

Worknet Leadership Team
Merced County Office of Education-Clark Room
632 W. 13th Street, Merced, CA
January 10,2006, 1:30- 4:00pm
Feedback Report Consensus Workshop

Members Present: Stephanie Busbea, Rick Bungcayao, Natalie Culver, Debbie Glass, Pamela Goza, Heidi Hall, Maggie Mann, Holly Newlon, Terry Nichols, Joanne Presnell, Alfonse Peterson, Pedro Vargas

Staff Present: Bernedette Castaneda, Jaime Doradea, Elza Maldonado, Helen Dunbar, Stacey Jorgenson, Lexie Jane Melin, Julie Odell, Eve Snelling, Jeib Thianpimmai

Facilitator: Sandy Lemas

This workshop was held for the Worknet Leadership Team members and staff to address and prioritize the Strengths and the Opportunities for Improvement in the Worknet Employment Resource Center Feedback Report.

Rational Aim: Prioritize where to begin (and develop time lines)

Experiential Aim: Agree and work together on the opportunities for improvement and areas of strength.

Workshop question: What are the most important areas in the seven categories that will have the most impact for improving services and productivity?

- 1) Leadership
- 2) Strategic Planning
- 3) Customer and Market Focus
- 4) Information and Analysis
- 5) Human Resource Focus
- 6) Process Management
- 7) Business Results

What strengths do we still want to work on?

What are the two most important opportunities for improvement?

Each category was addressed and discussed separately. The workshop participants were asked to identify two strengths and two opportunities for improvement individually and then in groups of three to four. The strengths were posted in yellow paper and the opportunities were posted in blue paper for each of the seven categories. The summary of criteria is listed for each category. Cross-references have been made for each strength and opportunities for improvement section. The numbers following a Strength or OFI indicate the number of comments that were the same as others that were posted. The results are as follows:

I. Leadership (150 points)

The *Leadership* Category examines how your organization's senior leaders address values, directions, and performance expectations, as well as a focus on customers and other stakeholders, empowerment, innovation, and learning. Also examined is how your organization addresses its responsibilities to the public and supports its key communities.

1.a. (20) Clear direction (consistent) (mission)

There exists a clear, well articulated Mission Statement for the organization

1.b. (20) Quality One-Stop Staff (continuous learning)

A formal education/employee development plan exists

If certification is required for certain employee groups, those certifications exist and are current

1.c. (20) The "right" organization and a well defined organization

There is an organizational chart

The organizational structure is appropriate for the organization

All leadership positions are filled

1.d. (25) Customer focus

There is an understanding/definition of the customer(s)

A customer service training program exists

1.e. (25) Focus on collaboration

All of the mandatory partners participate in the One-Stop on a regular basis

The rate of cross-referral among the partners is satisfactory relative to benchmark organizations

The degree of information sharing among One-Stop partners is adequate

1.f. (25) Support for continuous quality improvement

A well defined CQI plan and program exists

Staff are trained in the principles of CQI

There is a commitment of employee time to the CQI process

1.g. (15) Supplier certification

Key performance factors are used in the evaluation of suppliers and

Partners

Strengths

Staff certified (workforce development) -1.b

- Continue providing opportunity for training and certification such as Dynamic Work Institute for staff to better assist customers (2).

Well-defined organization chart- 1.c

- Well-defined organizations chart (2)

Customer Service Training- 1.d

- Information techniques of customer service to diverse customer clientele
- Customer service training opportunities. Quality one-stop staff (4)
- Staff co-located at the ERC has the skills required to perform the jobs

Customer Feedback -1.d and 1.e

- Effective collaboration with partners and suppliers (1)
- Continue getting feedback from customers to better assist them through collaboration (2)

Using performance factors to evaluate-1.g

Opportunities for Improvement

Cross-referral-1.a

- Need to identify if cross-referrals with partners is rated a satisfactory process or not (4)

Collaboration with partners improving the tracking system 1.e

Partners Satisfaction Rates-1.f

- Survey partners for satisfaction of services to common customers (1)

Continuous Quality Improvement Plan-1.f

- Develop a continuous quality improvement plan (4)

Measurable outcomes of training-1.g

- Link staff learning to WDP certificated performance expectations (6)

II. Strategic Planning (100 points)

The *Strategic Planning* Category examines how your organization develops strategic objectives and action plans. Also examined are how your chosen strategic objectives and action plans are deployed and how progress is measured.

