OKLAHOMA OFFICE OF WORKFORCE DEVELOPMENT

PROCESS MAPPING HOW-TO GUIDE

May 29, 2020

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Background

In the Spring of 2020, the Oklahoma Office of Workforce Development (OOWD) initiated a multi-level process mapping project with support from project consultant Maher & Maher. Initially, the project planned to build upon the work done in 2019 with OOWD that created a provider directory and process map of the job seeker experience for a pilot area, the Northeast Oklahoma Workforce Development Board, and add two more local areas, Western and South Central. Tasks were to include creating a provider directory for Western and South Central and mapping processes for both local areas using one joint, regional in-person meeting in April 2020.

However, due to the COVID-19 crisis, OOWD recognized that an in-person gathering would not occur and requested a change in the scope of work. The project was rescoped to include the following tasks:

- Develop a survey (to be used with SurveyMonkey or similar) that OOWD could distribute to local areas to assist in the completion of a resource directory for each local area;
- Create a "how-to" guide on process mapping that could be used by the state team across local areas; and
- Facilitate a train-the-trainer (TTT) virtual training for the state team to prepare them for process mapping with the local areas in the future.

Introduction to Process Mapping

Overview

Put simply, a process map is a visual representation of a process. Process mapping may include virtual and in-person processes or elements of each. Process mapping is a process improvement and change management approach that allows all stakeholders to come together and critically analyze a given process through the eyes of its customer(s). Customers of any particular process may be external (e.g. job seeker or employer customers), internal (e.g. fellow agency staff or local counterparts in state systems), or both. Process mapping allows leaders, managers, and frontline staff to collaboratively explore methods for improving both efficiency and effectiveness – ultimately with the goal of improving the value of the products or services the organization provides for the customers of the process.

At a high level, process mapping includes the steps described below:

➊ Define the as-is process

▶ To uncover problems that do not add value, inefficiencies, "breakdown" points, etc.

➋ Develop and prioritize problem statements related to the as-is process

▶ And identify the root cause of each problem

➌ Map the should-be state

▶ Consider the "ideal" in combination with "can-be" low/no-cost solutions

➍ Propose needed solutions and related recommendations

▶ In order to successfully implement the should-be state

Problems are defined as any step in the process that does not add value to the customer's experience. A non-value-added activity may be:

1. Duplicative (such as non-strategic communication requiring multiple discussions or unclear or multiple points of contact for partners)
2. Inconvenient (e.g. non-responsive office hours)
3. May otherwise not advance the customer's agenda and needs

The details of the mapping process are discussed at length later in this guide.

Benefits

Process mapping offers several benefits. The exercise:

1. Offers a "bottom-up" approach to innovation that involves all stakeholders in the change process
2. Builds stronger partnerships among system stakeholders
3. Improves knowledge of processes and stakeholders involved
4. Identifies problems and obstacles to delivering quality and value

5. Creates innovations that add value and streamline processes
6. Fosters a continuous improvement and customer/stakeholder-focused culture
7. Creates more agile capabilities to adjust processes in times of national emergencies and natural disasters

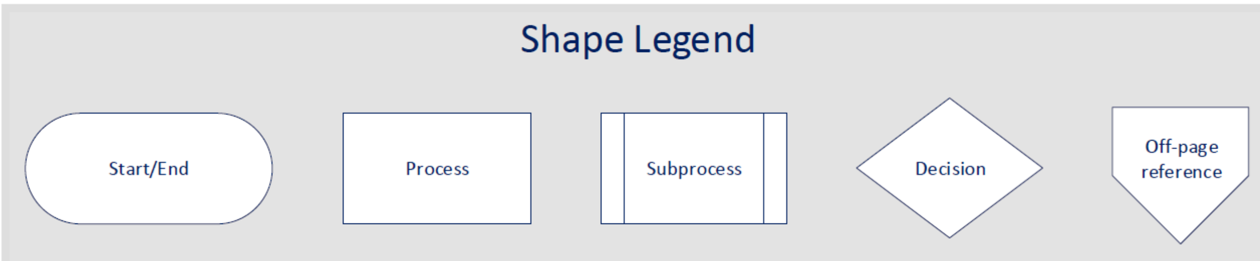
Key Principles

When pursuing process mapping, there are several key principles to keep in mind:

1. Set a realistic scope for the focus of the mapping exercise. For example, in the previous project, OOWD tackled the customer experience in one local area focused on youth programs rather than attempting to map the customer experience in the entire State. Future scopes with a local/regional lens could include opening a new AJC; adding a new AJC partner; or adjusting AJC intake and traffic flow patterns for social distancing.
2. Prioritize those processes that are most problematic and/or offer the greatest opportunity for improvement.
3. Keep the intent of the process at the forefront. A common pitfall is getting too focused in "the weeds" of the process being examined and losing sight of the desired goal for the process. Keep the big picture in mind, particularly when mapping the should-be process.
4. Be sure to include all stakeholders that are involved in the process being examined, from managers to frontline staff; external partners and ultimate customers may also need to be involved. Keep in mind that different stakeholders may have different perspectives about the process; for example, managers and frontline staff may offer distinct opinions about a process. Ensure that all involved stakeholders have the opportunity to offer their candid input.
5. Keep the customer(s) at the center of the mapping exercise, particularly when mapping the should-be state. If the conversation seems to get hung up on the minutiae of a particular step or aspect of the process, it can be helpful to step back and ask, "What would be ideal from the customer's perspective?"
6. As much as possible, define each step in the process clearly, and assign ownership where feasible. For example, "The Unit Manager enters cost overrun data into the internal accounting dashboard" is more helpful than "Cost data is entered into the system."
7. Balance the need for detail with the need for ease of use. It can be tempting to include an extensive level of detail in a process map, including building out numerous sub-processes. Keep in mind that the map is not the end-product; it is a tool to support understanding and implementation of a process. Strive to create process maps that an individual with little or no pre-existing subject matter familiarity could pick up and understand easily.

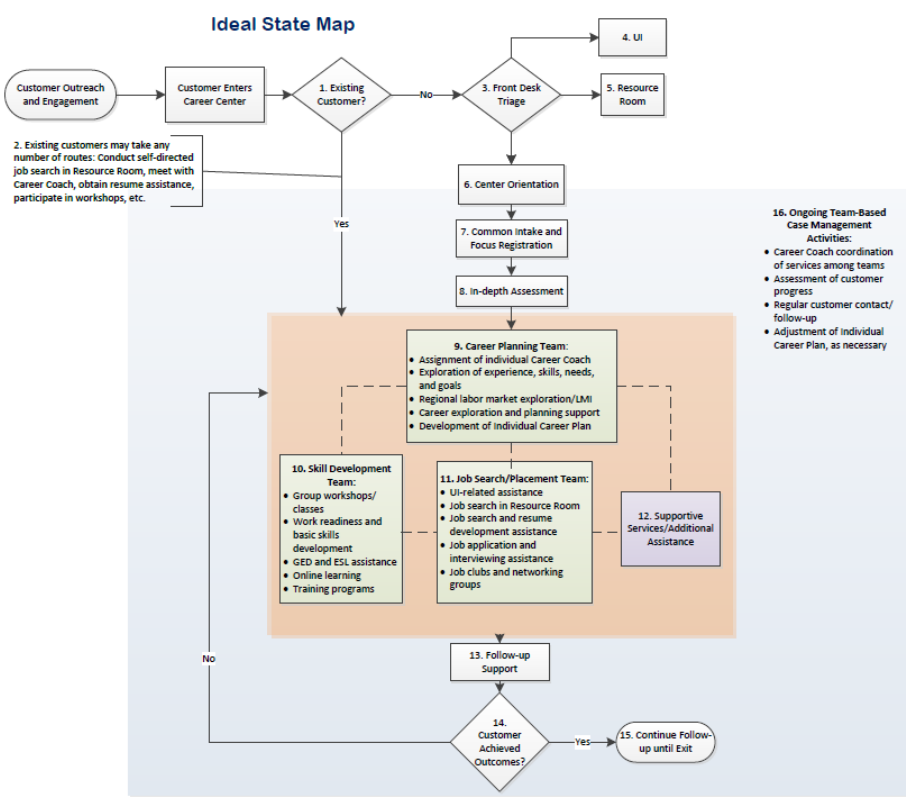
Process Mapping Symbols

Generally speaking, process mapping employs flow-charting and the use of standardized symbols to ensure a shared understanding of process elements. Some of the most common symbols used in maps are shown below; arrows between shapes are used to show the direction of the process. Core complex processes may require the use of a wider variety of flowchart symbols.



Sample Map

Pictured below is a sample map for the should be (or ideal) state developed as a result of mapping jobseeker customer flow process and experience. This example is shown, not as the correct customer flow experience, rather as a way to exemplify how the symbols are used and what a final mapping process can result in.



How Can We Use Process Maps?

Process mapping and the end product have been used by organizations in a variety of ways. Often, process mapping is done with one goal in mind and yet, many organizations find there are additional uses discovered after the process. Process maps have been used as:

1. Information sharing resource and tool for staff and customers
2. Analytic tool for staff not part of the mapping process
3. Training tool for new staff
4. Team building within a team and with external partners
5. Opportunity to strengthen collaborations or create new ones
6. Tool to shape new program design
7. Starting point for strategic planning
8. Way to shift form a local to a regional perspective

Process Mapping Methodology

Maher & Maher uses a seven-step approach for process mapping:

Step 1: Determine Process Mapping Structure

It is important to determine in advance the structure for the mapping process.

