

EO Officer Training Meeting Agenda**February 21 – 22, 2018****8:30 a.m. – 4:30 p.m.****Location: Pacific Mountain WDC**John Loyle Conference Room – 3rd floor

1570 Irving Street SW

Tumwater, WA 98512

Day One: Wednesday, February 21

<u>Time</u>	<u>Topic</u>	<u>Presenter/Lead</u>
8:30 – 9:00	Welcome and Opening Remarks Welcome to Pac Mountain & the Importance of Equal Opportunity Welcome and Thank You	Cheryl Fambles , Director Pac Mountain WDC Teresa Eckstein , State-Level EO Officer
9:00 – 9:30	Intros and Overview <ul style="list-style-type: none"> • Introductions • Review agenda 	Megan & Kelly
9:30 – 10:00	EO & Nondiscrimination Regulation Updates	Kelly
10:00 – 10:30	State-Level EO Monitoring	Megan
10:30 – 10:45	Break	
10:45 – 12:00	Discrimination Complaint Processing	Teresa
12:00 – 12:45	Lunch	
12:45 – 1:30	WorkSource Thurston Overview and Tour	Steve Perry , One Stop Operator Pac Mntn Norton Sweet , WS Administrator
1:30 – 2:00	Break	
2:00 – 4:30	The Safe Zone – Understanding LGBTQ Issues in the Workplace	James Trujillo , Talent Acquisition Manager, ESD

EO Officer Training Meeting Agenda – Day Two

Day Two: Thursday, February 22

<u>Time</u>	<u>Topic</u>	<u>Presenter/Lead</u>
8:30 – 9:30	Accessible Technology Presentation	Ryan Leisinger , Accessibility Champion WaTech
9:30 – 10:30	Accessible Services Case Studies	Toby Olson , Exec Sec GCDE Hillary Rossi , DEI Grant Coordinator
10:30 – 10:45	Break	
10:45 – 12:15	ESD Leadership Panel – Updates and Q&A	Dale Peinecke , Commissioner Tim Probst , WF Development & Strategic Initiatives Janelle Guthrie , Communications Julie Lord , UI Scott Wheeler , WITS Kelly Lindseth , Employment Connections
12:15 – 1:00	Lunch	
1:00 – 2:30	Workgroups <ul style="list-style-type: none"> • EO training • Monitoring tools • EO complaint policy and handbook <p>Workgroups report out/review work/consensus</p>	All
2:30 – 2:45	Break	
2:45 – 4:00	Roundtable/discussion – come prepared to talk about your area – issues, successes, questions for each other	All
4:00 – 4:30	Questions, wrap up, next meeting input	All

EO Officer Meeting Agenda

November 5, 2018

1:00 p.m. – 5:00 p.m.

Location: Doubletree Hotel by Hilton, Seatac

Room: Cascade 10, Second Floor

18740 Pacific Highway South

Seattle, WA 98188

<u>Time</u>	<u>Topic</u>	<u>Presenter/Lead</u>
1:00 – 1:15	Welcome, Introductions, Agenda Review	Teresa Eckstein
1:15 – 2:15	Review Updates <ul style="list-style-type: none">• EO Training• Monitoring Guide• 2019 EO Monitoring Calendar	Teresa Eckstein and Megan Eason
2:15 – 2:45	Outreach Discussion	Dawn Karber, Amy Gimlin & Craig Clark
2:45 – 3:00	Break	All
3:00 – 3:30	MS Windows 7 Accessibility Features	Eric Lee
3:30 – 4:00	Video Relay Demo	Teresa Eckstein
4:00 – 4:30	Case Notes Discussion	Cameron Cassidy, Malinda Bjaaland & Cynthia Garcia
4:15 – 5:00	Roundtable, questions, wrap up	All

**EO Officer In-person Meeting
Agenda
May 22 – 23, 2019**

Location: South Central Workforce Council
1205 Ahtanum Ridge Dr., Suite B
Union Gap, WA 98903

Day One: Wednesday, May 22 – 8:30 a.m.–5:00 p.m.

<u><i>Time</i></u>	<u><i>Topic</i></u>	<u><i>Presenter/Lead</i></u>
8:30 – 9:00	<p>Welcome and Opening Remarks</p> <p>Welcome to South Central Workforce Council</p> <p>Welcome from ESD</p> <p><u>Welcome video from Commissioner Suzi Levine</u></p>	<p>Jack Fitzgerald, Director S. Central WDC</p> <p>Amy Garcia-Hernandez, EO Officer</p> <p>Teresa Eckstein, State- Level EO Officer</p> <p>Cami Feek, Deputy Commissioner</p>
9:00 – 9:30	<p>Intros and Overview</p> <ul style="list-style-type: none"> • Introductions • Ice breaker • Review agenda 	Clarence Massey
9:30 – 10:00	Chat & Questions with ESD Deputy Commissioner	Cami Feek
10:00 – 10:15	Break	All
10:15 - 12:00	New EO Training Review	Teresa Eckstein and Megan Eason
12:00 - 12:45	Lunch	All
12:45 – 1:30	Tour WorkSource Yakima	WS Yakima Staff
1:30 – 2:45	<p>WA State Human Rights Commission Presentation – Topic</p> <ul style="list-style-type: none"> • Updates to law and current trends • Q&A about service animals • Other public accommodations 	Juanita Soto , Investigator, HRC
2:45 – 3:00	Break	All
3:00 – 3:30	Nondiscrimination Plan Review	Teresa Eckstein, Megan Eason, and Clarence Massey
3:30 – 5:00	Roundtable/discussion – come prepared to talk about your area – issues, successes, questions for each other	All

EO Officer In-person Meeting Agenda – Day Two

Day Two: Thursday, May 23 – 8:30 a.m.–3:00 p.m.