Issues to Address in your Challenger Application:

2.a. (15) Well defined

There exists a well-defined strategic plan with measurable objectives

2.b. (15) Involvement of all constituents

Stakeholders possess knowledge of the elements of the strategic plan

There is documented evidence that all levels of the organization and all stakeholders participated in the development of the strategic plan

2.c. (15) Customer focus (needs - now and in the future)

A formal customer needs assessment has been performed

The results of the needs assessment are addressed in the strategic plan

2.d. (15) Define metrics (are they measured)

Outcomes and a method to measure them are identified in the plan

Milestones exist for achievement of outcomes

2.e. (15) Implemented (organizational behavior)

There is evidence that the strategic plan is being implemented in the organization

2.f. (10) Consistent with available resources

The organization has sufficient resources to implement the plan

2.g. (15) Includes continuous quality improvement plan

The strategic plan includes an emphasis on CQI

Strengths

Cross-functional-2.b

- Using cross-functional work groups to address Opportunities for Improvements and strengths (1).

Collaboration Strategic Planning-2.b

- Include stake holders, partners, management, and staff in strategic planning process (9)
- Continue the strategic planning process from all levels of organizations to ensure well-rounded input and ownership/accountability and update plan.

Customer Satisfaction-2.c

- Continue to collect customer satisfaction data to include business and act on it (5)

Business and Customer comparison-2.c

- Data Collection: compare data from business to what job seekers request for business 1st approach.

Business Data-2.c

- Business services unit-collecting data from business customers.
- Collect data from business customers

Opportunities for Improvement

Funding-2.b

- Create an action plan for Worknet to address strategic challenges (budget cuts) (9)

Scorecard-2.e

- Provide clear and measurable link on how staff/partners' staff daily services are meeting strategic goals and objective (6).
- Show how scorecard is implemented (1)

III. Customer and Market Focus (200 points)

The *Customer and Market Focus* Category examines how your organization determines requirements, expectations, and preferences of customers and markets. Also examined is how your organization builds relationships with customers and determines the key factors that lead to customer acquisition, satisfaction, and retention; and, to business expansion

3.a. (50) Customer needs surveyed

There is evidence that customer needs have been surveyed/identified

3.b. (50) Customer satisfaction

Customer satisfaction is satisfactory relative to benchmark organizations

Customer satisfaction demonstrates improvement over time

Internal organizational goals are established and achieved

3.c. (50) Results linked to strategic plan and continuous improvement

Customer Satisfaction surveys result in actions taken through strategic planning

3.d. (50) Single point of contact for clients and employers

There is evidence that all core services from all partners are available at the One-Stop

Strengths

Customer Needs-3.a

- Responding to the customer/job seekers needs (2).

Examine Expectations-3.b

Action steps on business survey: Provide more opportunity for basic education-3.c.

Universal Services-3.d

- Ensure “No Wrong Door, Single Point of Contact” approach is used by all staff and partners (7).
- Assistive technology and services for the disabled
- Collaborative grant writing (1)

Opportunities for Improvement

Outreach-3.a

- Develop clear process to determine whether outreach activities are appropriate and producing desired results (6).

Training to equitably serve the disabled-3.a

Marketing Strategy and Results-3.a

- Expand methods of reaching community.
- Evaluate marketing plan against results (4)

How is customer feedback used? (1)-3.c

Data to Determine Results-3.c

- Identify key factors that lead to customer acquisition, retention, and business expansion- (2)

Technology-3.d

- Additional focus: more core service on-line

Synergy of Resources-3.d

IV. Information and Analysis (100)

The *Information and Analysis* Category examines your organization's information management and performance measurement systems; and, how your organization analyzes performance data and information

4.a. (25) Information system supports continuous improvement

Existing systems adequately collect data

4.b. (25) Continuous improvement linked to data collection

The collected data is linked to CQI efforts

4.c. (25) Resource Center offers: information in multiple mediums; self-service; Internet access, trained staff, etc.

The above exists and is readily available to clients

4.d. (25) Strategy for meeting state and local MIS needs (management reporting)

Strengths

Operational Improvements Based on Data-4.b

- Continue to collect customer data for improved services, customer satisfaction, and cross training purposes (5)

Multiple Mediums-4.c

- Providing multiple mediums for services to job seekers & business community (4)

Accountability of Program (1)-4.d

Opportunities for Improvement

Improvement cycle-4.b

- Develop cycles of improvement in areas of strengths (5)
- Be more of a proactive business (1)

Evidence COI Transferred and Implemented-4.b

Affiliate Sites-4.c

- Coordinate policies and procedures plus processes with affiliate sites
- Process to ensure improvements in affiliated sites (2)
- Affiliate site reporting and implementation (1)

V. Human Resource Management (150 points)

The *Human Resource Focus* Category examines how your organization motivates and enables employees to develop and utilize their full potential in alignment with your organization's overall objectives and action plans. Also, examined are the organization's efforts to build and maintain a work environment and an employee support climate conducive to performance excellence, and to personal and organizational growth.