1. Who will be involved?
    a. Who will oversee this process? Will there be a planning team? It is recommended to keep the planning team smaller with perhaps 5-7 members otherwise it can become unwieldy to schedule and stay focused.
    b. Will the focus be local versus regional staff?
    c. Which staff titles will be invited to the in-person session – frontline, managers, leadership, or a combination? Typically, process mapping works best in groups of 10-20 individuals. Larger than this number is not impossible but can become harder to manage.
    d. Which agencies will be involved? Internal staff only or will partner staff be included?
2. Who will facilitate the process mapping?
    a. There are several options for facilitation:
        a. Local or regional staff member
        b. Peer area staff
        c. OOWD staff
        d. Partner staff
        e. External (consultant)

   b. It is often recommended to use external facilitators as they can remain neutral and can offer examples of other mapping processes and experiences. It can also be challenging for a staff member to both participate and facilitate.
   c. Ideally, regardless of who is doing the facilitation, there are two facilitators identified to manage the room, discussions, and note-taking.

3. What will be the structure and timing?

   a. It is recommended two days for mapping an as is and should be mapping process, but this can be adjusted.
   b. Will the days be spread out or consecutive?

4. What will be the meeting logistics?

   a. Determine a location and consider necessary travel for all invited. Is there a central location? Is there a need to plan accommodations? Will meals be provided or are there nearby options?
   b. Select a room conducive to process mapping. Technology should be included for accompanying PPTs. The room should allow for movement, small group discussions and tables that can be moved. There should be wall space for posting flip chart paper and tabletops with enough space for working on flip charts.
   c. Whenever possible, in-person meetings are preferred, but virtual options can be considered for some of the steps of the mapping process. In these instances, consider the following:
      a. Do we have the appropriate technology in place for the virtual session? Do attendees? What is needed if the technology or access is missing?
      b. How can we keep attendees engaged?
      c. How will we facilitate discussions?
      d. How will we ensure active participation?
      e. Do we need to adjust the scheduling? For example, more sessions but less time for each?
      f. How will we gather attendee inputs, assignments, and feedback?

Step 2: Identify Priority Processes for Mapping

There are several options for this step. This step can be done in advance by the planning team identified in Step 1, as a step prior to the in-person session with selected invitees or as the initial part of the first in-person session. Another option is to have the planning team home in on the general topic area and then selected invitees or in-person attendees refine the priority process(es) for mapping.

1. Based on the option chosen, bring together appropriate individuals to discuss processes that are not working optimally and that could benefit from improvement.

2. List all of the processes identified for potential process mapping, and then have participants rank them in priority order. In ranking their priorities, participants should consider those processes that are most challenging or problematic, most central to the organization's mission and functioning, and most likely to offer significant benefits if improved. Participants may also wish

to prioritize processes that are "low-hanging fruit," particularly if they are new to process mapping. Potential processes to map might include the job seeker intake process, business services processes, partner referral processes or follow-up services processes.

3. Start the mapping exercise with the most-prioritized process (or top few processes).

Facilitation notes:

- As mentioned, ideally, the individual(s) facilitating the mapping exercise should be seen by all parties involved as neutral and as not having direct oversight over the process being examined. This helps to ensure that all participants in the exercise feel comfortable with providing their honest input.

Materials:

- Sticky flip chart pads, markers, and easel

Step 3: Conduct Pre-Work Process Mapping Activities

There are several pre-work, or prior to the in-person meeting, process mapping activity options that could be done if desired. There is no right or wrong option and the process mapping lead and team should determine which makes the most sense by factoring in the following considerations:

1. Are there particular activities that need to be accomplished and would be better off completed prior to the in-person event?
2. How much time is allocated for the in-person event? If a full day is not feasible, some pre-work activities may ease the time constraints.
3. How many will be involved in the pre-work activities? Is it just the process team or would all attendees of the future in-person meeting be involved?

Potential pre-work activities:

1. Develop a survey to get a sense of existing conditions prior to the in-person event.

   This can help gather pertinent information for the facilitators to better understand the bigger picture. It will also bring together important information that might highlight duplications or gaps in services. Facilitators may choose to use this information to develop an initial map or instead compile this information into a summary format that can be shared at the in-person event. Another added benefit of the survey is that the responders start their initial engagement and begin to think about processes, and potentially challenges, prior to the in-person event.

Attachment A: Pre-Work Survey Sample is offered as an example that could be developed to provide information prior to the in-person event.

