LOCAL POLICY BULLETIN #2023-05
Effective Date: February 22, 2024

BUSINESS SERVICES REQUIREMENTS

PURPOSE

This policy mandates Business Services program requirements for the 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 their respective business services staff, in their employer engagement activities, business strategy, and the connection of skilled workers to vacant jobs. This directive sets forth the required elements that each WDBVC contractor, subrecipient, and service provider must track and report, 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 expansion by ensuring that the emphasis of business services is job-driven and that businesses are matched 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 contractors, subrecipients, 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 differ from other performance measures in that they are not calculated for each program individually; instead, all data from the core programs are aggregated to produce a single 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 that the best solution for 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 on 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 assesses whether WIOA core programs are serving the State’s employers by improving employees' skills and reducing employee turnover.

The State must report Retention with the Same Employer in the second and fourth quarters after exit, and calculate it based on wage data for participants 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:

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

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 have 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 that 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:

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

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 hand over 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 member to proactively identify employer needs and reach out to the business community to provide services and connect businesses with vacancies with work-ready individuals.

Launchpad is the Workforce Development Board of Ventura County's centralized system for tracking employer engagement, job orders, and staff activities. It serves as the primary tool for documenting all Business Services Representative (BSR) interactions with employers, including outreach, referrals, and training documentation. Launchpad ensures consistency, accountability, and transparency across business services activities, providing leadership and program staff with real-time access to the information necessary to monitor performance, support compliance, and make data-driven decisions. All BSRs are expected to enter accurate and timely information into Launchpad in accordance with established SOPs. Monthly reports generated from Launchpad will be received by managers and should be reviewed and assessed for appropriate follow-up with their staff.
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 that most recently served the business.

Business Needs Assessment

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

. 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 other communication should be initiated through the account owner. If the account owner is no longer with the partner organization, a new BSR may designate themselves as the new account owner.

How to Add Employer Services

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

Business Services Resource Proposal

After a business has been engaged and its needs have been identified, a **Business Services Resource Proposal** will be sent to the employer (Attachment II). The proposal can be included **as an attachment or directly in the body of the email**. It must be used to document the solutions proposed for the business.

A copy of the Business Services Resource Proposal must be provided to the business and either uploaded to Launchpad or entered into Launchpad. The email can also be sent directly from Launchpad.

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 mandates the 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 (e.g., 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 to use the Launchpad to track employer engagements, services provided, and related data. 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

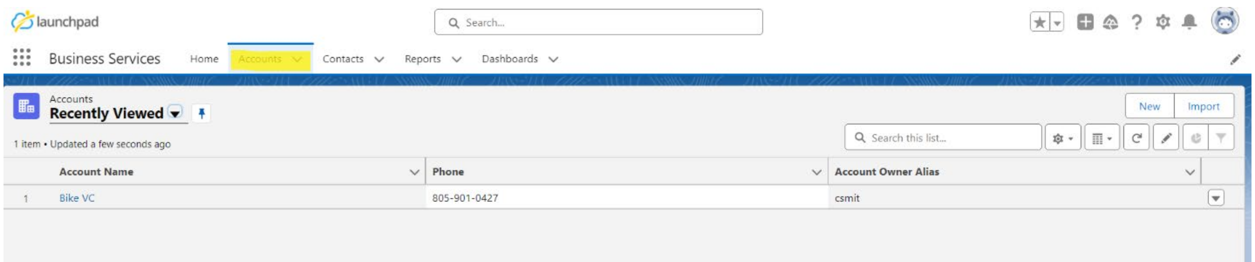
ATTACHMENTS:

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

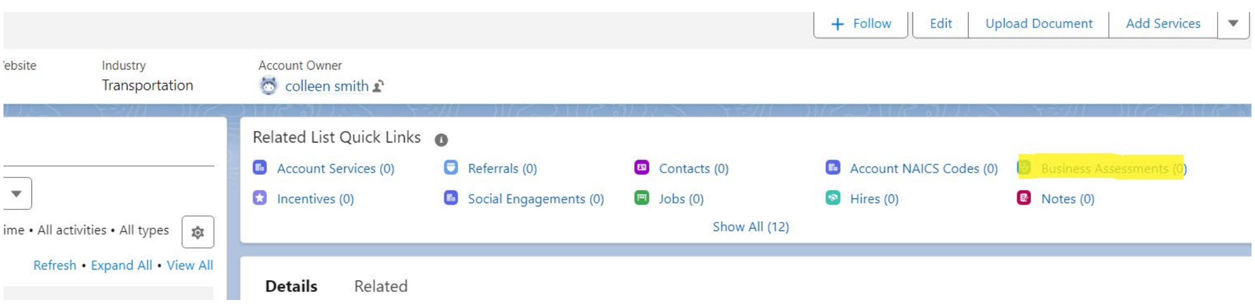
Attachment IV - How to Add Employer Services
Attachment V - Standard Operating Procedures

