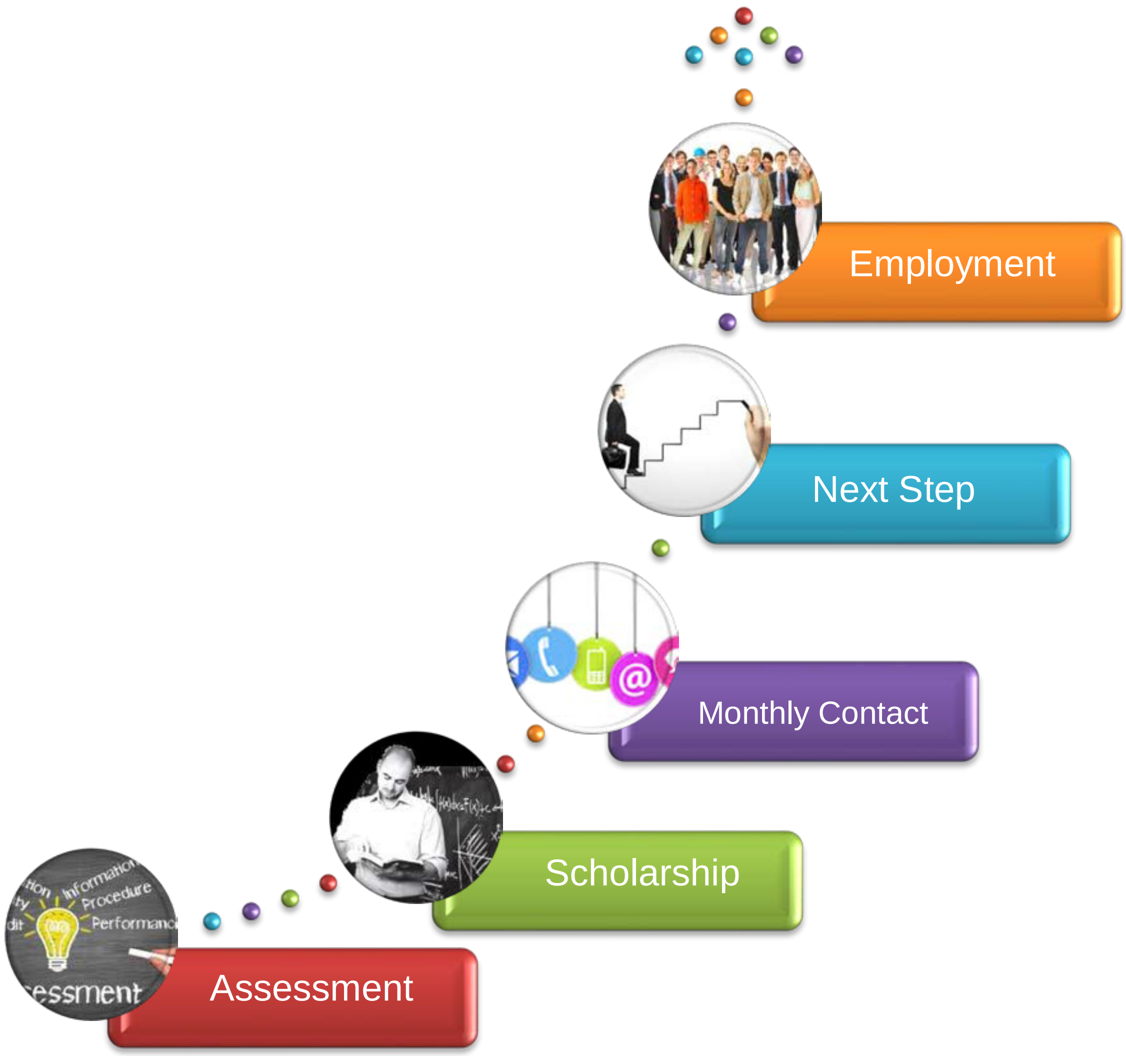
Touchpoint Management



We conduct thorough assessments with our customers to ensure we provide employers with qualified job candidates. Assessing helps us get to know the customer so we can provide professional advice. It helps us identify gaps in the skills, experience, and education a customer has compared to the skills, experience, and education the employer requires. A good assessment tells us what the customer is interested in, capable of doing and ready to do. It's an ongoing process that ensures we make good referrals to employers and help customers become self-sufficient. It's a critical skill that requires a serious approach. The following pages provide you with suggested questions, reminders, and guidelines to help grow your assessment skills.

Assessment

Initial Assessment

Use these questions to guide your conversation to collect background information about your customer and his/her occupational interest.