Issues to Address in your Challenger Award Application:

5.a. (30) Staff is competent

Job descriptions exist for all positions
Employees are evaluated against the requirements of the job descriptions
Employee evaluations demonstrate that employees are competent and meeting job requirements

5.b. (30) Continuous learning

Employees have an individual development plan that has been implemented
There is an organization-wide employee development plan that has been implemented
There is a vehicle for making employees aware of available training

5.c. (30) Team orientation

There are regular meetings to disseminate information and discuss important business issues
There are multidisciplinary cross-functional teams to work on performance improvement initiatives

5.d. (30) Uniform application of human resources policies

Results of employee satisfaction surveys demonstrate uniform application of policies
A formal grievance process exists
Grievances are not excessive given the size of the organization

5.e. (30) Employee expectations well defined

Policies and procedures are disseminated throughout the organization
All new employees get an orientation to the organization

Strengths

Staff Development-5.a, 5.b

- Staff and partner orientations
- Ensuring a competent workforce amongst staff
- Continue professional growth thru training, coaching and mentoring (3)
- National certification (2)

Information Dissemination-5.c, 5.e

- Ensure information re: policies and procedures are disseminated to all staff and partners
- Dissemination of information to partners/new staff
- Continue regular meeting to discuss business issue
- Monthly staff/partner meetings

Opportunities for Improvement

Employee Development Plan (EDP)-5.b

- Center-wide EDP
- EDP for all WI staff
- Align EDPs with objective actions plans
- Optional EDP

Define and develop clear grievance process for customers-5.d

Determine excessive grievances-5.d

- Determine what would constitute an excessive number of grievances (7)

VI. Process Management (100)

The *Process Management* Category examines the key aspects of your organization's process management, including customer-focused design, product/service delivery, key business, and support processes

6.a. (25) Uniform application of policies and procedures

Policies and procedures are disseminated throughout the organization

All new employees get an orientation to the organization

6.b. (25) Feedback mechanism

An adequate feedback mechanism exists

6.c. (25) Service recovery

There is a formal policy/mechanism for complaint management

Examination of a sample of complaints indicates that the policy is being implemented

6.d. (25) Staff-empowerment

Decisions can be made at various levels within the organization

There is an organizational assessment to determine if the degree of empowerment is appropriate/working

Strengths

Orientation-6.a

- Continue orientations for employees (new) and partner staff (4)
- Supervisors work with new employees

Feedback Mechanism-6.b

- Feedback mechanism that supports commitment to EXCELLENCE and CQI (5)

Mechanism for Complaints-6.c

- Mechanism for handling customer complaints and dealing with grievances (3)

Opportunities for Improvement

Supervisors' check off list to ensure covering training topics for new employees-6.a

Staff satisfaction survey-6b

Staff Empowerment-6.d

- Process to determine if the degree of empowerment is appropriate and working needs to be demonstrated (6)

Assess staff-6.d

- Develop process to assess staff (3)

VII. Business Results (200 points)

The *Business Results* Category examines your organization’s performance and improvement in key business areas – customer satisfaction, product and service performance, financial and marketplace performance, human resource results, and operational performance. Also examined are performance levels relative to those of your competitors.

Editor’s Note: Please focus your responses to the following questions by citing specific Results you have achieved. Charts and graphs are encouraged to summarize your Results. Avoid anecdotal responses that cannot be validated by numerical data.

Issues to Address in your Challenger Award Application:

7.a. (100) Customer and community awareness

- There is an awareness of One-Stop based on random survey of community
- There is an organizational effort to raise awareness
- Resources are devoted to marketing/PR
- Marketing/PR addresses both supply and demand
- Marketing plan exists and results are evaluated against plan

7.b. (100) Demonstrated and measurable

- Financial performance
- A budget exists and performance suggests that the organization is
- Operating within budget and significant variances have been
- Adequately explained
- Costs are benchmarked (and compare favorably) against other
- Workforce investment areas
- Operational performance
- Objectives in the strategic plan are achieved
- Customer Satisfaction
- See “Customer and Market Focus”

Strengths

Community Awareness-7.a

- Responsiveness to the needs of the business community
- Continue to raise community awareness of center’s services (4)

Audit Reports-7.b

- No variances in audit reports or fiscal performance (1)

Ethical Behavior-7.b

- Dedication to ethical behavior and integrity (2)
-

Customer Satisfaction-7.b

- High customer satisfaction ratings (2)
- Providing excellent customer service

Opportunities for Improvement

Awareness-7.a

- Raise awareness about its services in the community
- Data from raising awareness of services from campaign was not available (7)