

BUSINESS SERVICES REQUIREMENTS

PURPOSE

This policy mandates Business Services program requirements for Workforce Development Board of Ventura County (WDBVC) and its contractors, subrecipients, and service providers.

The purpose of this policy is to guide each WDBVC contractor, subrecipient, and service provider, and its respective business services staff, in its employer engagement activities, business strategy, and connection of skilled workers to vacant jobs. This directive sets forth the required elements that each WDBVC contractor, subrecipient, and service provider will be responsible for tracking and reporting, as well as the mandatory outreach and engagement with businesses that must be conducted.

The required performance measures under this directive are summarized as follows:

- Retention with the Same Employer
- Repeat Business Customers

This policy supersedes Local Policy Bulletin #2021-01 Business Services Requirements, dated December 9, 2021. Retain this policy until further notice.

SCOPE

The Workforce Development Board of Ventura County (WDBVC) and its contractors, subrecipients, and service providers.

REFERENCES

- WIOA, Public Law 113-128
- Training and Employment Guidance Letter (TEGL) 10-16 (PDF), Subject: Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs
- Workforce Services Directive (WSD) 19-03 (PDF), Performance Guidance

POLICY

Local Workforce Development Boards must better align with economic development, local business and industry, and education to create a collective response to economic and labor market changes on the national, state and local levels. The WDBVC must adhere to provisions that decree business engagement and the alignment and realignment of training programs to meet the employment demands and dynamic needs of high-growth industries. The Ventura County workforce development system must contribute to economic growth and business

The Workforce Development Board of Ventura County is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.

expansion by ensuring the emphasis of business services is job-driven, matching business with skilled individuals.

All WDBVC contractor, subrecipient, and service provider business services staff must collaborate and coordinate all County-funded business services activities with co-located, local, and regional workforce partners and their respective business services staff as appropriate and as directed by the WDBVC. Further, all WDBVC contractor, subrecipient, and service providers are mandated to register each business they interact with in Launchpad, including the Employer Activity they have provided to said business.

Definitions of Employer Activities can be found in the latest CalJOBS Activity Codes Directive: https://edd.ca.gov/Jobs_and_Training/pubs/wsd19-06att1.pdf

The WDBVC contractors, subrecipients, and service providers must meet the Effectiveness in Serving Business Accountability Measures by providing the business services outlined in this directive. These measures are different than other performance measures in that they are not calculated for each program individually, but rather all data from the core programs are aggregated to produce one State-level figure.

Per TEGL 10-16, Change 1, DOL will finalize the employer measures “no later than the beginning of Program Year 2019.” This guidance will be updated if necessary when the finalized guidance from DOL is issued. It has been determined the best solution on guidance and data collection for this measure, until the pilot is concluded, is a solution that (1) does not incur any additional costs to the state, and (2) minimizes the impact to Local Areas. All business services staff must track employer services in Launchpad.

Performance Measures

Retention with the Same Employer

The Retention with the Same Employer measure determines if WIOA core programs are serving the State’s employers by improving employee workforce skills and reducing employee turnover.

The State must report Retention with the Same Employer in the second quarter and fourth quarter after exit, and calculate it based on wage data for participants who are in the fourth quarter after exit. To be included in the calculation, a participant must have a wage record match with the same employer State Tax ID number for the second and fourth quarters after exit, or supplemental wages with the same Federal Employer Identification Number (FEIN) in the second and fourth quarters after exit.

The number of participants with wage data who exit during the reporting period and were employed by the same employer during the second and fourth quarters after exit (numerator) DIVIDED BY the total number of participants with wage records who exit and were employed during the second quarter after exit (denominator). For example:

$$\frac{\text{\# employed by same employer in Q2 \& Q4}}{\text{Total \# who exited and were employed in Q2 after exit}} = \text{Retention with Same Employer}$$

Repeat Business Customers

The Repeat Business Customers measure tracks the percentage of employers who have used qualifying core program services in the current PY, and had received services in any of the three preceding PYs. This allows the State to determine if business customers are sufficiently satisfied to seek core program services again, and to develop and maintain durable employer relationships.

