAHOMA WORKS ANNUAL CONFERENCE**

**April 12-14, 2017**

**Focused Conversation: WIOA Regional Roundtable  
Discussions**

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## EXECUTIVE SUMMARY

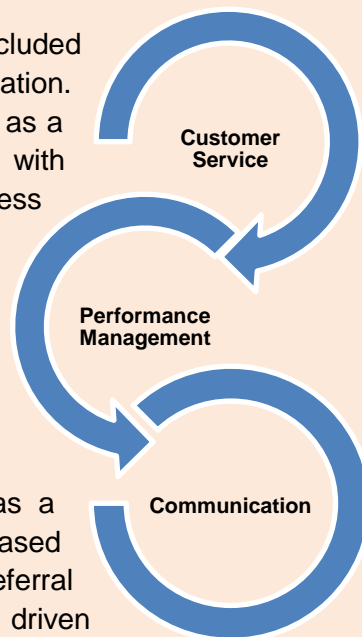
The Workforce Innovation and Opportunity Act (WIOA) Title I, Adult & Dislocated Worker Programs represent a renewed commitment to workforce development through innovation and support for individual and national economic growth. It aims at increasing opportunities, particularly for those facing barriers to employment, and invests in the important connection between education and career preparation. It looks to the prosperity of workers and employers and focuses on the economic growth of communities, regions and states to enhance our global competitiveness as a country.

In order to receive Title 1 monies under WIOA and as part of the process for developing the state plan, regions were identified with the purpose of fostering partnerships necessary to reduce costs and meet training needs of our work force. Additionally, planning regions allow WIOA resources to be more effectively and efficiently managed.

On Thursday, April 13<sup>th</sup>, the Oklahoma Works Conference proceedings provided facilitated Regional Round Table Discussions focused on WIOA and the recent regional planning process. The Oklahoma State Department of Health (OSDH) Office of Partner Engagement (OPE) provided group facilitation services to include Technology of Participation (ToP) Focused Conversation Method and Summary Report.

Common themes identified throughout the roundtable discussions included customer service, performance management, and communication. Participants noted collaboration, resource alignment and leadership as a strength of the planning process while other shared challenges with budgets, information technology, and a general lack of staff awareness for existing work force development services among WIOA partners. Ideas for effective implementation and sustainability of regional plans included a need for a high level of engagement and communication among partners; localizing services to meet the needs of the community; accountability to and transparency of the regional plan; and sharing with leadership what is working.

Overall, participants believe that customer service will improve as a result of regional planning and a focus on partnerships. Increased number of customers served; improved technology access and referral systems for clients across regions and among partners; and efforts driven by business and industry needs were comments shared. Further, participants defined a vision for success for the new regional planning process to incorporate inclusivity and access for all; sustainable wages for job seekers; and wealth creation for the state. The steps needed to achieve this level of success included flexibility and understanding that the plan will likely have modifications as the plan is implemented; sector strategies and discovery of gaps in client services; and commitment to the plan.



## INTRODUCTION

The 2<sup>nd</sup> Annual Oklahoma Works Conference was held April 12-14, 2017 at the Cox Convention Center in Oklahoma City. Conference attendees included more than 400 Oklahoma Works System partners from across the state representing higher education, career technology, Native American tribes, public health, workforce development, rehabilitation services, correctional systems and others. Conference learning objectives and goals included:

- Exploration of Oklahoma system partners in the promotion of a state-wide vision to connect education and training with the needs of Oklahoma's economy;
- Alignment and use of state data to help determine skills gaps, workforce issues and trends;
- Support the expansion of partnerships to better connect education and training providers to the needs of business; and
- Modification in the use of resources and incentives to support an integrated vision.

Oklahoma Works is an initiative to increase the wealth of all Oklahomans through facilitating quality employment for workers and ready availability of highly skilled talent for business and industry. The initiative is a coalition of state agencies, educational institutions, businesses and partners.

As an Oklahoma Works System partner, the Workforce Innovation and Opportunity Act (WIOA) Title I, Adult & Dislocated Worker Programs represent a renewed commitment to workforce development through innovation and support for individual and national economic growth. It aims at increasing opportunities, particularly for those facing barriers to employment, and invests in the important connection between education and career preparation. It looks to the prosperity of workers and employers and focuses on the economic growth of communities, regions and states to enhance our global competitiveness as a country.

In order to receive Title 1 monies under WIOA and as part of the process for developing the state plan, regions were established by the Office of Governor Mary Fallin, based upon stakeholder feedback with the purpose of fostering partnerships necessary to reduce costs and meet training needs of Oklahoma's work force. Additionally, planning regions allow WIOA resources to be more effectively and efficiently by placing an emphasis on direct training on the state's most in demand occupations.