<u><i>Time</i></u>	<u><i>Topic</i></u>	<u><i>Presenter/Lead</i></u>
8:30 - 8:45	EO Activity	All
8:45 – 10:00	Phoenix - EO Business Requirements	Anne Goranson ; System Alignment Liaison Christa Castanon ; WorkSource/Other IT Systems Manager
10:00 – 10:15	Break	All
10:15 - 12:15	Discussions <ul style="list-style-type: none"> • Complaint Handbook • Complaint Process • Forms to translate to Spanish • Language Assistance • Case Notes/Medical Files 	All
12:15 - 1:00	Lunch	All
1:00 – 2:00	Serving customers who are blind/low vision	Karla Jessen, DSB Brooke Davis, DSB
2:00 – 2:45	Questions, wrap up, next meeting planning	All
2:45 – 3:00	Meeting Debrief (Plus/Delta)	Clarence Massey

EO Officer Meeting Agenda
October 28, 2019
10:00 a.m. – 4:30 p.m.

Location: Doubletree Hotel by Hilton, SeaTac

Room: Cascade 7-8

18740 Pacific Highway South

Seattle, WA 98188

<u><i>Time</i></u>	<u><i>Topic</i></u>	<u><i>Presenter/Lead</i></u>
10:00 – 10:15	Welcome, Introductions, Agenda Review	Teresa Eckstein
10:15 – 11:15	Gender Identity: <ul style="list-style-type: none"> • Train the Trainer – on slides from EO training • FAQs 	Teresa Eckstein
11:15 – 12:00	Monitoring Levels - Connection sites, Affiliate sites, One-Stops 2020 State EO Monitoring Calendar	All
12:00 – 1:00	Lunch (on your own)	All
1:00 – 2:00	Assistive Technology – Department of Services for the Blind	Yang-su Cho
2:00 – 3:30	Roundtable, updates from areas, questions	All
3:30 – 4:30	ESD Updates, Questions & Discussion	Cami Feek

EO & Nondiscrimination Regulation Updates

29 CFR Part 38

Alignment with current case law

- ▶ Developments since 1999 under the following laws, reflected in case law and in regulations issued by other Federal agencies:
 - ▶ Title VI and VII of the Civil Rights Act of 1964
 - ▶ Title IX of the Education Amendments of 1972
 - ▶ The Americans with Disabilities Act of 1990 and the ADA Amendments Act of 2008
 - ▶ Section 504 of the Rehabilitation Act of 1973

Discrimination based on pregnancy

- ▶ Sex discrimination now includes discrimination based on pregnancy, childbirth, and related medical conditions:
 - ▶ Pregnancy Discrimination Act of 1978, which amended Title VII of the Civil Rights Act of 1964
 - ▶ Title IX of the Education Amendments of 1972

Transgender & Gender Non-Conforming

- ▶ Sex discrimination now includes discrimination on the basis of:
 - ▶ Transgender status
 - ▶ Gender identity
 - ▶ Sex stereotyping
 - ▶ Sexual orientation

Limited English proficiency (LEP)

- ▶ Expands safeguards for meaningful access
- ▶ National origin discrimination includes LEP
- ▶ Meaningful access to aid, benefits, services, and training
- ▶ “Vital” documents
- ▶ Recording the LEP and preferred language of applicants
- ▶ Appendix added to the LEP section of the rule

Responsibilities and Rights

- ▶ EO notice and poster revised:
 - ▶ Sex - includes pregnancy, childbirth, and related medical conditions; and transgender status, gender identity, and sex stereotyping
 - ▶ National origin – includes limited English proficiency
- ▶ Tagline:
 - ▶ (Name) is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Washington Relay Service 711.

EO Officer Roles

- ▶ State-Level EO Officer must report to the Governor or their designee
- ▶ ESD must designate an EO Officer
- ▶ EO Officers must have the staff and resources necessary to complete their duties

Annual Monitoring

- ▶ All service providers and all sites will be monitored annually by the Local EO Officers
- ▶ The State-Level EO Officer will do a monitoring review of each WDC annually

Other updates

- ▶ What used to be called '**Universal Access**' is now called '**Affirmative Outreach**' in the new rule
- ▶ '**Methods of Administration**' will be called '**Nondiscrimination Plan**' once submitted to CRC at the end of 2018



STATE-LEVEL EO MONITORING

MONITORING FOR COMPLIANCE

- The Local EO Officer monitors WorkSource centers and service providers for compliance with the EO and nondiscrimination requirements.
- The State-Level EO Officer reviews the WDC monitoring.