- ✓ What sparked your interest in wanting to pursue this training/occupation?
- ✓ What do you know about the occupation and the day-to-day activities of the job?
- ✓ How much do you expect to earn after completing the training? Will this lead you to becoming self-sufficient?
- ✓ Are you working now? How much do you earn? Tell me about your work history.
- ✓ Are you willing and able to work once your credential/certification is obtained?
- ✓ Are you attending school? What is your highest education achieved?
- ✓ Have you taken an occupational training in the past? Did you complete? If not, what happened?
- ✓ Have you taken all of the prerequisites needed for the training?
- ✓ Do you have transferrable skills in that area to successfully complete the training and obtain a job upon completion?
- ✓ Have you been accepted by the college or training provider?
- ✓ Have you applied for federal grants, scholarships, and other financial assistance?
- ✓ Do you understand that Workforce Solutions scholarships are limited to those who are unable to obtain financial assistance from other sources and will only be used as the last resort in funding? Explain to the customer.
- ✓ What is the total cost of the training? Are you aware that Workforce Solutions has a limit of $6,000 per 12-month period, up to two years? Explain to customer.

Use these questions to guide your conversation to determine your customer's suitability for training and Workforce Solutions' funding.

- ✓ Have you taken the TABE test or any required test, if applicable?
- ✓ Have you registered for Selective Service? (if male)
- ✓ What is the best way to contact you?
- ✓ Is your environment (living arrangements, child care, transportation, finances) conducive to succeeding in training for the entire time you will be in school? How will you support yourself while in school?
- ✓ What challenges do you have that may prevent you from completing your training?
- ✓ Do you have any background issues that may interfere with accepting a job offer in this occupation?
- ✓ How do you plan to get to and from school? Do you need transportation assistance?
- ✓ Are you willing to maintain contact with WS until you find employment?

- ✓ Do you agree to participate in all actions required by WS such as testing, providing your attendance, grades, credentials, etc.?
- ✓ When will school start? How many classes will you take and when do you expect to graduate? I need a copy of your degree plan – can you turn it in to me by ___?
- ✓ What specific degree or certificate will you receive?
- ✓ If you are awarded financial assistance for training, you will have to sign an award letter. Let's review it now to see if you agree to do everything it says and if you have any questions about what responsibilities you will have.
- ✓ Once you complete your training, you will need to submit to me a copy of your credential for your record.

Thinking Points…

- *If the customer took the TABE exam, do the scores reflect that he/she is ready to successfully complete the requested training? Did I discuss the scores with my customer?*
- *Did I look at O-net or High Skill Profiles to see what skills are needed for this occupation? Did I compare to the customer's skills? Did I discuss what this job entails with my customer? Am I able to identify transferrable skills?*
- *Did I determine if the customer was suitable for the training?*
- *Did I sufficiently cover support service needs?*
- *Did I review the degree plan with the customer and scan it to DocuWare?*
- *Did I submit the FA application and supporting documents only after initial assessment and suitability were determined?*
- *If the customer did not register for selective service, did he complete the self-certification form? Did I determine the reason to be acceptable?*
- *Did I record service 62: Initial Assessment under Onestop fund source?*

Scholarship

Comprehensive Assessment

After eligibility is determined use these questions to guide your conversation, either in person or by phone, to recap your customer's training plans and actions.

- ✓ Are you still ready to start training for ______ on dd/mm/yy (date)?
- ✓ Did you submit your cost obligation form or school information with costs?
- ✓ Is the total cost of your training more than $6,000? Do you have a plan to cover the outstanding amount?
- ✓ Did you submit your degree plan? Have we discussed it, including prerequisites and all classes/actions required to complete the training, such as required shots, certification tests, etc.?

- ✓ If the training will last longer than two years, have you secured funding to cover the full training?
- ✓ Do you still have transportation to get to and from classes? Offer assistance if the customer says he/she has transportation issues.
- ✓ I have your contact number as ___. Is this still the best number for me to reach you so that I can notify you when your voucher can be picked up? Update Intake Common information in TWIST.

Thinking Points…

- *Does the customer have an account in Gazelle? If not, did I create the account?*
- *Did I request the voucher?*
- *Did I complete/update the customer's service plan?*
- *Did I open services 8 – Comprehensive Objective Assessment and 68 – Employability Development Plan?*
- *Did I enter ITA information under Service Tracking for all planned semesters?*
- *Did I enter the expected graduation date in TWIST under Service Tracking/Optional Questions/Question #8 – Planned Training Completion Date – mm/dd/yyyy?*

Starting School - Within Three to Five Days of Start Date
Confirming the start date of class

Within three to five days of the start date of class, contact customer to find out if he/she started class.

- ✓ Once you have confirmed classes started, document in TWIST, using the subject line *"Training Start & Status"* and using the following block format:

Name of school: Lone Star College
Start Date: 08/29/2014
Address (Campus): Cy-Fair Location
9191 Barker Cypress Rd
Cypress, TX 77429
Phone: 281-290-3200
Type of degree or Certificate: Associates in Nursing
Total number of Credits/Modules: 12 semester credits
Expected Completion Date: Dec 15, 2014
Course Load: (list courses)
Enrollment Status: Full or Part-Time

- ✓ Please be specific when entering the type of degree or certificate. For example – Nursing, Welding are too vague. Instead, enter – Associates degree in Nursing, Registered Nurse, Licensed Vocational Nurse, Shielded Metal Arc Welding, Pipe Welding, etc.

If your customer only attended one day or a couple of days, include the following information in your TWIST note:

- ✓ Document how many days customer attended school and the reason for missing school. For example: "Ms. Davis attended school only one day because she found employment. Ms. Davis has officially dropped from school as of <u>dd/mm/yy</u> (date)."