The local WIOA boards and chief elected officials in each planning region were required to engage in a regional planning process for Program Year (PY) 2017 that included:

- Prepare a regional plan
- Establish regional service strategies
- Develop and implement sector strategies
- Collect and analyze regional labor market data
- Establish administrative cost arrangements
- Coordinate transportation and other supportive services
- Coordinate services with regional economic development services

- Establish and agreement concerning how the planning regions will collectively negotiate and reach agreement on local levels of performance and report on performance accountability measures

## FACILITATION PROCESS

On Thursday, April 13<sup>th</sup>, the Oklahoma Works Conference proceedings included facilitated Regional Round Table Discussions focused on WIOA and the recent regional planning process. The OSDH Office of Partner Engagement (OPE) provided group facilitation services for the roundtable discussions.



The OPE collaborates across disciplines and community sectors to create strategic partnerships and engages individuals, anchor entities (city planners, libraries, hospital, schools workforce investment boards), and other key stakeholders to implement workable solutions to complex health issues with the goal of improving overall health.

For this process, the OPE utilized the Technology of Participation (ToP) Focused Conversation Method to facilitate four round table discussions focused on WIOA's Regional Plans. Facilitation questions were developed by the Oklahoma Works Conference Planning Committee and vetted by Directors for each WIOA Region. Comments were documented during the sessions and compiled into this summary report by the OPE. The report is available for public viewing on the Oklahoma Works and OSDH websites.

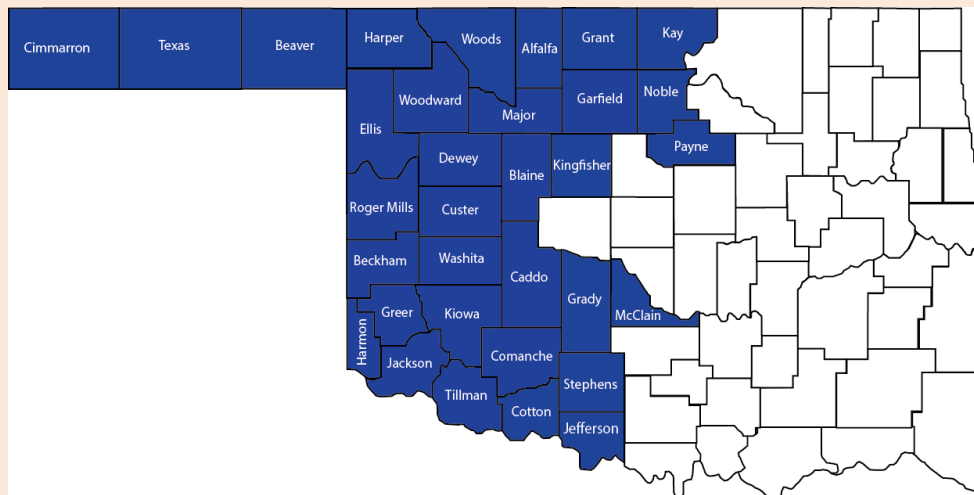
ToP Focused Conversation Method provides for a meaningful exchange of ideas by involving participants in thinking through difficult or intriguing issues. Outcomes of the ToP Focused Conversation Method include:

- Increased group awareness of the perspectives, thoughts, emotions, interpretations and decisions of its members;
- Deeper understanding, alignment and inclusion of group members and their ideas;
- Mutual understanding of the group's purpose, needs and intentions; and
- Establishment of a foundation for developing consensus and planning for the future.



## FOCUSED CONVERSATION NOTES BY PLANNING REGION

### WESTERN PLANNING REGION



#### Focused Conversation – Question 1

Each region approached planning differently to develop a comprehensive plan. What do you feel were the strengths and challenges for this region during the planning process?

#### Conversation Notes:

##### Strengths

- The entire region worked well together
- All partners were at the table
- Availability of data
- Culmination of robust input across many meetings
- Strength, Weakness, Opportunity, Threats (SWOT) – rural voice was heard
- Focus mindfully upon the end goal
- More resources and connections than previously anticipated

##### Challenges

- Geographic distance of planning region

### Focused Conversation – Question 2

Once the regional plans are approved, how will your region implement and sustain this plan of wealth creation for our state?

#### Conversation Notes:

- Meeting deadlines within the plan
- Collaboration and ownership by all partners
- Partners engaged and connected at meetings
- Break plan into priority areas so not overwhelming to partners and share successes
- Follow up regularly with partners

### Focused Conversation – Question 3

Think ahead four years from today, **AFTER** the plan is implemented. How will your customer approach be different than it is today?