Business Needs Assessment

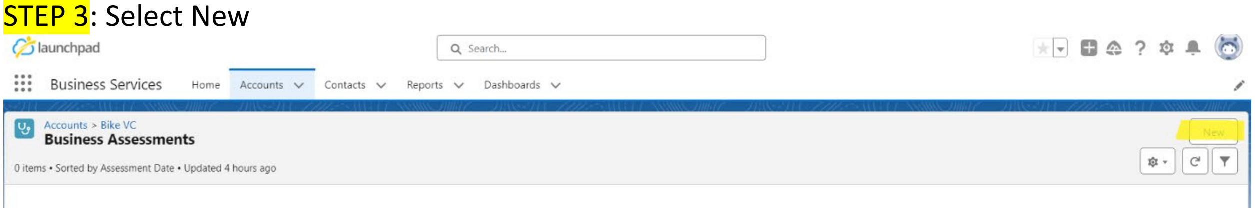
STEP 1: Engage with the employer either in person, virtually or on the phone and have assessment ready. Go to the Accounts tab and select the business you wish to complete the form for.



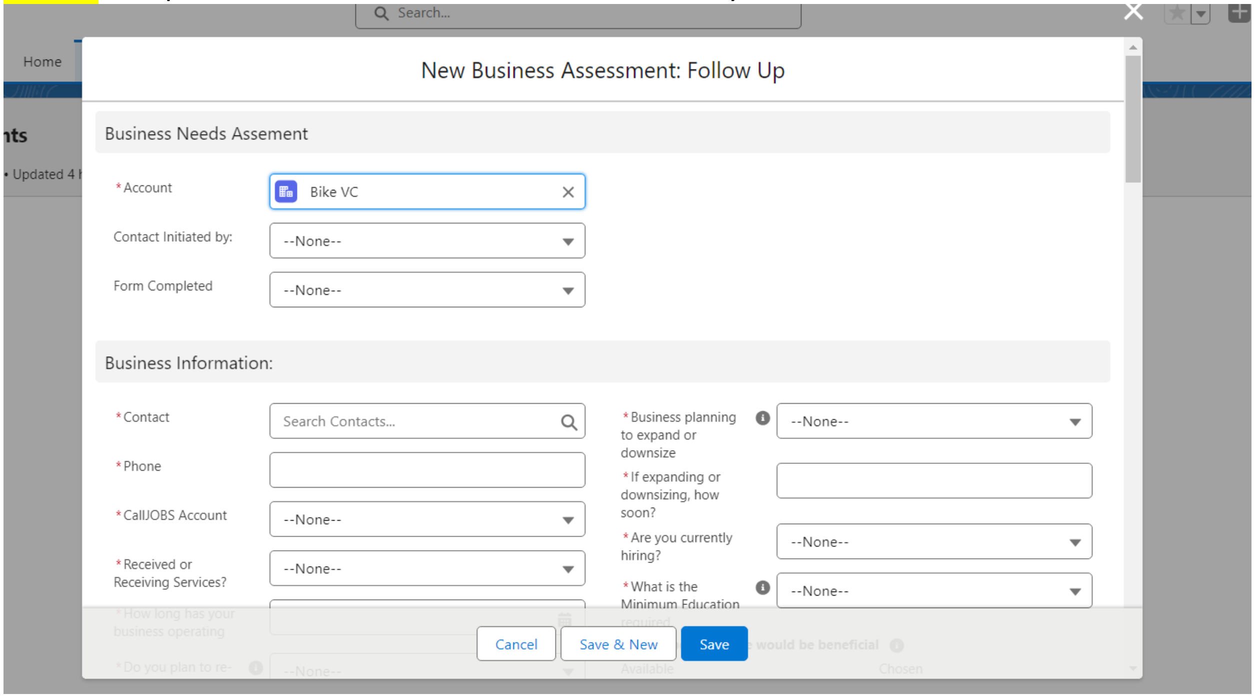
STEP 2: Select Business Assessments



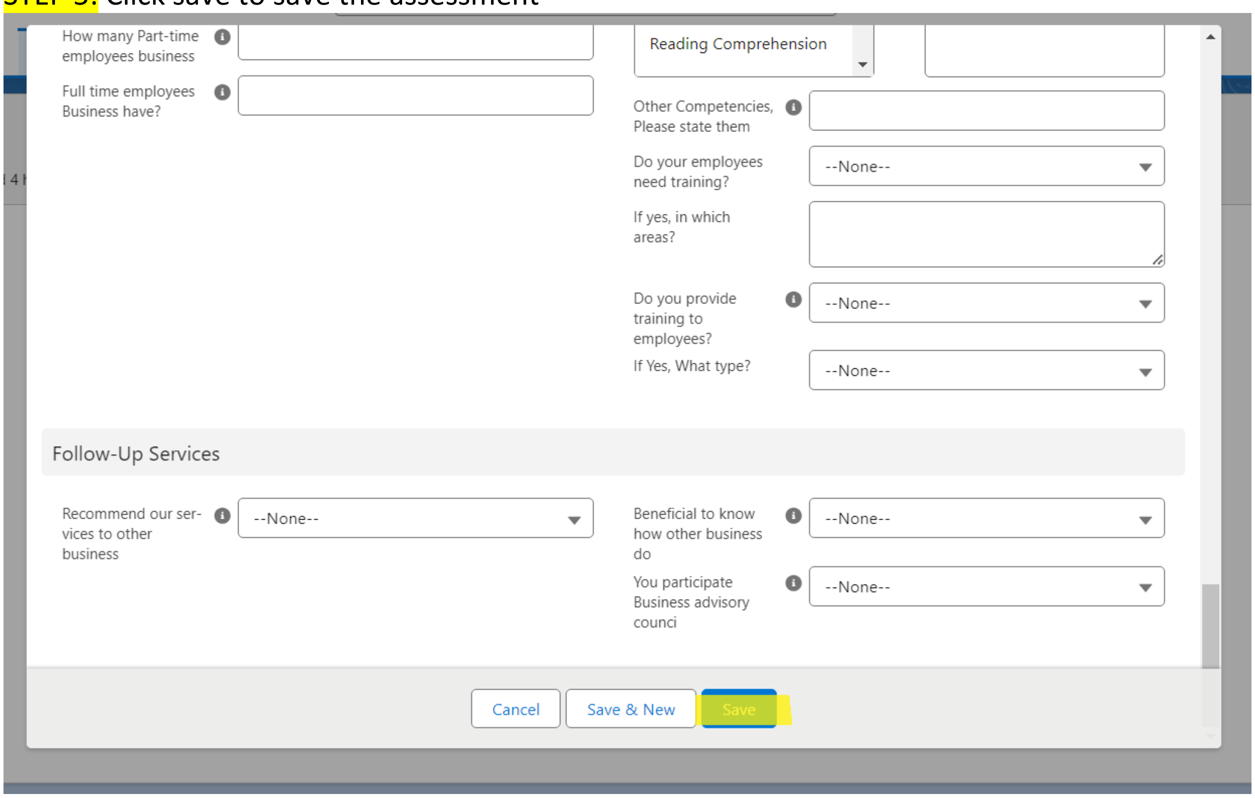
STEP 3: Select New



STEP 4: Complete the Business Assessment in its entirety



STEP 5: Click save to save the assessment