ENTRANCE MEETING

- Held with the Executive Director and Local EO Officer
- Discuss successes, challenges, and questions
- Review agenda and monitoring plan for our visit

FACILITY WALKTHROUGH

- Parking Lot
- Pathway to the entrance of the building
- Accessible workstation
- Front desk/resource room
- Brochures and pamphlets

FACILITY WALKTHROUGH CONTINUED

- EO Notice Posters
- Training rooms
- Aisles
- Bathrooms
- Door pressure

WE BELIEVE IN EQUAL OPPORTUNITY

Equal opportunity is the law
It is against the law for the recipient of Federal financial assistance to discriminate on the following bases: Against any individual in the United States, on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions), age (excepting bona fide seniority plans), and genetic information; against any individual on the basis of disability; or against any individual on the basis of national origin, ancestry, or political affiliation or belief; or against any beneficiary of, applicant to, or participant in a program financially assisted under Title of the Workforce Investment and Opportunity Act, on the basis of the individual's citizenship status or participation in any WIOA Title I financially assisted program or activity.

The recipient must not discriminate in any of the following areas:
Deciding who will be selected, or have access, to any WIOA Title I financially assisted program or activity; providing opportunities to, or treating any person with respect to, such a program or activity; or making employment decisions in the administration of, or in connection with, such a program or activity.

Recipients of Federal financial assistance must take reasonable steps to ensure that communications with individuals with disabilities are as effective as communications with others. This means that upon request and where needed the individual, recipients are responsible to provide appropriate auxiliary aids and services to qualified individuals with disabilities.

What to do if you believe you have experienced discrimination
If you think that you have been subjected to discrimination under a WIOA Title I financially assisted program or activity, you may file a complaint within 180 days from the date of the alleged incident with either The recipient's Equal Opportunity Office (or the program when the recipient has designated for this purpose), or

The Director, Civil Rights Center (CRC)
U.S. Department of Labor
300 Constitution Avenue, NW
Room 70-4132
Washington, DC 20210

It is absolutely an absolute on the CRC Web site at www.dol.gov.

If you file your complaint with the recipient, you must notify us (or call the recipient's office or submit a written Federal Action), or call 1-800-368-1091 (toll-free) (or submit a written Federal Action) to the Civil Rights Center (or submit a written Federal Action) within 180 days of the day on which you filed your complaint, you may file a complaint with the CRC. After receiving the notice. However, you must file your CRC complaint within 30 days of the 180-day deadline (in other words, within 210 days after the day on which you filed your complaint with the recipient). If the recipient does give you a written Notice of Final Action on your complaint, but you are dissatisfied with the notice or resolution, you may file a complaint with the CRC. You must file your CRC complaint within 30 days of the date on which you received the Notice of Final Action.

WORKSOURCE
a joint partner of the American Job Corps network

WorkSource is an equal opportunity employer program. Auxiliary aids and services are available upon request to individuals with disabilities. Washington Relay Service 711

State-Level EO Officer
Terese Eckstein
Email: TEckstein@wsp.org
Phone: 360-933-7324
Address: Employment Security Department
100 East 90th
Olympia, WA 98507-8044

Local EO Contact
For more information

1-800-368-1091

FILE REVIEWS

- Participant Files
 - No medical information
- Medical Files
 - Locked file cabinet
 - Limited access



EMPLOYEE/STAFF INTERVIEWS

- Training
- Serving individuals with disabilities
- Serving LEP customers
- Discrimination complaints

CUSTOMER INTERVIEWS

- Is the office accessible to everyone
- Quality of service
- Other information to share

EXIT MEETING

- Review our monitoring
- In-person or by phone

Discrimination Complaint Processing

MOA Element 8

29 CFR 38.72 - 38.76

- ▶ WorkSource customers have a right to participate in services and employment without being subjected to illegal discrimination
- ▶ Customers who believe they have been discriminated against may file a discrimination complaint:
 - ▶ In writing
 - ▶ Signed
 - ▶ Filed within 180 days of the last discriminatory incident
- ▶ Customers may bring a discrimination complaint to any WorkSource system staff through a telephone call or in person

Complaint against an employer

- ▶ If a customer notifies WorkSource staff that they want to file a discrimination complaint against an employer, the customer must be provided information on who to contact:
 - ▶ Washington State Human Rights Commission - File within 6 months
 - ▶ U.S. Equal Employment Opportunity Commission - File within 300 days

Complaint by a staff member

- ▶ File a discrimination complaint using their employer's internal discrimination complaint process
- ▶ File a grievance under a Collective Bargaining Agreement, if represented
- ▶ File a discrimination complaint with a civil rights enforcement agency including:
 - ▶ Washington State Human Rights Commission - File within 6 months
 - ▶ U.S. Equal Employment Opportunity Commission - File within 300 days
 - ▶ U.S. Department of Labor Civil Rights Center - File within 180 days

Customer Complaints

- ▶ Staff should not: try to determine if it is discrimination or not, try to resolve a discrimination complaint, or do anything that could seem to dissuade a person from filing a complaint
- ▶ They can provide the service the customer is seeking and explain processes
- ▶ If someone feels like they've been treated unfairly, they should be given their rights to file a complaint and then the complaint should be investigated or forwarded to the appropriate organization
- ▶ If someone chooses not to file a written complaint, we should still refer the concerns to the appropriate person

