

Introduction: Navigating the public workforce system can be complex. In collaboration with the WIOA partners, scaleLIT selected Airtable as the implemented universal referral platform. Airtable is used in various ways to drive system accountability and collaboration. ScaleLIT, LWDA 9 (Hennepin-Carver County) One-Stop Operator (OSO), maintains the platform to ensure job seekers and businesses are connected to resources within the network.

Each onboarded organization can select 1-2 point(s) of contact to manage referrals on the platform. The purpose of this agreement is to document the agreement between those points of contact and the OSO for the following:

Partner Staff User responsibilities:

All Airtable-using Staff:

- Attend Airtable Onboarding and Training Session facilitated by the One-Stop Operator, scaleLIT
- **Notify OSO immediately if there is a change in points of contact**
- Attend Center-Level meetings for the referrals discussion

Receiving Staff:

- Receive and respond to referrals on Airtable within two (2) business days
- Assess referrals based on services of interest and conduct outreach to customers
 - Staff must make three (3) outreach attempts to referred customers, e.g., email, voicemail, and/or text, within the first two weeks of receiving the referral.
- Update the status of received referrals and add relevant notes and comments.
- Mark referrals as closed or completed in a reasonable amount of time.
 - Referrals without customer response or engagement should be marked as *referral closed* after the third attempt is made.
 - See pages 15-18 of the Airtable User Guide for more information.

Sending Staff:

- Send referrals with appropriate customer information and referral notes
- Check the status(es) of sent referral(s) via the Interface and engage with receiving partners as necessary with comments.

One-Stop Operator responsibilities:

- Maintain Referral Forms, Airtable Referrals System, and tools with any necessary changes
- Provide monthly reports at partner meetings or upon partner email requests.
- Host weekly office hours for continuous technical support and training for partners
- Respond to Airtable tags from partners

Data privacy: All referral data is collected [via FillOut forms](#). ScaleLIT has invested in paid business levels for Fill Out and Airtable to protect our referral data. The one-stop operator archives and saves referral data by program year. If any organization needs a referrals data

report from Airtable, please contact the OSO team below or attend weekly Airtable Table Office hours to request the report.

[Click here to view scaleLIT's general PII Policy](#)

Termination: If an organization has been actively receiving referrals or has had pending referrals without action for 30 days or more, it will receive a written warning via email that the organization's accounts will be demoted to *read-only* two weeks after the date of the written warning to take action and resolve pending referrals.

Suppose the organization's points of contact have had no activity in Airtable for 3 months due to not receiving referrals. In that case, the one-stop operator will lower Airtable access from *Editor* to *Read Only*.

Airtable charges \$22 per Editor-level user per month, and this is paid for with 1A and 1D WIOA dollars.

Changes to agreement: The content of this agreement will be reviewed annually, and Airtable users will be notified of any changes via email and Disco.

Contact information: Please contact ema@scalelit.org if you have any questions or concerns about the agreement before signing.

Printed First and Last Name: _____

Partner Organization Name: _____

Signature: _____

Date of Agreement: _____