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)	

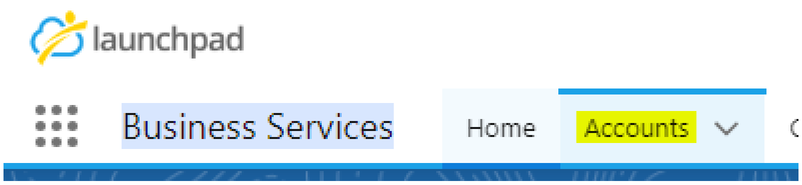
I look forward to further discussing how these solutions can benefit your business. Please feel free to reach out if you have any questions or if there are additional details you would like to explore.

Thank you.

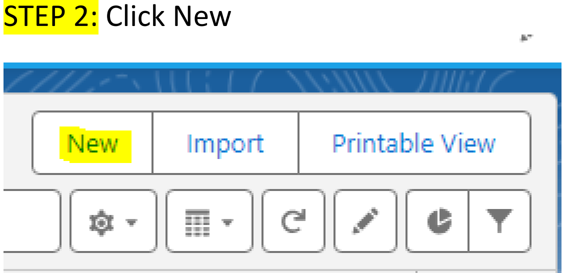
[Signature]

How to Create an Employer Account

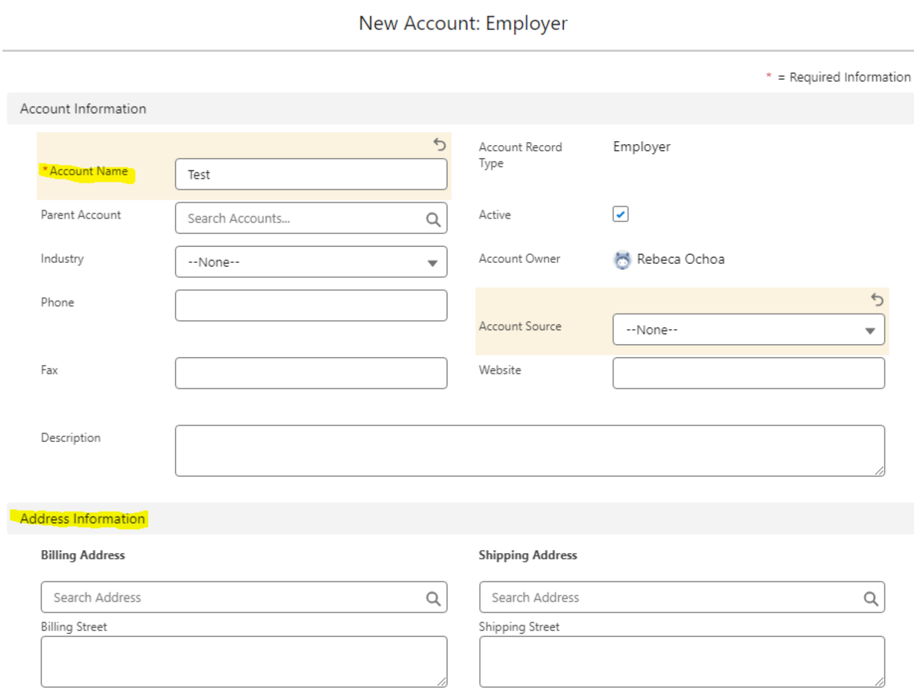
STEP 1: Make sure to be in the Accounts tab