Staff Receipt of Complaint

- ▶ If a customer indicates they feel discriminated against in WorkSource, staff should give them their rights and the contact information for:
 - ▶ The Local Equal Opportunity Officer
 - ▶ The State-Level Equal Opportunity Officer
 - ▶ The USDOL Civil Rights Center
- ▶ Staff should know where to find a discrimination complaint form for the customer. Can't make someone wait or come back to file a discrimination complaint
- ▶ Written discrimination complaints should be immediately forwarded to the Local EO Officer
- ▶ Staff should continue to complete any other business they have with the customer

EO Officer First steps

- ▶ Log the complaint:
 - ▶ Name/address
 - ▶ Basis and description of complaint
 - ▶ Date filed
- ▶ Read the complaint and any emails or other supporting documentation
- ▶ You may need to conduct an intake interview with the complainant to get more information about their complaint

Determine Jurisdiction

- ▶ Is this in your WD area? WIOA services? Subrecipient?
- ▶ Does someone else have jurisdiction as well?
- ▶ If the allegations were true, would it be illegal discrimination covered by these rules?
- ▶ Don't do try to figure out if it was true or do fact finding at this point, just figure out jurisdiction.

Notice of receipt/Written Notice

- ▶ Acknowledgement of complaint
- ▶ Notice of right of representation
- ▶ Notice of rights (from EO Notice in 29 CFR 38.35)
- ▶ Notice that the complainant has the right to request and receive, at no cost:
 - ▶ Auxiliary aids and services
 - ▶ Language assistance services
 - ▶ Translation of the initial notice into non-English languages

Requirements for written statement of the issues

- ▶ List of issues raised in the complaint; and
- ▶ For each such issue, a statement of whether the recipient will accept the issue for investigation or if it is not in your jurisdiction, why you can't accept it

Requirements for Notice of Lack of Jurisdiction

- ▶ Must be issued within five business days of the recipient determining that it has no jurisdiction over a complaint
- ▶ Must include:
 - ▶ Statement of reasons for determining that the recipient has no jurisdiction
 - ▶ Notice that the complainant has a right to file a complaint with CRC within 30 calendar days of the date the complainant receives the Notice

Requirements for use of Alternative Dispute Resolution (ADR)

- ▶ Decision whether to use ADR *rests with complainant*.
- ▶ ADR may be attempted at any time after written complaint has been filed, but before Notice of Final Action is issued
- ▶ If no agreement reached, complainant may file complaint with CRC

Fact finding investigation

- ▶ When?
 - ▶ Every time you receive a discrimination complaint, if you've determined it's in your jurisdiction, if true would violate law covered by EO, and the complainant has not requested ADR
- ▶ Who?
 - ▶ Local EO Officer – or trained investigator
 - ▶ You and anyone investigating must be trained in WIOA EO and in conducting EO investigations

Confidentiality

- ▶ Integrity of the process
- ▶ Protecting individual rights
- ▶ Required by law
- ▶ Keep discrimination log separate from other complaint logs
- ▶ Only talk to people involved and notify them of confidentiality requirements
- ▶ Less chance of retaliation

Impartial Role

- ▶ Notify State-Level EO Officer and your management if you have a conflict of interest
- ▶ In your EO Officer role, you are ***not defending*** anyone, including your WDC or WorkSource
- ▶ You are required to be an impartial fact finder and to determine if nondiscrimination regulations or policies were violated

Prepare for the investigation

- ▶ Create your plan
- ▶ Research and understand the program requirements, rules, laws, etc.
- ▶ Locate background documents, review case notes, talk to experts
- ▶ Schedule interviews beginning with complainant, respondent last
- ▶ Write questions for each person you will interview (plan to ask follow up and adjust as you go)

Fact finding/Investigation Interviews

- ▶ Be objective
- ▶ Funnel: start broad and open, and narrow down to understand who, what, how, and why they think it happened, for each allegation
- ▶ Find out what specifically was said or done and how they perceived it, don't just accept their conclusion
- ▶ Take and keep good notes - gathering and writing down the facts, not making determinations at this point
- ▶ During interviews, remind everyone about confidentiality and retaliation

Analysis

- ▶ Review all facts
- ▶ Interview others if needed, follow up as needed, talk to experts
- ▶ Don't wait to resolve the issues
- ▶ Make determination

If Discrimination Is Found

- ▶ Notify management of finding
- ▶ Work with management on a fix
- ▶ Work with claimant on resolution and provide the service
- ▶ Can include:
 - ▶ Changing practices
 - ▶ Corrective action
 - ▶ Training

Notice of Final Action (NOFA)

- ▶ Written NOFA must be provided to the complainant within 90 calendar days of the date their complaint was filed
- ▶ The NOFA needs to include:
 - ▶ For each issue raised, your determination and explanation
 - ▶ A description of the way the parties resolved the issue(s)
 - ▶ Notice of rights to file a complaint with the CRC within 30 calendar days of the date the complainant receives the Notice

