



NORTHEAST IOWA WORKFORCE DEVELOPMENT BOARD CORE PARTNER MEETING

Tuesday, September 1, 2026

9:00 a.m. – 10:00 a.m.

Join by Microsoft Teams:

<https://teams.microsoft.com/join/257939411189379?p=fN038JRDR6mvlG33vH>

ID: 257 939 411 189 379 **Passcode:** ke2cq9fn

Or Dial by Phone:

1.469.998.6043

Passcode: 196193309#

Notes

The September 1 Core Partner Meeting focused on system coordination, upcoming open houses, the referral system rollout, in-service day planning, and partner tools intended to strengthen referrals and co-enrollment. The meeting opened with appreciation for partners completing program update sheets and with a reminder that Microsoft Teams will be used going forward because it better supports recordings, attendance, and meeting notes.

Zeke shared that the first rough draft of the workforce system assessment has been completed. One of the strongest findings was continued customer-service performance, with the system showing an approximate satisfaction rate of 91.2% for July 2025 through July 2026. At the same time, the survey response rate remains very low, around 3%, which limits the ability to fully capture positive customer experiences. A key improvement area is to make the customer satisfaction survey shorter, easier to complete in centers, and more accessible to customers.

The assessment also identified strong partner collaboration across AJC operations, referrals, and service flow. Partners continue to show up for one another, and that collaboration is expected to be strengthened further through shared tools, stronger visibility, and clearer referral pathways. Areas for improvement include broader SharePoint use, better partner access to annual events, Wednesday staff trainings, and the staff directory, as well as increased support for co-enrollment.

Sara Cook and Victor Ochoa provided updates on several September open houses. Dubuque is scheduled for September 14 and will be connected with Make Your Mark Monday. Planned features include highlighted partner services, employer engagement, professional headshots, and LinkedIn profile support. Decorah is planned for September 28 and will include the mobile unit to help attract community attention. Mason City is scheduled for September 24 and will include professional headshots, coffee, partner showcases, and broad outreach through flyers and Workforce Board distribution. Waterloo is scheduled for September 21 from 10:00 a.m. to 1:00 p.m. and will align with Meet Your Future Monday, with planned partner participation, headshots, coffee, and employer engagement.

The open house discussion also led to a reminder that all public flyers need the required equal opportunity

and accommodations language. Karen noted that the language should include that IowaWORKS is an equal opportunity employer/program and that auxiliary aids and services are available upon request for individuals with disabilities, with accommodation requests directed to access@iwd.iowa.gov. Zeke agreed to update the flyers before posting or broader distribution and to remind other open house leads to do the same.

The largest portion of the meeting centered on the new referral system being developed with Creative Planning. Zeke explained that beta testing will begin the week of September 7, with representatives from each AJC participating in short test sessions. The testing group is expected to review the site layout, make sample referrals, explore navigation, and identify wording or workflow issues before formal launch. The system is intended to replace the current Microsoft Forms and spreadsheet process with a more accessible, user-friendly dashboard. Key features include individual partner accounts, a dashboard of active referrals, search and filtering by name, county, and status, duplicate detection, multi-select referrals for multiple programs, and automated email reminders. A referral will trigger an email when it is created, another reminder after 48 hours if no contact has been recorded, and another after one week if needed. The system is designed to increase visibility, reduce duplicate entry, clarify referral ownership, and support the 48-hour service level agreement.

Several partners raised helpful usability and wording concerns. Marla noted that “assigned to you” may make staff think every referral on the dashboard is personally assigned to them rather than assigned to their program or center. She also suggested replacing “create new client” with “create new referral” and questioned language such as “reason for assignment.” Jessica suggested “reason for referral” as clearer wording. Karen also noted that some instructions appeared to imply users would need to repeat steps for each program, which conflicts with the intended multi-select referral process. Zeke agreed to bring these wording concerns back to the development team.

Partners also discussed visibility and privacy. Bob asked how referrals involving disability-related information would trigger vocational rehabilitation involvement while still protecting confidentiality, especially when the referral may relate to a workforce employee. Zeke noted that the privacy structure is still being worked through with Erica and will need to remain consistent with the MOU. Partners also discussed county visibility for shared service areas, whether certain counties should be visible to multiple offices, and how program-specific service areas may differ.

The team discussed the current split-day in-service model, where half of staff remain on the floor while the other half participate in training. Breakout groups considered how to make the October 12 in-service day effective under the current model and how to potentially make the case for unified full-day in-service experiences in the future.

Across breakout groups, partners emphasized that full-day in-service events provide more time for meaningful learning, stronger relationship-building, and shared experiences such as business tours, program walkthroughs, and deeper cross-training. Participants noted that in-person time helps staff connect beyond virtual meetings and supports smoother referrals because staff know who they are working with across partner programs. The group also raised the importance of consistency, since split sessions may cover the same agenda but still produce different conversations and learning experiences.

After the formal meeting, partners discussed a potential laminated partner desk aid that would summarize program eligibility requirements and help staff make better referrals. The desk aid could include programs such as CSEP, GAP/PACE, vocational rehabilitation, Wagner-Peyser, Title I services, Ticket to Work, returning citizen supports, Job Corps, SNAP E&T, JVSG, Proteus, MSFW, American Indian Council, Northstar Digital Literacy, and Rosetta Stone. Partners liked the idea of using the aid to improve referral quality and suggested that eligibility language could potentially be built directly into the referral form.

Marla suggested adding an acknowledgment step so staff confirm that, to the best of their knowledge, the customer appears eligible for the selected service. Karen and Marla also suggested reorganizing the desk aid so frequently used programs and programs inside the centers are easier to find. JVSG and MSFW were specifically mentioned as items that may need higher visibility or clearer placement. Partners also recommended clarifying MSFW referral language with Andy Barnes to ensure the desk aid accurately explains when a referral should go to MSFW rather than being handled through standard career planning support.

The next meeting is scheduled for October 1st at 9:00 a.m. This one will be a Core & Required Partner Meeting.

Action Items

Action Item	Owner/Lead	Timing
Share referral system wording feedback with Creative Planning, including “assigned to you,” “create new referral,” and “reason for referral.”	Zeke / Erica	During beta testing
Begin beta testing the referral system with representatives from each AJC and collect real-world workflow feedback.	Zeke and selected partner testers	Week of September 7
Update all September open house flyers with required equal opportunity and accommodations language before distribution or posting.	Zeke / Open house leads	Before public posting
Refine partner desk aid content, including program order, frequently used programs, and MSFW referral language for review by Andy Barnes.	Zeke / Karen / Marla	Before desk aid printing