#### Conversation Notes:

- **NO** wrong door & no one falls through the cracks
- More robust wraparound services
- Implement Career Pathways in NW part of the state
- More customers served
- More career focus
- Common intake/shared database
- Connect with partners outside of traditional work force systems and localize efforts

**Focused Conversation – Question 4**

Please think about the next four years. What are the steps needed for the Regional Plan to succeed?

**Conversation Notes:**

- Collaboration with work system partners and businesses
- Break the plan into smaller units and work on each unit
- Make pieces of the plan more understandable to partners outside of work force systems
- Inclusive
- Define success among partners
- Use taskforces
- Make it relevant
- Ask/Invite/Listen

**Focused Conversation – Question 5**

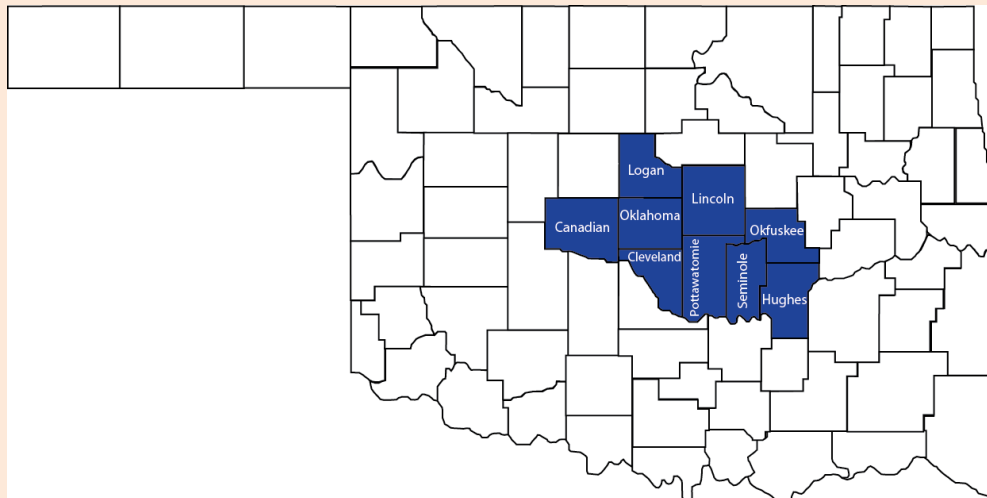
Please think about the next four years. Describe your vision of success for the Regional Plan.

**Conversation Notes:**

- Diversity of jobs
- Positive and constant communication
- Meet the needs of the customer: customers getting jobs; getting through the system; and getting out of the system
- Wealth creation
- Knowledge of available resources
- Closing the skills gap – more individuals certified and credentialed



## CENTRAL PLANNING REGION



### Focused Conversation – Question 1

Each region approached planning differently to develop a comprehensive plan. What you feel were the strengths and challenges for this region during the planning process?

#### Conversation Notes:

##### Strengths

- Current plan involves multiple agencies providing services
- Coordinated services
- Course/Program Diversity
- Services opened to more people

##### Challenges

- Access to services – program are unknown to end users
- Urban vs rural accessibility
- Spreading resource to areas not previously served

### Focused Conversation – Question 2

Once the regional plans are approved, how will your region implement and sustain this plan of wealth creation for our state?

#### Conversation Notes:

- Make services more localize
- Share vision or roles and responsibilities of funding, staff and services to prevent duplication
- A synergistic process among partners
- Share needs with partners – common goals and problems; resources and connection
- Be accountable to funding sources
- Communicate with the general population – business sector is not always aware of available services
- Maintain transparency and accountability
- Follow the plan that is place and make adjustments when necessary

### Focused Conversation – Question 3

Think ahead four years from today, **AFTER** the plan is implemented. How will your customer approach be different than it is today?

#### Conversation Notes:

- Better technology – paperless and electronic contact via e-mail
- Needs of the customer have been met
- Frontline staff that delivering services according to client needs
- Technology access to clients – providing computer access
- Addressing disabilities and language barriers
- Remaining customer centered by sharing available programs and employee training

**Focused Conversation – Question 4**

Please think about the next four years. What are the steps needed for the Regional Plan to succeed?