The total number of Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages (QCEW) establishments served during the current reporting period, and who have used qualifying core program services in the current PY and in any of the three previous reporting periods (numerator) DIVIDED BY the total number of establishments served during the current reporting period (denominator). For example:

$$\frac{\text{\# establishments served in prior 3 report periods}}{\text{Total \# of establishments served}} = \text{Repeat Business Customers}$$

Note the following:

- An employer who uses WIOA core program services more than once during the last three reporting periods is only counted once in reporting.
- DOL is not requiring States to use data for services delivered to employers prior to July 2016 to fulfill the prior three reporting periods' requirement.
- For employers with more than one physical location, each location is counted as a separate establishment (TEGL 10-16, Change 1, Attachment 4, Table A) (PDF).
- Qualifying "Core Services" are defined in TEGL 10-16, Change 1, Attachment 4, Table B (PDF).

WDBVC Business Engagement

The WDBVC is centrally coordinating and supporting countywide business engagement to better address industry needs using business data and intelligence. The WDBVC will develop and implement countywide demand driven workforce and economic policies and initiatives; and lead or coordinate business/industry commitments that require system wide, regional, or scaled coordination.

The WDBVC will be responsible for County-wide business outreach and engagement. WDBVC staff will coordinate with its contractors, subrecipients, and service providers to handover businesses for job seeker coordination.

Business Services Staff Requirements

Business Services staff must continue to engage with the business community through other means of networking and outreach, including but not limited to: industry councils, training events, networking events, and resource fairs. It is incumbent upon each business services staff to proactively identify employer demands and reach out to the business community to provide services and link businesses with vacancies to work-ready individuals.

To reduce employer visit fatigue, business services staff shall verify in Launchpad if that business has already been engaged. If a business has already been engaged, business services staff shall coordinate with the contractor, subrecipient, or service provider who served the business last.

Business Needs Assessment

At the point of business engagement, a Business Needs Assessment form (Attachment I) must be utilized to evaluate the current and future workforce planning, talent management, and business hiring needs of each business outreached to. The Business Needs Assessment must be completed in Launchpad.

Business Services Resource Proposal

After the business has been engaged and needs are determined, a Business Services Resource Proposal e-mail will be sent to the employer (Attachment II). It must be used to document the solutions proposed for the business. A copy of the Business Services Resource Proposal e-mail must be provided to the business and uploaded into Launchpad. The e-mail can also be sent directly from Launchpad.

Business services staff shall ensure that services being presented to businesses—from across partners—are not siloed or menu-driven but focus on delivering solutions to expressed business needs.

Creating an Employer Account

First, create a New Account in Launchpad. An account is defined as a business on Launchpad. Please refer to Launchpad Help Sheet 2 - How to Create a New Account (Attachment III). The staff who creates the account on Launchpad will be responsible for managing/maintaining the account/relationship. All contact with this account will go through this staff.

How to Add Employer Services

When an Employer Service has been provided, the staff must record the Employer Activity Code(s) in Launchpad. Along with entering the Employer Activity Code, the staff is required to document and provide additional detailed information regarding the Employer Activity provided by completing the Comments field in Launchpad. Please refer to Attachment IV (How to Add Employer Services).

Follow-up

Appropriate follow-up shall be provided to businesses. Business services follow-up includes, but is not limited to:

- Checking on results, including data collection
- Assessing employer satisfaction
- Inquiring about future needs
- Building and maintaining the relationship

Follow-up services shall be documented in Launchpad using employer activity codes, document management, and case notes.

Launchpad

This directive puts forth the mandatory use of the Launchpad Customer Relationship Management (CRM) System for WDBVC's America's Job Centers of California (AJCCs) and service providers where Business Solutions Services are administered. The designated Business Service staff and affiliated partner program staff at these sites are required to use Launchpad. The focus of Launchpad is to improve informational organization, enhance communication, improve customer service, automate everyday tasks, increase efficiency, and improve analytical data and reporting. The end goal is to engage and have an available pool of reentry friendly employers, who are willing to hire and work with the reentry population.

It is critical that staff input all critical metrics data (i.e., outreach activities, connections, meetings, and wins in Launchpad).