Recordkeeping

- ▶ In addition to logging the complaint, you need to keep all investigation materials for at least three (3) years. This includes:
 - ▶ Interview notes
 - ▶ Emails
 - ▶ Initial complaint
 - ▶ Report and/or NOFA
 - ▶ Any other documentation related the the investigation and complaint

Scenarios

- ▶ Break up into three groups
- ▶ Read through scenario, discuss in your group, answer questions
- ▶ Share with larger group

Resources

- ▶ State-Level EO Office
- ▶ SHRM article: <https://www.shrm.org/resourcesandtools/tools-and-samples/how-to-guides/pages/howtoconductaninvestigation.aspx>
- ▶ USDOL: <https://www.dol.gov/oasam/programs/crc/PracticalTipsElectronic.ppt>



SAFE

ZONE

TRAINING

LGBTQ Awareness Training

Employment Security

February 21, 2018

James Trujillo, HR Manager

Agenda



- Group Norms
- Introductions
- First Impressions
- Core Vocabulary
- Gender Unicorn & LGBTQ Umbrella
- Race to Success
- Scenarios
- Questions & Resources

Group Norms



- Phones
- Questions
- Vegas Rule – share only what you're comfortable sharing
- Laughter
- Airtime
- You can change your mind
- Pronouns

Introductions



- Please share:
 - Your name
 - Your preferred pronouns
 - Share one word that describes the LGBTQ community for you

First Impressions



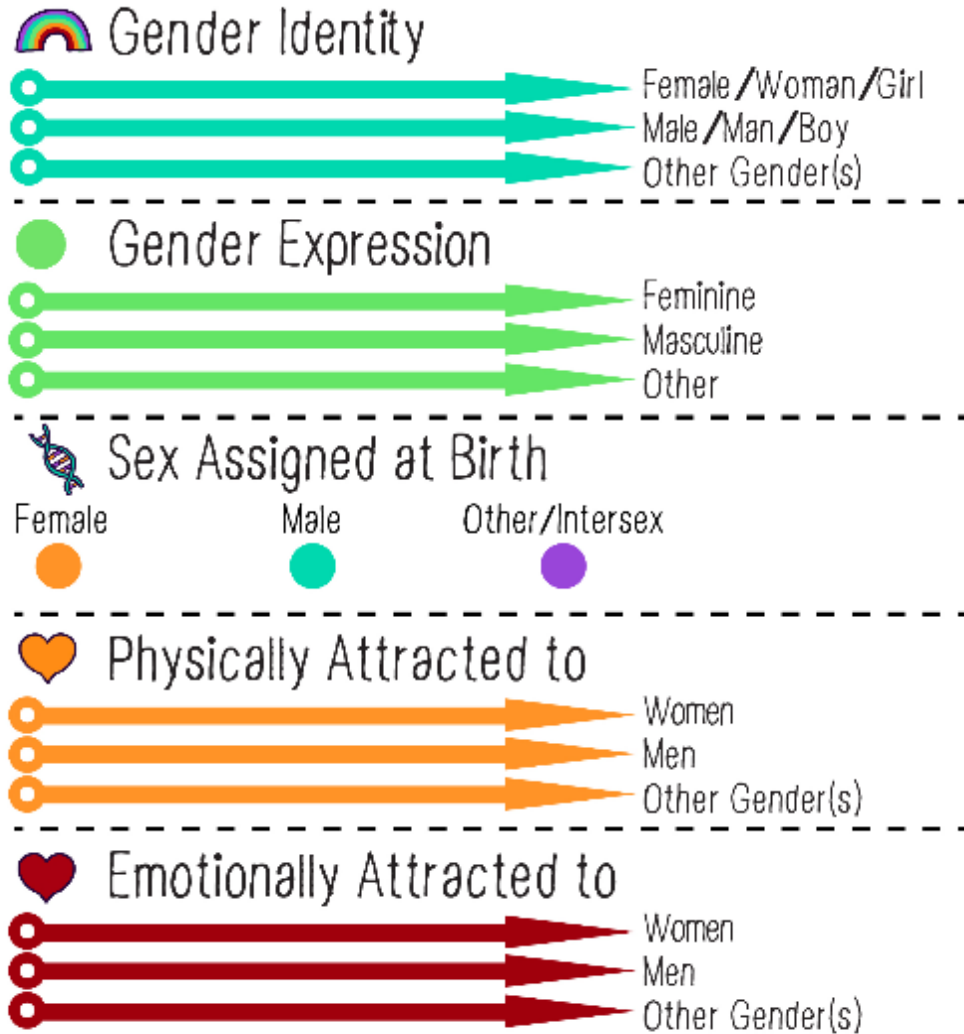
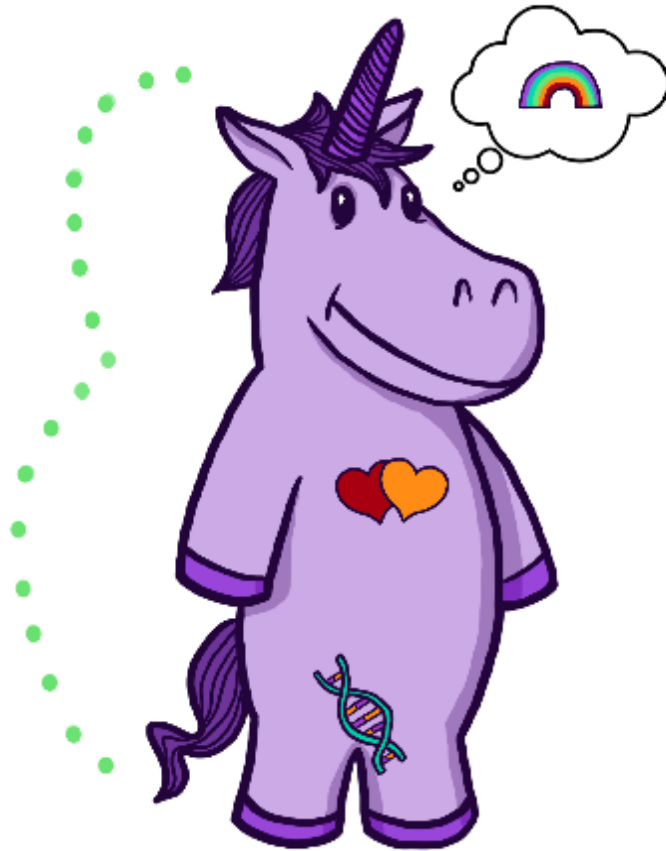
- Take five minutes to read the questions on page 4
 - During the five minutes, think about and/or write out your responses to questions; you will not turn this in for anyone else to read
- Next, take 5-8 minutes to verbally share some of your answers with people at your small table – only share what you’re comfortable sharing
 - Each person will have 1-2 minutes; share the time