STEP 2: Click New

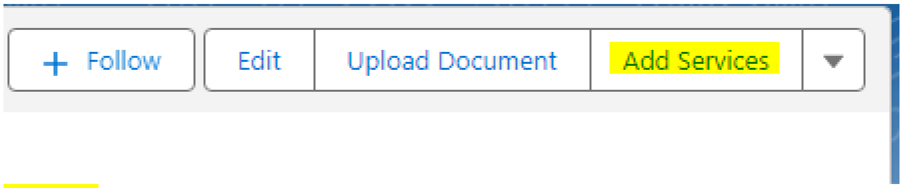


STEP 3: Add the employer's name and address if available. Once the information has been entered, click save

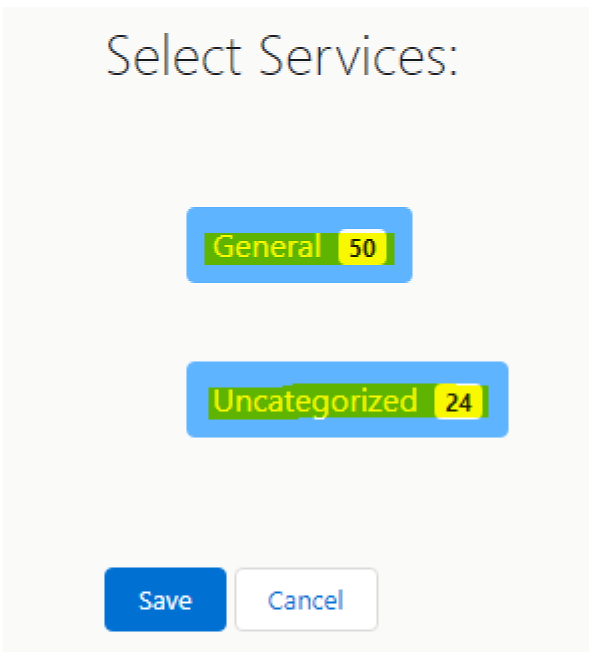


How to Add Employer Services

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"

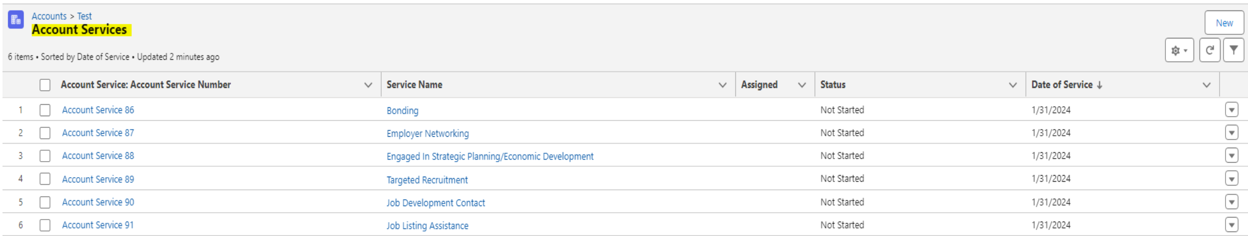


STEP 2: Click on either category to add services and click save

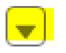


STEP 3: Once you've clicked save, you will be prompted back to Employer Profile. Click on Account Services (In the related list quick links Tab)

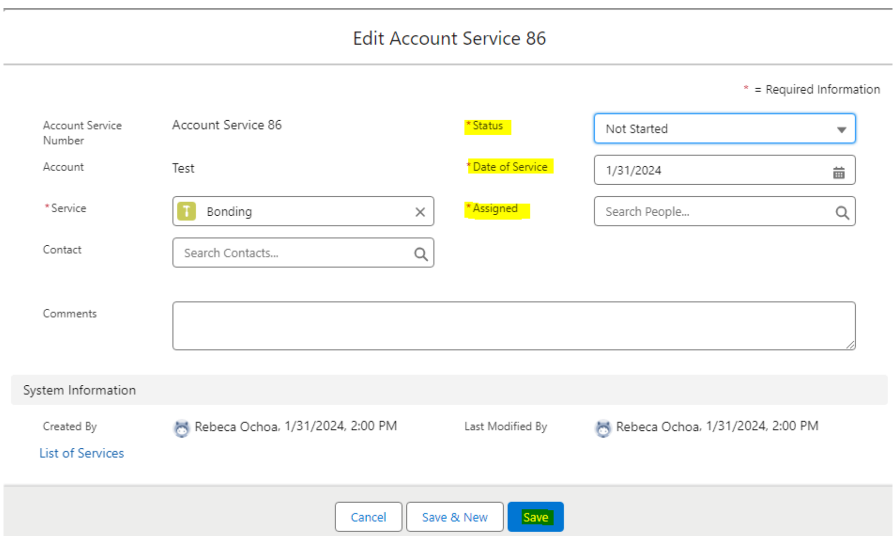
STEP 4: All services that have been added will be listed