2. Use the pre-work time to work on a related deliverable.

   In the 2019 work with OOWD, a provider directory was developed for the Northeast Oklahoma workforce area. The deliverable started with a survey to capture local resources which were then compiled into a directory. For the current project, an updated survey was developed for the Western and South-Central workforce areas and is provided as an attachment. If OOWD chooses to continue developing local or regional directories, this can be included as part of the pre-work activities.

   Attachment B: Oklahoma Provider Directory Survey includes questions that can be used to gather information for a provider directory.

3. Conduct as-is mapping pre-work.

   Have the group that will be part of the upcoming future event gather (in-person or virtually) for a pre-work discussion to outline the general flow of the as-is process being examined and to identify an initial list of problems in the as-is process.

   As mentioned previously, problems are defined as any step in the process that does not add value to the customer's experience. A non-value-added activity may be:

   - Duplicative (such as non-strategic communication requiring multiple discussions or unclear or multiple points of contact for partners)
   - Inconvenient (e.g. non-responsive office hours)
   - May otherwise not advance the customer's agenda and needs

   Use the group's input to develop an initial map of the as-is process and an initial set of problems with the process. Neither this initial map nor the list of problems needs to be refined at this point; their purpose is to inform discussion in the steps that follow.

Step 4: Hold the As-Is Process Mapping Meeting

The in-person event brings together attendees identified in Step 1. Some of these individuals, or perhaps all, will also have been involved in pre-work activities identified in Step 3. If this is the first time convening the group, plan for a full day agenda, including a break for lunch. If some of the pre-work activities included initial mapping, the day can be shortened.

Include time in the meeting to frame process mapping, including its purpose, benefits, and implementation uses. Allow time for questions and then begin instructions for the process mapping activities. Set aside sufficient time for the initial process mapping.

Typically process mapping works best with groups of 10-20 individuals. Larger groups are possible but may require some activities broken down into smaller work groups that reconvene throughout the day. In this case, there are two options.

One option is for each group to work on a different phase of the process and then reconvene to comment and put the phases together into one map. Alternatively, small groups can map the process in its entirety and then reconvene to compare notes and come up with a final map. Although both options work, typically it is more efficient to have each group work on a phase. If the size of the group is small enough, and breakout groups are not necessary, the full process can be mapped together.

At this end of this activity, there will be a draft map to work with for the rest of the day. For groups where a pre-work activity already created a map, this section of initial mapping can be skipped.

Mapping instructions should include the following guidelines:

- Focus on what generally, typically, and most commonly takes place within your process phase. The goal here is to map the overall process, not the various nuances of the process that may take place in different locations or institutions.
- Use butcher paper or flip chart pages according to the group's preference to sketch out a first draft of the current process in your assigned phase. At this point, focus on major process elements, rather than delving into subprocesses of key process steps. Start at the very beginning of your phase and go through the end of your phase. You might prefer to use post-it notes rather than markers for recording each step in the process; using post-it notes often makes it easier to move steps around and edit them as necessary.
- Once you have a draft done, discuss as a group: Is this reflective of the general current process? Are we missing anything? Are there sub-processes we need to map in a bit more detail? Have we captured all the decision points, as well as what happens depending upon the possible outcomes of a decision? Edit the map as needed.
- Once you have come to consensus on the process, make a clean version of the map, using either post-it notes or markers, for your phase of the process. Prepare to present your process phase to the full group for discussion and feedback.

Using the draft map developed, validate, and refine the as-is process with the group, making changes and additions, including identification and development of any priority sub-processes, as necessary.

Once the group feels that the as-is map is complete and correct, move into identifying the issues and problems with the as-is process. Problems could be conditions or activities that do not add value, that limit efficiency, or, in the worst case, that obstruct process and progress and cause delays or roadblocks. Some of these problems may have been identified through the pre-work mapping or survey activities. For each problem identified, discuss its potential root cause. For example, one identified problem might be that monitoring reviews do not go to sufficiently comprehensive depth, but the root cause of the problem might be insufficient staffing.

Once the full list of issues/problems and root causes has been developed, facilitate the group through a process to cluster similar problems, prioritize problems, and develop and refine problem statements for each priority problem area. Only list problem statements that the full group agrees by consensus to include. Examples of problem statements include:

- *Historically, job seeker customers provided repetitive intake information to all partners.*
- *Referring partners are not regularly updated on customer progress.*

- *Feedback received from business customers to business service staff are not captured to share with career coaches or to shape job seeker services.*
- *We lack dedicated staff persons who can research, track, and analyze the impact of changing labor market conditions.*
- *WIOA core partners are not adequately involved in the development and review of policy.*
- *Policy changes are not regularly shared with those in program services and impacts are not clearly defined.*

Attachment C: Sample As-Is Agenda offers agenda topics for a full-day session.