LGBTQ Umbrella



The Gender Unicorn

Graphic by:
TSER
Trans Student Educational Resources



To learn more, go to:
www.transstudent.org/gender

Design by Landyn Pan and Anna Moore

Core Vocabulary – A Sampling



- Ally
- Cisgender
- Genderqueer
- Heteronormativity
- GSM – Gender and Sexual Minorities
- DSG – Diverse Sexualities and Genders

Race to Success



- For every statement you hear that applies to you, take a step either forward or backward based on what your facilitator tells you
- This is a silent activity without comments until the end



Coming Out
Advice (pg. 11)

Do's
and
Don'ts

Scenarios – Page 12



- Identify one person to be the scribe for your group.
- Identify one person to be the spokesperson for your group.
- You will be assigned one or two scenarios for your group to read, consider and discuss.
- Respond to the scenario and write down your group's thoughts.
- Share with the larger group.
- You will have 10-15 minutes to complete this activity.



What can you do now?

- Educate yourself, be curious and open to difference
- Provide training to staff on LGBTQ
- Partner with law enforcement on creating Safe Places
- Consider removing gender restrictions on single stall bathrooms
- Adding affirming signs to bathrooms
- Adding pronouns to signature blocks, introductions
- Remove gender designations from communications
- Review the resources in the participant guide; share as appropriate

Wrap up and Feedback

- What worked today?
- What could have been better?
- What was your one key take away?



Accessible Services Case Studies

Toby Olson & Hillary Rossi

The Case of the Retrograde Registration

Polly Planner was finally beginning to see light a little at the end of the tunnel. When she had begun putting together this training session on Tapping into the Hidden Job Market nearly six months ago, she'd had no idea how much work was going to be involved. But now with the training only four days out, she had terrific national trainers confirmed and scheduled; the new venue was going to work fine; and as the last few registrations came in, it was clear that attendance was going to be even better than she had hoped.

She was in a good mood when she answered her phone and heard, "Hello this is an operator with Washington Relay Service. Have you had a relay call before?"

"Uh, what?" She asked.

"Your caller is deaf," the operator explained, "he is using a TTY to call you through the Washington Relay Service. I will read what he types and type back anything you say. When you are ready for him to respond, say, 'Go ahead.'"

"How do I get this started?"

"Just as you would any other phone call," the operator said. "Say, 'Hello.' Your name, but remember to say 'Go ahead' when it's his turn to reply."

"Okay, hi, this is Polly Planner speaking. Go ahead."

After a short pause the operator began reading, "Hello Polly. Nice to meet you on the phone. This is Paul Crastinator. I just registered for the training on Tapping the Hidden Job Market. When I asked about sign language interpreters they said that you were the boss, and to call you. Go ahead."

Study Questions

1. The flyers and other advertisement for the training included the following notice: "Anyone needing special accommodations should contact Polly Planner at least two weeks prior to the event." How does that impact the Department's obligations toward Mr. Crastinator? Does it matter that the Department was still accepting registrations?
2. What questions, if any, should she ask Mr. Crastinator?
3. What should she tell him?
4. What should they discuss between them?
5. What should she do? Contact the ADA coordinator.

The Case of the Frightening Forms

Helen Helper thought that Abby Applicant had probably had a hard day behind her just getting herself to Helen's desk. First she had to take the kids on the bus to her mother's, then the bus back out to the Community Service Office, where she signed in and waited for an hour and a half for her name to come up so she could talk with someone. But Helen was sure that they were going to be able to make all of that effort worthwhile. She understood what Abby was looking for and she knew a program Abby would almost certainly be eligible for that could help. She pulled the application forms from the file, and passed them to Abby. "Just fill these out," she told her, "and we can get your application started today."