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



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

Workforce Development Board of Ventura County (WDBVC) Business Service Representatives (BSR) Standard Operating Procedures (SOP) Manual

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SECTION I: Standard Operating Procedures (SOP) – BSR Training

PURPOSE

To provide structured guidance for onboarding, ongoing training, and professional development of Business Solutions Representatives (BSRs) to ensure consistency, knowledge retention, and high-quality service delivery.

SCOPE

This SOP applies to all current and new BSRs, as well as management and training staff responsible for facilitating or coordinating training activities within WDBVC programs.

RESPONSIBILITIES

Business Services Representatives (BSRs) are responsible for actively participating in all required onboarding and ongoing training sessions. BSRs must review and follow the new employee training plan to ensure timely completion of all required learning activities.
BSRs are expected to apply the knowledge and skills gained through training to their daily work, including employer outreach, employer engagement, accurate data entry, and participation in business-focused events. Ongoing application of training supports service quality, consistency, and compliance with program requirements.

Management is responsible for providing appropriate training resources, schedules, and ongoing support to ensure BSRs can successfully complete all required onboarding and continuing training.

Management will also monitor training completion and assess training effectiveness through performance reviews, observation, and measurable outcomes to ensure staff are prepared to meet program and service delivery expectations.

Workforce Development Board of Ventura County (WDBVC) staff are responsible for developing, delivering, and regularly updating BSR training content to ensure alignment with workforce policies, system priorities, and regulatory requirements.

WDBVC staff will also provide guidance, technical assistance, and support to help BSRs effectively apply training concepts in the field and support consistent, high-quality employer engagement across the workforce system.

ONBOARDING/ INITIAL TRAINING PLAN

All Business Services Representatives (BSRs) will receive training that provides a clear overview of their roles, responsibilities, and performance expectations. This training ensures consistent understanding of job duties, service standards, and accountability measures.
The training will also include an introduction to the organizational structure, WIOA partner programs, and core employer engagement principles. BSRs will learn how business services align with partner roles, referral processes, and integrated service delivery to support employers effectively and consistently across the workforce system.

SYSTEM TRAINING

Business Services Representatives (BSRs) will receive training on all required systems and tools, including Launchpad and CalJOBS. This training ensures accurate data entry, effective job posting, and compliance with reporting requirements.

BSRs will also be trained on the use of approved templates, checklists, and reporting tools to promote consistency, efficiency, and quality in employer engagement, documentation, and service delivery.

POLICIES AND PROCEDURES

Business Services Representatives (BSRs) will receive training on all relevant policies and procedures, including applicable SOPs for employer engagement, job fairs, outreach activities, and issue resolution procedures.

This training ensures BSRs understand and consistently follow established processes, maintain compliance, and deliver high-quality services across all business service activities.

ACCESSIBILITY & INCLUSIVITY TRAINING

All Business Services Representative (BSR) training materials must meet ADA accessibility standards and be accessible to all staff. Training content shall be provided in accessible formats, using inclusive design principles to ensure equal access for individuals with disabilities.

BSR training will also include cultural competency components to support effective and respectful employer engagement. This includes awareness of diverse business cultures, service delivery practices, and strategies for communicating with employers from varied industries, backgrounds, and communities.

TECHNOLOGY & SECURITY

All staff must follow established data security and confidentiality protocols when using Launchpad and handling employer data. Access to sensitive information is limited to authorized users based on role and job function. Only required information may be entered into approved systems, and data may not be shared, stored, or transmitted through unsecured methods.

All systems must comply with applicable data protection requirements. Any suspected data breach, phishing attempt, or unauthorized access must be reported immediately in accordance with incident response procedures. All staff are required to complete regular data security, privacy, and cybersecurity awareness training, including phishing prevention and password management best practices.

PERFORMANCE BENCHMARKS

After onboarding, Business Services Representatives (BSRs) must demonstrate the following minimum competencies:

- **Launchpad Proficiency:** Ability to accurately enter, update, and manage employer information, activities, and services in Launchpad in accordance with data and security standards.
- **Job Board Posting Accuracy:** Ability to create, post, and manage job listings that are complete, accurate, and aligned with employer needs and program requirements.