- Outreach activities are defined as any attempts to engage with the business (e.g. phone calls, e-mails and any other form attempted to connect with a business).
- Connections are conversations and/or any mutual engagements because of the outreach activities with the business that lead to an actual phone conversation, e-mail engagement, networking events, etc.
- Meetings are face-to-face appointments scheduled to assess the business' needs and/or provide services.
- WDBVC will track wins which are defined as any service provided beyond outreach activities, connections, and meetings. Examples include, but are not limited to, providing business services, job orders and/or the hiring of our reentry population. Capturing these

metrics is crucial, because measuring the number of outreach activities, connections, meetings and wins that the staff record gives the WDBVC a baseline understanding of effort and productivity towards ultimately meeting their performance. This will help identify any inefficiencies or gaps, where additional training or resources may be needed.

Monitoring

The standard monitoring requirements will be through annual site visits or review of the Launchpad system, and quarterly self-reporting of performance through the forms listed above.

Contractors, subrecipients, and service providers are required use the Launchpad to track employer engagements, services provided, and other data regarding services. Each WDBVC contractor, subrecipient, and service provider is responsible for updating Launchpad in real time such that WDBVC may generate a report to monitor progress at any time.

ACTION

Bring this policy to the attention of all affected staff.

INQUIRIES

Inquiries regarding this policy can be addressed to the WDBVC at 805-477-5306.

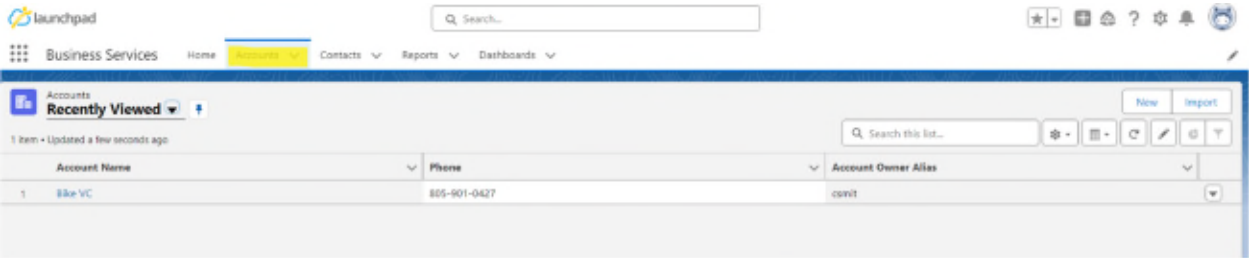
/S/ Rebecca Evans, Executive Director
Workforce Development Board of Ventura County

ATTACHMENTS:

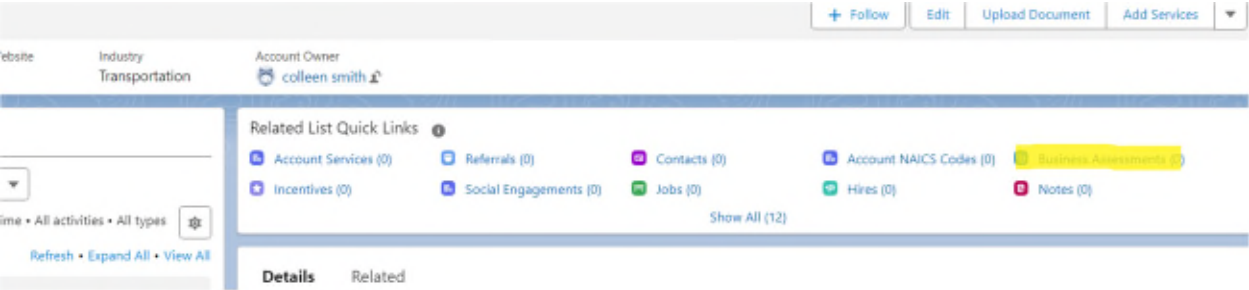
- Attachment I - Business Needs Assessment
- Attachment II - Business Services Resource Proposal
- Attachment III - How to Create a New Account
- Attachment IV - How to Add Employer Services

Business Needs Assessment

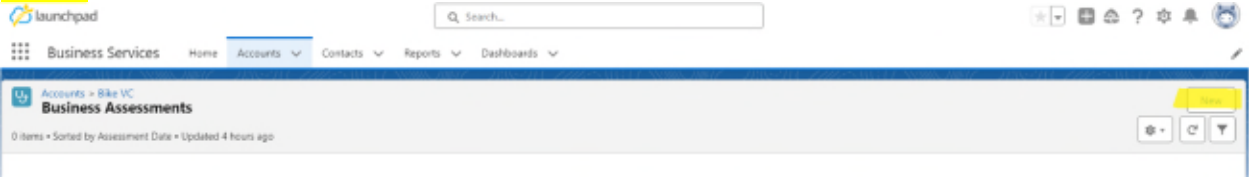
STEP 1: Engage with the employer either in person, virtually or on the phone and have assessment ready. Go to the Accounts tab and select the business you wish to complete the form for.