Abby looked the forms over for a few seconds before folding them up and putting them in her purse. She said, "I'll take them home and fill them out later."

"But you're here now," Helen admonished, "and we're almost done. This will only take a few minutes."

"I'd better be getting home." Abby said. "I'll fill these out and bring them back later." She stood and started to turn away and then paused. "Could I have another copy," she asked, "just in case?"

Study Questions

1. Is this a disability accommodation situation? Why, or why not?
2. What might Helen do to provide G.R.E.A.T. customer service for Abby?

The Case of the Garrulous Gabber

Phil Frontline tapped on edge of Linda Lead's open doorway. When she looked up he said, "I think we have a problem in the lobby."

That got her full and undivided attention. "What sort of problem," She asked?

"There's a man in the lobby who has been bothering some of the people waiting to meet with an intake worker."

"What's he doing?"

"He's talking to them." Phil recognized that his last statement hadn't managed to convey the sense of urgency he was going for so he added, "I mean he's really talking to them. He's intently talking to them. We've had complaints," he added. "I think some of the people are starting to get frightened."

"Has he threatened anyone?" She asked.

"No," Phil admitted, "but he's talking way too loud. We've all asked him to keep it down. That works for about ten seconds, then he's right back at full volume. And there's no way to end a conversation with this guy. People have gotten up and moved to the other side of the room, and he's followed them. And he stinks. He smells like diesel fuel."

"So," Linda asked, "why is he here?"

"He's waiting to see an intake worker," Phil explained. "There are about three names ahead of him on the sign in sheet."

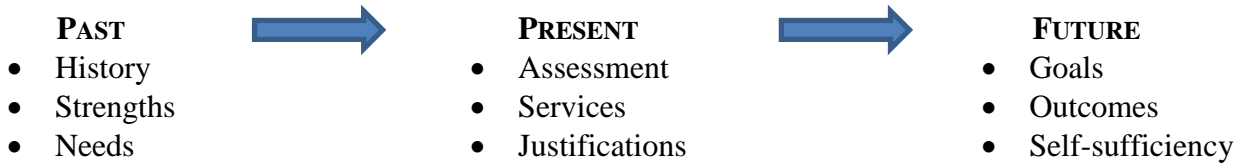
Study Questions

1. Is this a disability accommodation situation? Why or Why not?
2. What steps could Linda take now to address the immediate situation?
3. If serving this customer will involve future visits to their offices, what steps could Linda take to help those visits to go more smoothly than this one had?
4. If this customer's behavior were to prevent others from being able to get services, what steps could Linda take?
5. Could she exclude this customer from services because staff, or other customers are uncomfortable with his behavior?

Case Notes Desk Guide

Tell a Story

Strategic Organization to Self-Sufficiency



Who, What, When, Where, How, and Why Documentation Model

What to include in a case note. ** Required.

	Description
WHO **	Who is responsible for completing an activity? Who was involved in a service interaction?
WHAT **	What happened, what direction the person is going to follow, what is needed to accomplish goals, what will you do as a WorkSource representative to assist the customer.
WHEN	Date, time, future goal date, enrollment dates, etc.
WHERE	Where did an event/action occur, where the person is going, where has the person been?
HOW	How an action happened, how the person did something, how an individual behaved, how many activities the individual finished in a week.
WHY **	Why did an action occur or service strategy occur? This is based on assessment data . <i>This speaks to the justification for each service.</i>

Tips & Tools

SMART Goals: **S**pecific, **m**easurable, **a**chievable, **r**elevant, **t**imely (or time-bound).

OARS

Open ended questions: Cannot be answered with a yes/no. Provides a window into people's thoughts or feelings.

Affirmations: Recognizes strengths, builds rapport, and encourages information exchange.

Reflections: Shows that you are listening and provided opportunity to check understanding.

Summaries: The steroid version of reflections. Ensures agreements and helps transitions.

SAR: A method of documentation that helps weave a story.

Situation. Describes the current need, challenge, request.

Action. What was done.

Result. The outcome or effect of the action taken.

Case Notes Desk Guide

Best Practices

How to write effective case notes

Best Practice	Avoid
Clear and brief. Be as minimal as possible.	<ul style="list-style-type: none"> • Abbreviations& acronyms. • Jargon & clichés.
Concise and precise.	Statements should not be open to interpretation.
Readable by others. Monitors, participants, and supervisors can read and understand the story.	Making statements you would not want the participant to read.
Quote the participant: <i>John said he was feeling depressed about being unemployed.</i>	Ascribing feelings to the person or judgments about him/her.
Relevant: Objective and based on observation, data, or facts (who, what, when, where, and why).	Irrelevant: Personal comments or opinions. These are subjective and can be wrong or objectionable by others. Immaterial elements
Identify relationships. Mention others by name and vocational relationship. E.g. Cathy, Skagit Valley College worker retraining coordinator, provided training assistance for the prerequisites to the nursing program.	Documenting names and relationships that have nothing to do with the participant's vocational situation. E.g. the names of the participants' children, neighbors, friends. Never name another participant in a client's records.
Accurate, complete and timely.	Procrastinating. You may forget key items.

