Fresno Regional Workforce Investment Board

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POLICY BULLETIN

FRWIB PB # 02-10 Date Released: September 23, 2010

To: All Fresno Regional Workforce Investment Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: September 23, 2010

Subject: Customer Management

This Policy Bulletin (PB) defines, at a high level, how customer flow management will be handled by all providers of services. For the purpose of this PB, "customer flow management" applies to all one stop and intensive sub-contracted providers, all training providers (non-wia and WIA funded training), and any other provider of services who may have direct job seeker, youth or employer contact.

Specific Fresno Regional Workforce Investment Board (FRWIB) direction will be communicated via Operational Directives and Information Bulletins, as deemed appropriate.

Overall Policy Guidance

1. Client Management
   Once a job seeker or youth is enrolled into WIA, they will be assigned a primary point of contact: Adult - Employment Readiness Specialist (ERS); Youth - Academic & Career Advisor (ACA). This staff person becomes the client's primary point of contact. This staff person is fully responsible and accountable for the success of their client in their WIA program. This requires the development of a good working relationship with the client, where open communication and trust is required.

   In order to foster this environment, a provider cannot transfer a client to another staff person as a result of the job seeker's movement within the customer flow. FRWIB staff acknowleges that additional skills or staff may be needed to assist the primary contact person, in order to assure a job seeker's success. In this event, the primary contact person is still responsible and must remain engaged with the client during this time of assistance.

   In the event there are irreconcilable differences between client and primary point of contact, the management team is to review the issues and causes and take appropriate action. Transferring a client between staff should only happen as a last resort action.

   In the event that a client has an issue, concern or complaint concerning their program, the primary contact is responsible for aggressively resolving the problem. If the primary contact person can not resolve the problem, then s/he is to escalate the issue per the escalation process below.

In the event a training provider, Employer, or Business Account Specialist (BAS) is experienceing difficulties with a client, they are to communicate the problem with the client's single point of contact. The single point of contact will meet with the client as quickly as possible to fully understand the cause of the issue and to develop a corrective action or counseling plan. If the primary contact person can not resolve the problem, then s/he is to escalate the issue per the escalation process below.

In the event the problem can not be resolved, the client may be exited from the activity they are enrolled in and may be exited from WIA.

Escalation Time Line and Process

The primary point of contact has until 5pm of the following business day to resolve the issue. If s/he cannot resolve the issue within this timeframe, they are to escalate the issue to their management team for resolution.

The management team has 3 business days to resolve the issue. If they can not resolve the issue within this timeframe, they are to escalate the issue to the FRWIB Program Manager and Assistant Director.

During this escalation phase, the primary contact person is still responsible to ensure that the problem is being worked aggressively and keep in contact with their client.

2. Training Providers
   In the event that a One-Stop, Intensive and/or Youth, provider of services is also a contracted training provider, the provider of services/training provider is required to implement processes that maintain a firewall, as if the provider of services and the training provider were separate organizations. This is to ensure that staff for both operations maintain their objectivity and clarity of communication between themselves and their separate roles with the client. Training provider staff is not to represent themselves to WIA students, as Workforce Connection staff for whom they are not the primary contact person.

   In the event that a WIA student is encountering difficulties in their training activities or is non-compliant with WIA or Training provider policies and procedures, training provider staff is to immediately notify the student's primary contact person. The primary contact person is to follow the Escalation timeline and process defined above.

3. Employers
   Employer Issues - Any issues concerning employers or providing business services to employers is to be aggressively addressed by the BAS. If the BAS can not resolve the issue, they are to follow the Escalation timeline and process defined above.

   Client Issues - In the event the problem involves a WIA client, the BAS is to immediately notify the client's single point of contact. They will work together aggressively to resolve the problem. In the event they are unable to resolve the problem they are to follow the Escalation timeline and process defined above. The BAS is to communicate status to the employer.

Documentation Requirements
All issues, actions taken and status is to be documented in client file case notes. Any agreements made between parties are to be also documented in email, if available. If not available the single point of contact is to document this in a letter sent to the parties.

If any questions, please contact the FRWIB Program manager.