Attachment D: Sample As-Is Mapping Instructions offers a handout for process mapping that can be on the screen in the PPT and printed for groups to have in front of them as a reference. It includes instructions as well as the guidelines mentioned above.

Facilitation notes:

- Facilitation of as-is mapping meetings works best when "tag-teamed" by two individuals. With this approach, facilitators can alternate between taking the lead on supporting discussion and taking the lead on recording mapping and other notes.
- When refining the draft as-is map with the group, facilitators should use post-it notes to make notations about map changes and additions.
- When crafting problem statements with the group, it is useful to project a laptop onto the meeting room screen so that participants can following along and provide input as a facilitator types and refines the problem statements.
- As-is mapping discussions almost inevitably surface material that should be considered in the should-be mapping phase and in the development of recommendations related to implementing should-be processes. Be sure to have dedicated flip chart pages to capture should-be content and related recommendations.
- Take pictures of map changes and flip chart notes, because you will later use the pictures to refine and finalize the as-is map in a flowcharting software program and to type up problem statements and any other important notes from the meeting.

Materials:

- Laptop with PowerPoint slides; projector and screen
- Meeting agenda
- Post-it notes and pens
- Sticky flip chart pads, markers, and easel

Step 5: Conduct Should-Be Mapping Pre-Work

Share the final as-is map, the problem statements, and any other notes with the group for their review, comments, and revisions. As pre-work for the next meeting on should-be process mapping, ask group members to submit their written thoughts (brief bullets are fine) on should-be process steps, solutions to problem statements, and any related recommendations to support attainment of the desired should-be process. Organize and synthesize the input received (do not include submitters' identifying information) and distribute it to group members in advance of the should-be process mapping meeting. These steps can be done over email, conference calls or webinar sessions as appropriate.

Facilitation Notes:

- Typically, this step is conducted virtually, over email, conference calls or a webinar, but it could certainly be accomplished via an in-person meeting if that is preferred.

Step 6: Hold the Should-Be Process Mapping Meeting and Develop Recommended Solutions

Reconvene the group for the should-be mapping meeting. Plan for a full day, including an hour-long break for lunch. Agenda items should include a brief review of the finalized as-is process map with the group before moving on to should-be mapping tasks. Spend time reviewing the solutions to challenges submitted by the group as pre-work and facilitate a discussion to come to consensus on solutions and process steps to include in the should-be map.

Next, move to building the should-be map. During the course of the discussion, group members will almost certainly identify higher-level recommendations that may not be appropriate for inclusion as steps on the map but that should be shared with management; be sure to record these on flip charts for further discussion.

Re-introduce the general mapping principles:

- Set a realistic scope.
- Keep the intent of the process at the forefront. Focus on the overall big-picture goal – do not get too focused in the weeds.
- Keep in mind that different stakeholders may have different perspectives about the process; for example, managers and frontline staff may have distinct opinions about a process. Allow all to offer their candid input.
- Keep the customer(s) at the center of the mapping exercise. If the conversation seems to get hung up on the minutiae of a particular step or aspect of the process, step back and ask, "How should the customer experience this?"

- As much as possible, define each step in the process clearly, and assign ownership. For example, "The Unit Manager enters cost overrun data into the internal accounting dashboard" is more helpful than "Cost data is entered into the system."
- Balance the need for detail with the need for ease of use. Keep in mind that the map is not the end-product; it is a tool to support understanding. Create maps that an individual with little or no pre-existing subject matter familiarity could pick up and understand easily.

Re-distribute the mapping instructions from the As-Is session (Attachment D).

Once the group feels that the should-be map is complete and represents the desired process, include time in the agenda for analysis of opportunities new partnerships, stronger collaborations, or program innovations. Also revisit the discussion around supporting recommendations to management. These recommendations should include areas that must be addressed in order to achieve successful implementation of the should-be process. For example, if one of the identified root-cause problems is insufficient staffing, a recommendation that staffing be increased, or staff responsibilities be redistributed more equitably might be made.

Following the should-be mapping meeting, the final should-be map and a finalized summary of problem statements and related recommendations to management should be distributed to the group.

Attachment E: Sample Should-Be Agenda offers agenda topics for a full-day session.