**Conversation Notes:**

- Effective communication with workforce system partners
- Partner buy-in and ability to navigate plans
- Increase client recruitment
- Sharing other program information with current students
- Career pathways – opportunities for students in common education, college and workers with 20+ years of career experience wanting or needing change
- Continue frontline conversation and take the time to share, explore, and explain options and resources
- Create a plan with a client

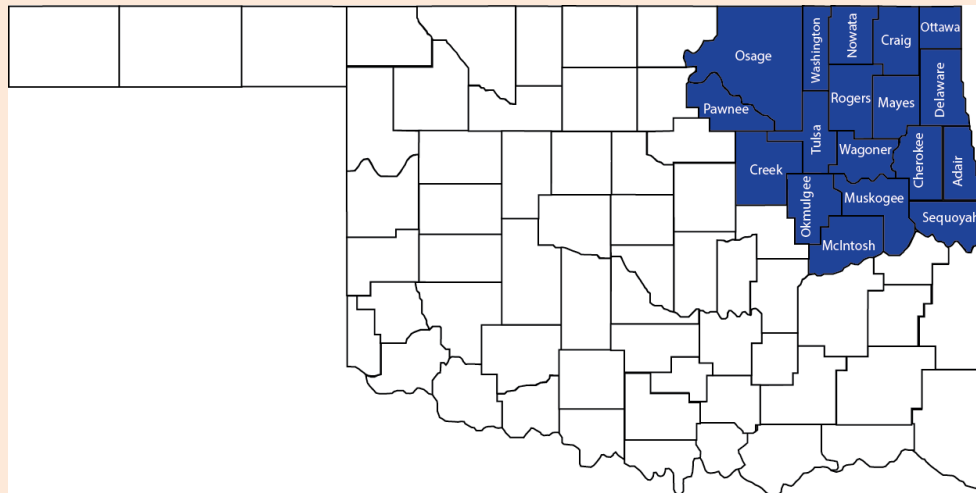
**Focused Conversation – Question 5**

Please think about the next four years. Describe your vision of success for the Regional Plan.

**Conversation Notes:**

- Fill in current gaps in services; determine the gaps that are not closed; and discover new gaps
- Improved productivity – more educated populous equals higher wages, healthier outcomes, etc.

## NORTHEAST PLANNING REGION



### Focused Conversation – Question 1

Each region approached planning differently to develop a comprehensive plan. What you feel were the strengths and challenges for this region during the planning process?

#### Conversation Notes:

##### Strengths

- Continuous planning
- Individual strengths and being able to collaborate together
- Resource alignment
- Identification of best practices and replication
- Regional database
- Regular meetings and networking system
- Identification of needs and strengths/weaknesses

##### Challenges

- No previous approach
- Customer did not have “one” place to go
- Wasted energy
- Lack of resources prior to plan
- Organizational development and territory boundaries
- Understanding who the clear leader is when collaborating

### Focused Conversation – Question 2

Once the regional plans are approved, how will your region implement and sustain this plan of wealth creation for our state?

#### Conversation Notes:

- Too early in the process to answer this question
- Commitment to the effort
- Accountability to the plan
- Consider the goal of the customer
- Partner engagement – people are always interested in helping and joining efforts
- Meetings on community engagement
- Must demonstrate value of series to foster relationships, meet their goals, accessibility and support
- Tribal partnerships

### Focused Conversation – Question 3

Think ahead four years from today, **AFTER** the plan is implemented. How will your customer approach be different than it is today?

#### Conversation Notes:

- Business and industry driven
- Define employment needs
- Clients will be served by the system
- Hub for needs to be met
- Operate as a consultant

#### Focused Conversation – Question 4

Please think about the next four years. What are the steps needed for the Regional Plan to succeed?

##### Conversation Notes:

- Sustainable wages for job seekers
- Assisting in training and education
- Framework that provides for sector strategies and career path goals
- Attend the meetings and know the partner to whom the client is referred
- Integrate systems
- Figure out where the limitations are for clients
- Manage limited resources with frontline people