Disability Related Information

Best Practice	Example
Describe the support needed.	For job assignments that are not part of the typical routine, Emily needs to have a written task list.
Describe the desired environment.	John would like to work in an office environment with low noise levels. He would do well with an office outside of major traffic areas.
Describe the ability or limitation.	Bob can perform functions that that do not require lifting more than 25 pounds.
Describe the accommodation.	Sarah can successfully test when she is not timed.

*Modified from Documentation in a WorkSource Environment, Kennewick, August, 2010
Revision includes key points from NAWDP/Dynamic Works Webinar Series, October, 2014*

FAQs about Gender Identity

Slide 37 – Gender Unicorn

What does intersex mean?

People born with variations in sex characteristics including chromosomes, hormones, or genitals (all or part of more than one genital).

What does it mean that gender identity (and other items) are on a continuum?

Some people don't feel that they are 100% male or female or 100% gay or straight.

If you are trans are you also gay? (Are these interdependent?)

No, a lot of people confuse being transgender with being gay, and they are not interdependent.

Slide 38 – Gender Identity

What is the difference between male/man?

These are just examples of different ways people identify.

How do I find out what someone's gender is? (How to ask?)

Rarely do you need to know. If registering them in ETO, ask how they identify and list the options.

You can offer your pronouns and they may offer their own.

Use their name.

Do I have to use their preferred pronouns?

Yes. If you do not, it may be discriminatory.

What if I make a mistake with someone's pronouns?

People are forgiving if they know you are trying. Apologize and remember their pronouns.

Why do people put pronouns on their emails?

It's comfortable for cisgender people to share their pronouns. For people who are nonbinary, transitioning, or have ambiguous gender, it is a way for them to let people know how to refer to them.

Why do people use they/them pronouns? Its plural.

Some people are nonbinary, some people are transitioning, and some don't identify with just one gender.

We use they/them pronouns frequently without realizing it when we don't know someone's gender. For example, "They left their water bottle. I wonder if they will come back for it?"

Slide 39 – Gender Expression

Is this the same as transvestite? What about transsexual?

To a lot of people, the term transvestite is antiquated and offensive because it was thought of as a medical disorder. It has been replaced by the term crossdresser.

Many people find the term transsexual offensive because of the word 'sex' in the middle. It may suggest that being trans is about sexuality rather than gender identity.

Why do people who have recently transitioned from male to female sometimes dress so fancy/over the top?

For some people, it's the first time they have been able to dress and appear with the gender they have always felt they were. Sometimes it's to celebrate.

Why would someone not express their gender identity at work?

Fear of discrimination, mean comments, getting fired.

What if someone asks me how they should dress for an interview?

Describe professional dress, not gender specific.

Slide 40 – Sex Assigned at Birth

What does cisgender mean?

Identifying with the gender assigned at birth.

What if I don't believe there are more than two genders/What if I don't believe someone should choose their own gender?

We are not trying to change your beliefs, but you cannot act on those beliefs at work in a way that would violate rules, laws, or policies. You need to be respectful.

Is this about the birth certificate? What the doctor sees?

Yes. It's the gender that the doctor and parents assign at birth.

Do trans men have to register for selective service?

No. See selective service website. Only people who were assigned male sex at birth register for selective service.

Slide 41 – Gender Identity & Restrooms

Can anyone use whatever bathroom they want (free for all)?

No. Gender neutral restrooms which are single use locking restrooms are for anyone to use. Gendered restrooms (male/female) are used by people who identify with that gender.

What about my rights to use the bathroom without fear?

The law in WA State has included people's rights to use the bathroom of the gender they identify with since 2006. This is not a change and restroom norms have not changed. If anyone behaves inappropriately in the restroom, people should take action.

Why don't we make trans people use a specific restroom?

People have the right to use the restroom of the gender which they identify with. It's illegal to segregate people because they are different.

What if my child is in the restroom? I don't want my daughter going to the bathroom with a man.
You're welcome to accompany your child in the restroom.

What about when my child is in the YMCA locker room?
This training focuses on the WorkSource office.

What about my middle school daughter showering with a man?
This training focuses on the WorkSource office.

What if I walk into the women's restroom and see someone who looks like a man?
If you're uncomfortable, you can find a different restroom to use.

Will they complain about me if I walk out of the restroom?
Not if you are respectful.

Other questions:

Why do I have to learn this?

This is about respect and you are required to know the laws and regulations so that you don't discriminate.

What about pedophiles?

Wanting to have sex with children is not a sexual orientation or a gender identity. It is a psychiatric disorder and acting on it is illegal.

Why should I have to change/learn this?

This is about respect so that you don't inadvertently discriminate, and you understand what your responsibilities are.

Why is their choice more important than my right to be comfortable?

This is about the law and people's rights to be free from discrimination.

What are my rights?

You also have the right to be free from discrimination.

What will management do to protect me?

If someone complains about you, a fair investigation will be conducted.

I am afraid someone will file a complaint against me – these people are looking for someone to slip up, so they can complain.

This is about respect. If someone complains about you, a fair investigation will be conducted.