Facilitation Notes:

- Facilitation of should-be mapping meetings works best when "tag-teamed" by two individuals. With this approach, facilitators can alternate between taking the lead on supporting discussion and taking the lead on recording mapping and other notes.
- All should-be mapping meeting participants should be provided a handout of the finalized as-is map to have in front of them during the meeting. The finalized as-is map should also be projected on a PowerPoint slide. Facilitators may also wish to have the final as-is map enlarged poster-sized on foam board and displayed on an easel in the meeting room.
- Use a large whiteboard and dry-erase markers to develop the should-be map.
- When developing the should-be map with the group, emphasize that you are looking to create an aspirational but also attainable process. In some cases, the "ideal" process may not be realistically attainable given cost restrictions or other constraints. Should-be mapping participants should thus focus on "can-be" process solutions that represent the desired future state but can also be implemented at low or no cost.
- When working on recommendations for management with the group, it is useful to project a laptop onto the meeting room screen so that participants can following along and provide input as a facilitator types and refines the recommendations.
- Take pictures of the should-be map and meeting notes. After the meeting, the facilitators will use the pictures to finalize the should-be map in a flowcharting software program and to type up recommendations and any other important notes from the meeting. Share the final should-be map, the recommendations to management, and any other notes with the group following the meeting.

Materials:

- Laptop with PowerPoint slides; projector and screen
- Meeting agenda, final as-is map, and recommended solutions
- Poster-sized final as-is map
- Whiteboard and dry-erase markers
- Sticky flip chart pads, markers, and easel

Step 7: Develop Plans for Sustainability and Supporting the Should-Be Process Implementation

Following submission of the as-is and should-be maps and problem statements and recommendations to management, the mapping team, in collaboration with other organizational stakeholders as necessary, will need to consider what supporting plans need to be developed to advance adoption and implementation of the should-be process and related recommendations.

This step could be included with the should-be in-person event, can be a separate in-person event, or can be conducted virtually through webinars/conference calls.

There are several ways to develop implementation planning and sustainability. These include:

- Start with an implementation plan that includes actions needed, stakeholder responsibilities and timelines. Chart additional information such as:
  - Who needs to be involved? Who else should be brought in?
  - What cultural changes are needed (mindset)?
  - What training/cross-training/staff development is needed?
  - What are the potential obstacles?
  - What issues need to be elevated to decision-makers (and who are they?), e.g. policy barriers, funding challenges, etc.?
- Develop on-going accountability and progress tracking structures that includes regular check-in points:
  - Create a follow-up plan that includes regular progress updates
  - Determine who will lead this process
  - Determine frequency of check-ins
  - Determine how check-ins will be conducted (i.e., in-person or virtual)
  - Determine how progress will be documented
  - Develop dashboards as appropriate
- Develop quality assurance protocols with designated lead(s)
  - Develop interval benchmarks for progress
  - Develop review protocols
  - Determine how success will be achieved
  - Determine decision points for redesign if needed
- Use tools such as surveys, focus groups, assessments, and interviews to monitor implementation efforts

Attachment F: Process Mapping Facilitators Overview provides a summary of the steps for facilitators.

Conclusion

As described earlier, process mapping can be a valuable activity with far reaching implementation throughout the State. Expected benefits range from increased knowledge of all partners and their resources and services to new innovations that add value and streamline processes. Taking the time to ensure the mapping process is thoughtful and well planned, will lead to a more enhanced and beneficial experience. Maher & Maher appreciates the opportunity to work on this project with OOWD and welcomes further questions or discussions.

Appendix

1. Attachment A: Pre-Work Survey Sample
2. Attachment B: Oklahoma Directory Survey
3. Attachment C: Sample As-Is Agenda
4. Attachment D: Sample As-Is Mapping Instructions
5. Attachment E: Sample Should-Be Agenda
6. Attachment F: Process Mapping Facilitators Overview

Attachment A: Pre-Work Survey Sample

Pre-Work Survey Sample

These sample survey questions were used in a process mapping project that looked at services offered to individuals in correctional facilities pre- and post-release. The survey can be distributed and completed using an electronic survey tool such as SurveyMonkey from which results can easily be complied.

[Include background text here]

To start this project, we are asking a group of individuals from several organizations (e.g. corrections, workforce development, health and human services, education, etc.) to provide input on the current overall landscape of services provided to individuals both pre- and post-release. This feedback will be used to inform and shape the more intensive mapping activities for both the current and future state processes.

Please submit your responses by [DATE]. We thank you in advance for taking the time to complete this tool and assist us on the project!

1. Please provide your name, title, organization, and office location. This information is confidential and will not be shared; it is being collected solely for response tracking purposes.

2. Please describe pre- and post-release services that are currently being offered in the following areas:

    a. Career information and exploration
    b. Job readiness assistance
    c. Adult education/adult basic education (ABE)
    d. Secondary education services
    e. Post-secondary education services (2-year and 4-year opportunities)
    f. Occupational skills training/credentialing opportunities
    g. Work-based learning opportunities
    h. Mental health services
    i. Medical/physical health services
    j. Substance abuse services
    k. Housing assistance
    l. Childcare assistance

m. Transportation assistance
n. Non-custodial support assistance
o. Legal services
p. Family reunification
q. Documentation/identification assistance
r. Other

3. When you think about pre-release services, which ones stand out as being strongest and most widely available? Why?

4. When you think about pre-release services, which ones stand out as being most limited and in need of improvement? Why? What could improve these?