- **Employer Engagement:** Demonstrated understanding of employer services and the ability to communicate offerings clearly and professionally.
- **Data Compliance:** Adherence to data security, confidentiality, and documentation requirements.

Competency may be verified through observation, system review, or supervisor assessment prior to independent service delivery.

Completion of required training is tied to measurable performance outcomes. BSRs are expected to demonstrate proficiency through the following key performance indicators (KPIs):

- **Employer Satisfaction:** Positive employer feedback and satisfaction ratings following service delivery.
- **Timely Data Entry:** Accurate entry of employer activities, services, and job postings in Launchpad within required timeframes.
- **OJT Outcomes:** Successful development, execution, and documentation of On-the-Job Training (OJT) agreements in compliance with program requirements.

Ongoing performance against these KPIs will be monitored to confirm training effectiveness and identify needs for additional coaching or support.

CROSS TRAINING

Business Services Representatives (BSRs) will participate in cross-training activities that provide exposure to other WIOA roles, including case managers and career planners. This cross-training is designed to promote a holistic understanding of the WIOA system, partner roles, and integrated service delivery.

Through job shadowing, joint meetings, and collaborative training sessions, BSRs will gain insight into participant eligibility, case management processes, and referral workflows. This understanding supports effective referrals, improved coordination, and seamless service delivery between business and career services teams.

EMERGENCY & CRISIS RESPONSE

- Guidance on employer communication during disasters or layoffs. Business Service Representatives shall follow established protocols when communicating with employers during emergencies, disasters, layoffs, and other crisis situations. This includes providing timely, accurate information regarding available workforce resources, rapid response services, layoff, and reemployment support.
- BSRs must coordinate with WDBVC leadership, and Rapid Response teams to ensure consistent messaging and appropriate referrals. All employer communications in rapid response must be documented in Launchpad.

CONTINUOUS LEARNING RESOURCES

Business Services Representatives (BSRs) are encouraged to participate in ongoing professional development to maintain current knowledge of workforce trends and best practices. Recommended external training opportunities include National Association of Workforce Boards

(NAWB) webinars, Workforce GPS, regional and national workforce conferences, and other relevant industry trainings.

BSRs are also encouraged to pursue professional certifications related to Business Services and Workforce Development, as appropriate. Participation in external trainings and certifications supports continuous skill development, strengthens service quality, and enhances overall workforce system effectiveness.

ONGOING TRAINING

Training for Business Services Representatives (BSRs) will be conducted on a regular basis to ensure skills remain current and aligned with program needs.

Frequency: Training sessions will be held monthly or quarterly, as needed, to address policy updates, emerging trends, system changes, or identified skill gaps.

Additional ad-hoc sessions may be scheduled to address urgent updates, new tools, or critical compliance requirements.

This approach ensures ongoing professional development and continuous improvement in service delivery.

Content: Ongoing training for Business Services Representatives (BSRs) will cover key areas to enhance skills, ensure compliance, and support effective service delivery. Training content includes:

- **Advanced Employer Engagement Strategies:** Techniques for relationship-building, needs assessment, and tailored service delivery.
- **Data Management Best Practices:** Accurate data entry, reporting, and system use, including Launchpad, job boards, CalJOBS, EconoVue, and Lightcast.
- **Event Planning and Coordination Updates:** Guidance on organizing and managing job fairs, focus groups, and other employer-focused events.
- **Partner Organization Collaboration and Referral Procedures:** Best practices for working with WIOA partners and other stakeholders to ensure integrated service delivery.
- **Compliance, Privacy, and Organizational Updates:** Review of policy changes, regulatory requirements, and organizational procedures, including cybersecurity and data privacy standards.

This structured ongoing training ensures BSRs remain proficient, compliant, and effective in all aspects of their role.

Delivery Methods: Ongoing training for Business Services Representatives (BSRs) will be delivered using a variety of methods to accommodate different learning styles and operational needs. Delivery methods include:

- **In-Person Sessions:** Interactive classroom-style training for hands-on learning and group collaboration.
- **Virtual Meetings:** Live online sessions to provide flexibility and real-time engagement for remote staff.
- **Workshops:** Focused, skill-based sessions for practical application of tools, systems, and employer engagement techniques.
- **Self-Paced Modules:** Online or offline learning modules that allow BSRs to complete training independently at their own pace.

This blended approach ensures accessibility, flexibility, and effective knowledge transfer across all staff.

MENTORING & PEER SUPPORT

All new Business Services Representatives (BSRs) will be assigned a mentor for the first 90 days to provide guidance, support, and on-the-job learning. Mentors assist with employer interactions, accurate data entry, problem-solving, and application of training concepts in real-world scenarios.

Peer-to-peer knowledge sharing is also encouraged through team meetings, debriefs, and collaborative discussions. This approach fosters a supportive learning environment, reinforces best practices, and promotes continuous professional growth among all BSR staff.