STEP 2: Select Business Assessments



STEP 3: Select New



STEP 4: Complete the Business Assessment in its entirety

Home

Search...

New Business Assessment: Follow Up

Business Needs Assessment

*Account

Contact Initiated by:

Form Completed

Business Information:

*Contact

*Phone

*CallIOBS Account

*Received or Receiving Services?

*Business planning to expand or downsize

*If expanding or downsizing, how soon?

*Are you currently hiring?

*What is the Minimum Education

How long has your business operating?

*Do you plan to re...

Cancel Save & New Save would be beneficial

STEP 5: Click save to save the assessment

How many Part-time employees business

Full time employees Business have?

Reading Comprehension

Other Competencies. Please state them

Do your employees need training?

If yes, in which areas?

Do you provide training to employees?

If Yes, What type?

Follow-Up Services

Recommend our services to other business

Beneficial to know how other business do

You participate Business advisory council

Cancel Save & New Save

Business Solutions Resource Proposal

Subject Line: Business Solutions Proposal - XYX Company

Dear [Recipient],

I appreciate the opportunity to meet with you today to explore Business Solutions Services tailored to your business's specific needs. As per our discussion, below is a summary of our conversation along with the proposed services that our Business Solutions team can offer.

Business Services Resource Proposal

Date:	
Employer Legal Business Name:	
Address: (City, State, Zip Code)	
Contact Person:	
Phone:	
E-mail:	
Summary of Services Proposed with Timelines: (Ex: Hiring Event 3/25/2024)	

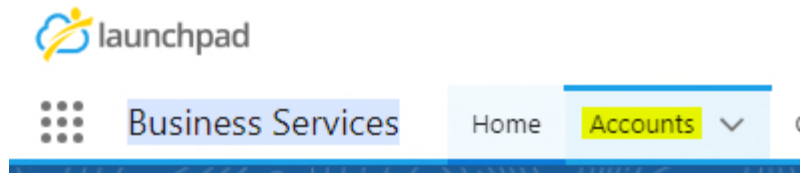
I look forward to further discussing how these solutions can benefit your business. Please feel free to reach out if you have any questions or if there are additional details you would like to explore.

Thank you.

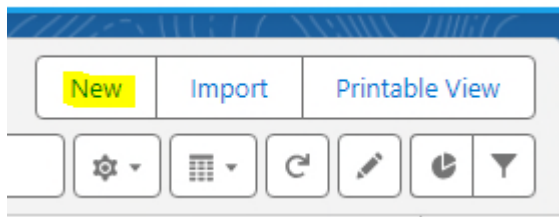
[Signature]

How to Create an Employer Account

STEP 1: Make sure to be in the Accounts tab



STEP 2: Click New



STEP 3: Add the employer's name and address if available. Once the information has been entered, click save

New Account: Employer

* = Required Information

Account Information

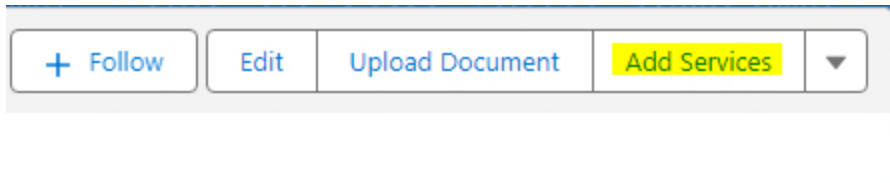
<p>Account Name <input type="text" value="Test"/></p> <p>Parent Account <input type="text" value="Search Accounts..."/></p> <p>Industry <input type="text" value="--None--"/></p> <p>Phone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>Description <input type="text"/></p>	<p>Account Record Type <input type="text" value="Employer"/></p> <p>Active <input checked="" type="checkbox"/></p> <p>Account Owner <input type="text" value="Rebeca Ochoa"/></p> <p>Account Source <input type="text" value="--None--"/></p> <p>Website <input type="text"/></p>
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Address Information