5. When you think about post-release services, which ones stand out as being strongest and most widely available? Why?

6. When you think of post-release services, which ones stand out as being most limited and in need of improvement? Why? What could improve these?

7. What other thoughts, input, or recommendations do you have for the Project as we engage in the current and future state mapping process?

Attachment B: Oklahoma Provider Directory Survey

Oklahoma Workforce System Provider Directory Survey

1. What is the name of your organization? ______________

2. List your organization's:
   - Address _________________________
   - Phone Number ___________________
   - Website _________________________
   - Hours of Operation ________________

3. Please provide the following information for a point of contact for your organization:
   - Name
   - Title
   - Email Address
   - Phone Number

4. Select the primary services you currently provide to students, job seekers, or workers on a regular basis. (select all that apply)

   - Supportive services (e.g. childcare, transportation)
   - Career exploration, navigation, and coaching services
   - Pre-employment assistance (interview coaching, resume preparation, etc.)
   - Education-related services (Adult Education) – Adult Basic Education
   - Education-related services (Adult Education) – Adult Learners
   - Education-related services (secondary education)
   - Education-related services (post-secondary education)
   - Soft skills training
   - Job search and placement services
   - Job/technical skills training
   - Post-employment retention or advancement services
   - Services for non-English speakers and English language-learners/other acclimation services
   - Customized training
   - Funding/scholarships for individuals to participate in education or training services
   - Industry certifications
   - Work-based learning
   - Justice-involved
   - Disconnected youth
   - Business Services
   - Other ____

5. Does your organization have eligibility requirements to receive services? If so, please briefly list them below.

6. What are your organization's areas of service expertise?

7. What is the primary target adult populations you serve on a regular basis?

8. Please list the top 3 organizations with which you currently partner and collaborate beyond referrals.

9. Which partners would you like to collaborate with?

Attachment C: Sample As-Is Agenda

Sample As-Is Process Mapping Agenda

Agenda is based on a full-day session with a lunch and two breaks.

- Welcome and Introductions
- Project Overview (suggested time 20-30 minutes)
  - What is mapping?
  - What are the benefits?
  - Process overview
  - Timelines
  - Foundations and ground rules
- Pre-Work Results (suggested time 15 minutes)

BREAK

- Starting the Process (suggested time 20- 30 minutes)
  - Developing work groups (if breaking into smaller groups)
  - Key principles to remember
  - Map process guidelines
- Mapping (suggested time 60-75 minutes)

LUNCH

- Mapping Presentations (suggested time 60 minutes)

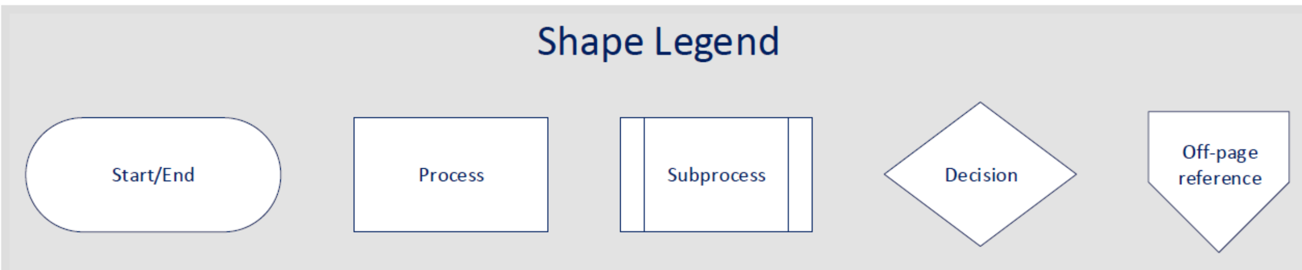
BREAK

- Identifying Issues and Challenges (suggested time 30 minutes)
- Developing Problem Statements (suggested time 30 minutes)
- Wrap Up and Next Steps