TRAINING DOCUMENTATION & TRACKING

The **Partner Compliance Training Dashboard** will be maintained for each Business Services Representative (BSR) to document all training activities. The log will include:

- Completed training sessions and modules
- Dates of training and names of trainers or facilitators
- Assessment scores or documented demonstration of competencies

Management will review these training logs on a **quarterly basis** to ensure all staff have completed required trainings and are maintaining proficiency in their roles. This process supports accountability, compliance, and ongoing professional development.

EVALUATION & CONTINUOUS IMPROVEMENT

Training effectiveness will be continuously evaluated to ensure it meets the needs of Business Services Representatives (BSRs) and aligns with organizational goals.

- **Feedback Collection:** Solicit feedback from BSRs after each training session to identify areas for improvement in content, delivery, and relevance.

- **Content Updates:** Revise and enhance training materials, methods, and delivery approaches based on organizational priorities, partner input, or changes in systems, tools, and policies.

This approach ensures that training remains current, practical, and effective in supporting high-quality service delivery.

COMPLIANCE & ACCOUNTABILITY

Business Services Representatives (BSRs) are required to complete all mandated training within the designated timelines to ensure proficiency and compliance with program standards. Management is responsible for monitoring training completion and adherence to timelines. Support, coaching, or corrective actions will be provided as needed to address gaps, maintain quality standards, and ensure all BSRs are fully prepared to perform their roles effectively.

SECTION II: Standard Operating Procedure (SOP) – Launchpad Data Entry for BSRs

PURPOSE

To provide BSRs with clear guidance for entering employer and activity information into Launchpad, ensuring accurate, timely, and consistent data capture.

SCOPE

This SOP applies to all Business Solutions Representatives (BSRs) responsible for employer engagement, job sourcing, and recording interactions in Launchpad within the WDBVC's programs.

RESPONSIBILITIES

Business Services Representatives (BSRs) are responsible for accurate and timely data entry in Launchpad to support reporting, service delivery, and compliance. Responsibilities include:

- **New Employer Entry:** Enter all new employers into Launchpad with complete and accurate information
- **Activity Logging:** Record all employer-related activities, including meetings, outreach efforts, and participation in job fairs.
- **Job Order Recording:** Document all job orders submitted by employers, ensuring details are complete and current.

- **Data Accuracy and Completeness:** Verify that all entries meet organizational standards for accuracy, consistency, and completeness.

BSRs must adhere to data security and confidentiality protocols while performing these tasks, ensuring sensitive employer information is protected at all times.

Management Responsibilities
Management is responsible for overseeing Launchpad data entry and ensuring compliance with organizational standards. Responsibilities include:

- **Training and Resources:** Ensure all BSRs have access to the necessary training, tools, and resources to accurately enter and maintain data in Launchpad.
- **Compliance Monitoring:** Regularly monitor staff data entry for accuracy, completeness, and timeliness. This includes reviewing reports generated from Launchpad to identify errors, gaps, or trends, and providing feedback, support, or corrective actions as needed to maintain quality and compliance.

This oversight ensures that employer data is reliable, up-to-date, and aligned with organizational and program requirements.

DATA ENTRY PROCEDURES

New Employers-Information Gathering and Data Entry: Collect all required employer information, including company name, primary contacts, address, industry, and other relevant details and enter employer information into Launchpad using the standard data entry form, ensuring all fields are complete, accurate, and up to date.

BSRs must follow organizational standards for data accuracy and confidentiality when entering new employer information.

Employer Activities:
Log interactions, meetings, or outreach efforts with employers after they occur. Include notes on outcomes, follow-up actions, and referrals.
Job Orders:
Record all new job openings submitted by employers, ensuring position details, pay rates, and requirements are accurately captured.
Quality Checks:
All Job Order entries in Launchpad shall be reviewed for accuracy and completeness before being finalized. Staff are responsible for promptly updating or correcting any errors, omissions, or inconsistencies to ensure that each job order accurately reflects employer requirements, job details, and posting information. Regular quality checks maintain data integrity, support accurate reporting and tracking, and ensure that both job seekers and management have reliable information for service delivery and decision-making.

TRAINING AND SUPPORT RESOURCES

1. Visual Guide: Scroll to the bottom of the WDB Policy 2023-05 PDF for step-by-step pictures on adding employers and services:
   WDB Policy 2023-05
2. Video Tutorial: A prerecorded training video is available here:
   Launchpad Training Video
3. Visual Guide: Tutorial on entering jobs in Launchpad
   Launchpad Instructional Guide

DATA STANDARDS & COMPLIANCE

All Launchpad entries must adhere to established data standards and compliance requirements to ensure accuracy, confidentiality, and alignment with federal and state reporting obligations.

DATA PRIVACY & CONFIDENTIALITY

All staff are responsible for safeguarding sensitive information entered into Launchpad, including employer contact details and proprietary business information. Employer data may only be accessed and used for authorized workforce development purposes, and personally identifiable information (PII) must not be shared outside approved systems or with unauthorized individuals. All entries must comply with applicable data privacy policies, WIOA confidentiality requirements, and local security protocols to ensure the protection of employer and participant information at all times.