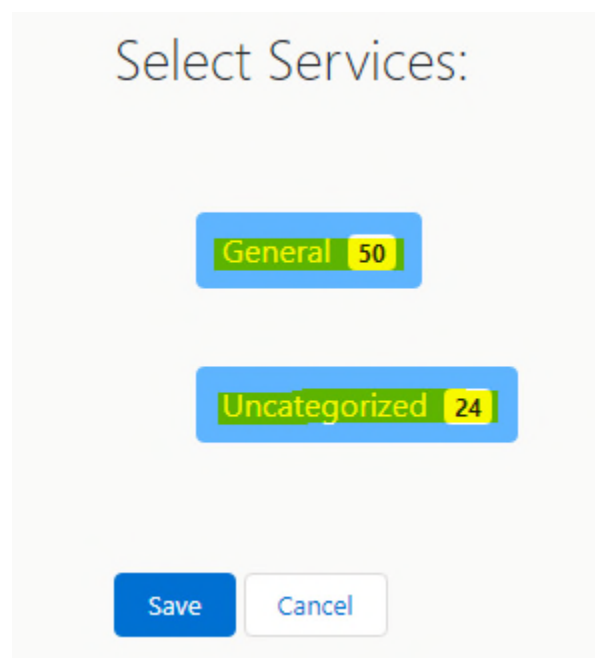
<p>Billing Address</p> <p><input type="text" value="Search Address"/></p> <p>Billing Street <input type="text"/></p> <p>Billing City <input type="text"/> Billing State/Province <input type="text"/></p>	<p>Shipping Address</p> <p><input type="text" value="Search Address"/></p> <p>Shipping Street <input type="text"/></p> <p>Shipping City <input type="text"/> Shipping <input type="text"/></p>
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How to Add Employer Services

STEP 1: Once a new employer has been created, you will be prompted to the Employer Profile to the left. You will click “Add Services”



STEP 2: Click on either category to add services and click save



STEP 3: Once you’ve clicked save, you will be prompted back to Employer Profile. Click on Account Services (In the related list quick links Tab)

Related List Quick Links

 Account Services (0)

STEP 4: All services that have been added will be listed

Accounts > Test
Account Services New

6 Items • Sorted by Date of Service • Updated 2 minutes ago ⌵

<input type="checkbox"/>	Account Service: Account Service Number	Service Name	Assigned	Status	Date of Service ↓	
1	<input type="checkbox"/> Account Service 86	Bonding		Not Started	1/31/2024	⌵
2	<input type="checkbox"/> Account Service 87	Employer Networking		Not Started	1/31/2024	⌵
3	<input type="checkbox"/> Account Service 88	Engaged In Strategic Planning/Economic Development		Not Started	1/31/2024	⌵
4	<input type="checkbox"/> Account Service 89	Targeted Recruitment		Not Started	1/31/2024	⌵
5	<input type="checkbox"/> Account Service 90	Job Development Contact		Not Started	1/31/2024	⌵
6	<input type="checkbox"/> Account Service 91	Job Listing Assistance		Not Started	1/31/2024	⌵

STEP 5: Click on the arrow drop down to Edit located on the far left of Account Services



STEP 6: Finalize the Status of the service, date of service, and name of the person who assigned the service and save

Edit Account Service 86

* = Required Information

Account Service Number	Account Service 86	*Status	Not Started
Account	Test	*Date of Service	1/31/2024
*Service	Bonding	*Assigned	Search People...
Contact	Search Contacts...		
Comments	<input type="text"/>		

System Information

Created By Rebeca Ochoa, 1/31/2024, 2:00 PM Last Modified By Rebeca Ochoa, 1/31/2024, 2:00 PM

[List of Services](#)

Definitions of Employer Activities can be found in the latest CalJOBS Activity Codes Directive: https://edd.ca.gov/Jobs_and_Training/pubs/wsd19-06att1.pdf