If your customer did not start school, then document in TWIST why he/she did not start school.

- ✓ Use the subject line "Training Not Started": Ms. Davis did not start school on 01-08-2017 because the school cancelled classes, medical reasons, personal reasons, etc.
- ✓ Ask your customer when he/she will resume training. Document the information in your notes.
- ✓ If the voucher gets returned to the office, submit a FACS issue to change the start and end dates of the voucher.

Use the following questions to guide your conversation once you have confirmed that your customer started school and document in "Training Start & Status" counselor note.

- ✓ What day did you start school? How did you like it?
- ✓ Were you able to attend all of your classes completed in registration?
- ✓ Do you understand your class schedule and what days you are required to attend?
- ✓ Are you aware of the last date you can drop classes?
- ✓ Are you taking any classes outside of your curriculum? Let's discuss how that may affect your WS scholarship.
- ✓ Were you able to get all of the books and supplies you need for class?
- ✓ What class do you think you will like the best? Which class(es) do you think will be the hardest?
- ✓ Do you have blank attendance sheets since you'll need to provide them to me?
- ✓ Let me know if you are unable to attend a class or are having trouble with a class or teacher.

Thinking Points…

- *Did I discuss how, how often, and when the customer needs to submit attendance sheets?*
- *Did I complete Enrolled in Post-Secondary under Performance Outcomes, if it applies to the customer? Did I update Intake Common?*
- *Did I follow up to determine if the customer received his/her Pell grant, if applicable?*
- *Did I enter the appropriate Training Start & Status note in TWIST and all of the required information?*

Monthly Contact

The following questions can be used to maintain monthly contact with your customer. After reviewing last month's conversation, update any new information.

- ✓ How do you like your classes? What about your teachers?
- ✓ How are your grades?
- ✓ Are you having any trouble with any of your classes? Does your school have tutoring?
- ✓ What is your favorite class and what do you like about it?
- ✓ How did you do on your tests? What are the highest and lowest test scores you received this month?
- ✓ Did you turn in your attendance sheets? Have you missed any days?
- ✓ Is there anything that you need to successfully continue your training?
- ✓ Are you aware that you must successfully pass each semester to be eligible for funding in the future, i.e. next semester, next year, etc.?

Thinking Points…

- *Did I update Intake Common if the customer had any changes?*
- *Did I provide resources as needed? Did I document it in counselor notes?*
- *Did I check to see if anything needs to be submitted or if new information needs to be documented?*
- *Did I read enough of the previous counselor notes to understand the customer's current situation?*

Next Step

When the customer has completed a portion of the training such as a semester, use these questions to guide your conservation.

Semester Completion

- ✓ How were your grades?
- ✓ What's your current GPA?
- ✓ Are you still on track to graduate in _____?
- ✓ Did you drop or fail any classes?
- ✓ Have you submitted your unofficial transcript or grades? I'll need them to authorize continued financial assistance.
- ✓ Has your degree plan changed?
- ✓ When does the new semester start?
- ✓ What will you be needing?

When the customer has completed the training, use these questions to guide your conservation.

Training Completion

- ✓ Do you know which employers are hiring in your field?
- ✓ Have you contacted any employers? If so, tell me about what happened.
- ✓ Has the school offered job placement services?
- ✓ Have any employers visited the school to speak with students about job openings/outlook?
- ✓ Do you have a resume?
- ✓ I am going to help you practice interviewing and refer you to seminars to help you find a job.
- ✓ I am going to help you research employers and job openings and provide you with job leads/referrals. I will need you to follow up with me weekly or biweekly on your progress.

Employment

Use these questions to guide your conversation after the customer completes the training and obtains the credential:

- ✓ Congratulations on the completion of ___. That's quite an accomplishment. How do you feel?
- ✓ Did you update your work application to show you now have a credential in ___ ?
- ✓ Please provide me with a copy of your credential – I'd like to put it in your file to show that you were successful and accomplished your goals.

- ✓ I have some job leads for you.
- ✓ Let me tell you about our hiring events.
- ✓ I can’t wait to hear where you’ve gotten employed – can you call me as soon as you receive a job offer? I may be able to help you get started on your new job.
- ✓ I’d like you to come in or call biweekly until you get employed, so we can see if you need to change your job search methods.

Thinking Points…

- *If not employed, did I assist the customer with updating his resume, providing referrals, etc.? Did I key all services provided in WIT?*
- *Did I discuss interviewing and provide a calendar showing which workshops were available?*
- *Did I provide professional advice?*
- *If employed, did I check to see if the customer had everything he/she needed in terms of transportation, support services, etc. to keep his/her job?*
- *Did I let the customer know that he/she could continue to contact me if any employment related questions come up?*
- *Did I document what we discussed and the service provided in counselor notes?*
- *Did I update Service Tracking and the service plan in TWIST?*
- *Did I check to see if anything needs to be submitted or if new information needs to be documented?*
- *Did I read enough of the previous counselor notes to understand the customer’s current situation?*