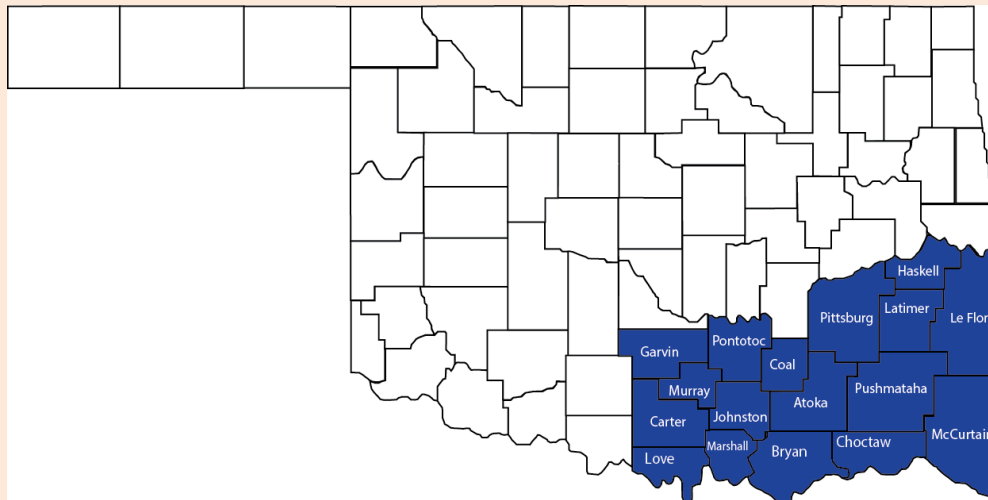
#### Focused Conversation – Question 5

Please think about the next four years. Describe your vision of success for the Regional Plan.

##### Conversation Notes:

- Sharing ideas
- Frontline staff having a voice
- Partner process to keep customers from falling through the cracks
- Use of a referral form and e-mail to ensure follow up
- Make certain that customer has a hard copy to help assist in the transition of working with other partners

## SOUTHEAST PLANNING REGION



### Focused Conversation – Question 1

Each region approached planning differently to develop a comprehensive plan. What you feel were the strengths and challenges for this region during the planning process?

#### Conversation Notes:

##### Strengths

- Good communication between partners
- Good leadership
- Planning ahead for the written plan, system certification and skill gaps

##### Challenges

- Budgets
- Common data accessibility
- System interface – make systems client friendly so that information is shared
- Awareness of existing or service or lack there of
- Standardization
- Staff shortages
- Large geographic areas

### Focused Conversation – Question 2

Once the regional plans are approved, how will your region implement and sustain this plan of wealth creation for our state?

#### Conversation Notes:

- Embrace and accept change despite role changes
- Read and know the basis of the plan
- Convey to leadership what is working
- Keep communicating
- Continue to collaborate with partners
- Work through challenges and issues with a s positive attitude – work to find a solutions
- Share information broadly with co-workers and their role related to the plan
- Promote and share plan across the state with internal and external partners
- Engage in community meetings where “we” live – know what each partner is doing and reach out to those that are not engaged but need to know or can help
- Share success stories
- Work together
- Call on your local community champions
- Commit to one on one person meeting – get to know each other and build relationships
- Avoid acronyms and be aware of subject matter language with students and clients
- Educate frontline staff

### Focused Conversation – Question 3

Think ahead four years from today, **AFTER** the plan is implemented. How will your customer approach be different than it is today?

#### Conversation Notes:

- Internet instead of fax
- Kiosks
- Enhance virtual experience – example web cameras
- Resource sharing
- Better referral system
- Systems must be interoperable



#### Focused Conversation – Question 4

Please think about the next four years. What are the steps needed for the Regional Plan to succeed?

##### Conversation Notes:

- Communication – talk to regional partners
- Understand that the plan will likely have modifications
- Public comment period is open weigh in on the plan

#### Focused Conversation – Question 5

Please think about the next four years. Describe your vision of success for the Regional Plan.

##### Conversation Notes:

- Better client interaction – one source that is used by everyone
- Persons with disabilities can access system
- Access for ALL who need it without out difficulties whether they are a client or not
- Make evaluation available in multiple formats especially for persons with disabilities (i.e. blind)
- Follow the regional plan and accept instruction or feedback from partners
- Make small changes
- Certification of McAlester Office

## CONCLUSION

The Oklahoma Works Conference Regional Roundtables and Facilitated Conversation provided a platform to learn new information; reflect on the planning process; anticipate needs and opportunities; and network among partners.

WIOA Regional Plans are to be implemented beginning July 1, 2017. Work system partners shared the need for continued and regular conversation as the regional plans are implemented and evaluated. Discussion topics for further potential exploration included:

- Identification of Leadership Within Core Partnerships
- Referral Process Outside of Regional Borders
- Identification of Skill Sets & Expertise of Partnership Staff
- Performance Tracking with Clients
- Communication with Provider Groups
- Integrated Intake System / Database
- Follow-Up with Clients
- Regular Information Sharing Across Partnerships

As stated through the Workforce Innovation Opportunity Act, “alignment of workforce development programs with regional economic development strategies is key to meet the needs of local and regional employers. Coordinated planning and service delivery strategies foster regional collaboration and ensure success.”

## REFERENCES

[Oklahoma Works](#)

[Office of Governor Mary Fallin](#)

[Workforce Opportunity and Reinvestment Act \(WIOA\)](#)

[Oklahoma State Department of Health, Office of Partner Engagement](#)

[Technology of Participation \(ToP\)](#)



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