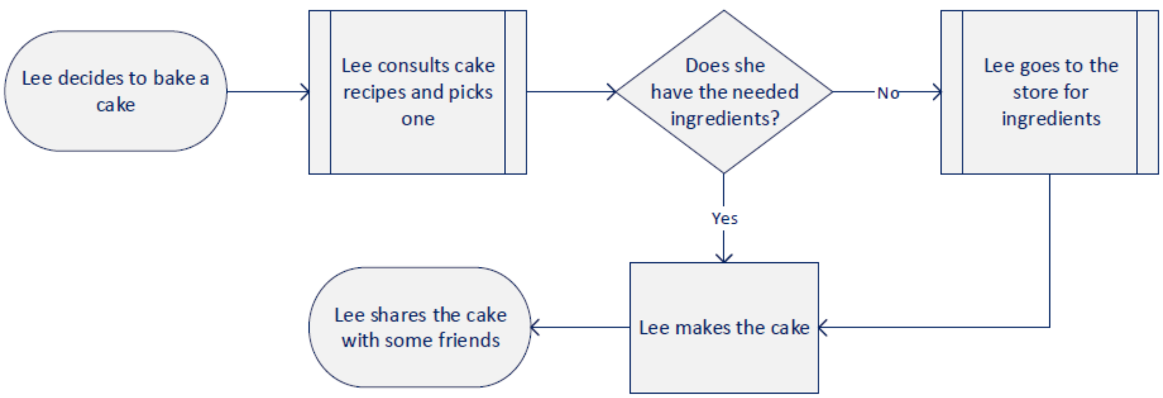
Attachment D: Sample As-Is Process Mapping Instructions

As Is Process Mapping Instructions

As you map your assigned process phases, please use the following symbols for each step of the process to the best of your ability:



Here is a very simple example of a process map that uses most of the symbols above:



Please keep the following instructions in mind as you map the phases of the process:

- Focus on what generally, typically, and most commonly takes place within your process phase. The goal here is to map the overall process, not the various nuances of the process that may take place in different locations or institutions.
- Use butcher paper or flip chart pages according to the group's preference to sketch out a first draft of the current process in your assigned phase. At this point, focus on major process elements, rather than delving into subprocesses of key process steps. Start at the very beginning of your phase and go through the end of your phase. You might prefer to use post-it notes rather than markers for recording each step in the process; using post-it notes often makes it easier to move steps around and edit them as necessary.

- Once you have a draft done, discuss as a group: Is this reflective of the general current process? Are we missing anything? Are there sub-processes we need to map in a bit more detail? Have we captured all the decision points, as well as what happens depending upon the possible outcomes of a decision? Edit the map as needed.
- Once you have come to consensus on the process, make a clean version of the map, using either post-it notes or markers, for your phase of the process. Prepare to present your process phase to the full group for discussion and feedback.
- If your group finishes early, please join the group working on the next phase of the process.

Attachment E: Sample Should-Be Mapping Process Agenda

Sample Should-Be Mapping Process Agenda

Agenda is based on a full-day session with a lunch and two breaks.

- Welcome, Introductions and Project Overview
- Current State Map review (suggested time 30 minutes)
- Priority Process Changes (suggested time 45-60 minutes)

BREAK

- Future State Mapping (suggested time 60-75 minutes)

LUNCH

- Mapping Presentations (suggested time 60-75 minutes)

BREAK

- Implementation Plan Development (suggested time 45-60 minutes)
- Self-Reflection (suggested time 20-30 minutes)
- Wrap Up and Next Steps

Attachment F: Process Mapping Facilitators Overview

The Process Mapping Facilitators Overview is intended to provide a high-level summary of the steps and preparations a facilitator should consider when engaging in a process mapping experience. Additional details, including sample agendas, pre-work, and facilitator notes are contained in the body of the Oklahoma Office of Workforce Development Process Mapping How-To Guide. These resources are intended to work in tandem as the facilitator prepares to begin the exercise of process mapping.

Step 1: Determine Process Mapping Structure

- Who will be involved?
- Who will facilitate the process mapping?
- What will be the structure and timing?
- What will be the meeting logistics?

Step 2: Identify Priority Processes for Mapping

- Gather appropriate individuals to decide on priority areas for process mapping

Step 3: Conduct Pre-Work Process Mapping Activities

- Determine if pre-work is appropriate (reference Process Mapping How-to-Guide for pre-work options)
- Identify pre-work assignment and communicate expectations with participants

Step 4: Hold the As-Is Process Mapping Meeting

- Create agenda for meeting, including explanation of the purpose of process mapping, benefits, and goals (reference sample agendas)
- Provide mapping instructions for as-is mapping and complete mapping
- Take photos of maps and flip chart notes

Step 5: Conduct Should-Be Mapping Pre-Work

- Provide notes and maps from as-is mapping to attendees and ask for reflections
- Decide if pre-work can be accomplished virtually over email or webinar

Step 6: Hold the Should-Be Process Mapping Meeting and Develop Recommended Solutions

- Reconvene the group for the should-be mapping meeting, plan for a full day
- Identify priority process changes
- Develop the should-be process map
- Identify implementation strategies

Step 7: Develop Plans for Sustainability and Supporting the Should-Be Process Implementation

- Consider what supporting plans need to be developed to advance adoption and implementation of the should-be process and related recommendations.
- Start with an implementation plan that includes actions needed, stakeholder responsibilities and timelines.