WIOA REPORTING REQUIREMENTS

To ensure compliance with Workforce Innovation and Opportunity Act (WIOA) reporting standards, staff must:

- Accurately capture Industry-Sector for all employer records to support industry-sector reporting.
- Ensure job orders reflect Equal Employment Opportunity (EEO) compliance, including non-discriminatory language and adherence to applicable labor laws.
- Enter complete and accurate data fields required for performance tracking, labor market analysis, and state/federal reporting.
- Review entries for consistency and completeness prior to submission to avoid reporting discrepancies.

REQUIRED FIELDS CHECKLIST

A mandatory fields list for employer profiles and job orders (e.g., company name, Federal Employer Identification Number (FEIN) if applicable, contact info, job title, wage range, Industry, # of employees) will be included to help prevent incomplete entries.

TIMELINESS STANDARD

Timely and accurate data entry in Launchpad is essential to maintain data integrity, ensure reporting accuracy, and support effective coordination of employer services. All employer interactions, services provided, and related activities must be entered into Launchpad within **one (1) business week** of the interaction. This standard applies to all Launchpad entries, including employer records, job orders, evaluations, notes, and follow-up activities, ensuring that information is complete, current, and accessible for monitoring, reporting, and decision-making purposes.

ACCOUNTABILITY & QUALITY ASSURANCE

Staff are responsible for ensuring that all entries in Launchpad are complete, accurate, and submitted within the required timeframe. Supervisors may conduct periodic reviews to monitor compliance with these timeliness and quality standards. Delayed or incomplete entries can lead to reporting discrepancies and may necessitate corrective actions or follow-up to maintain data integrity and ensure accurate employer service tracking.

ERROR CORRECTION PROTOCOL

Maintaining accurate records in Launchpad is critical to ensuring data integrity, audit readiness, and compliance with reporting requirements. When an error is identified in a Launchpad entry, staff must correct the information promptly. If system permissions do not allow a staff member to edit an entry, the Launchpad administrator and designated WDBVC staff must be contacted to make the correction. All corrections must be documented by adding a clear note in the comments or case notes section indicating:

- What information was corrected
- The reason for the correction
- The date the correction was made

Original records should not be deleted unless explicitly permitted by system policy, and all corrections should preserve historical accuracy to maintain a reliable record of employer interactions and services.

AUDIT TRAIL INTEGRITY

Proper documentation of corrections ensures a transparent audit trail and supports internal and external audits.

DUPLICATE PREVENTION

Preventing duplicate records in **Launchpad** is essential to ensure accurate reporting, efficient service delivery, and overall data reliability. Before creating a new employer record, staff must search Launchpad to determine whether a record for the employer already exists. Verification should include reviewing variations of the employer's name, address, and primary contact information to ensure that all interactions are linked to the correct existing record, reducing redundancy and supporting accurate tracking of employer engagement.

HANDLING POTENTIAL DUPLICATES

If a potential duplicate record is identified in Launchpad, staff must update the existing record rather than creating a new entry. Any suspected duplicates that cannot be resolved by staff should be reported to a supervisor or the WDBVC Launchpad administrator for review and resolution. This process ensures that all employer information remains accurate, reduces redundancy, and maintains the integrity of reporting and service tracking.

PERFORMANCE METRICS

Tracking performance metrics related to Launchpad data entry supports accountability, data quality, and effective employer service delivery.

The following metrics may be tracked as part of Business Solutions Representative (BSR) performance evaluation:

- **Data Accuracy Rate:** Percentage of Launchpad entries completed correctly and in compliance with data standards.
- **Timeliness:** Adherence to required data entry timeframes, including entry of employer interactions within one (1) business week.
- **Employer Activities Logged:** Number and completeness of employer engagements, services, and follow-up activities documented in Launchpad.

MONITORING & CONTINUOUS IMPROVEMENT

Supervisors may review performance metrics on a regular basis to identify trends, recurring issues, and opportunities for process improvement or staff training. Performance data can be used to support coaching, professional development, and ongoing quality improvement efforts, ensuring that staff maintain high standards in data entry, employer engagement, and service delivery.

INTEGRATION WITH OTHER SYSTEMS

Launchpad data may integrate with state systems, job boards, or other workforce platforms. Accurate and consistent data entry is critical to ensure reliable state reporting and system synchronization.

- Staff must ensure that information entered into Launchpad is accurate, complete, and consistent with data shared across integrated state systems and job boards.
- Key data elements, including employer details, job orders, NAICS codes, and EEO-related information, must be reviewed for accuracy prior to submission, as this information may be used for state and federal reporting purposes.

MONITORING & REVIEW

Ongoing monitoring and review of Launchpad entries are essential to ensure data quality, compliance, and accurate reporting of employer engagement activities.

- Management and WDBVC staff will periodically review Launchpad entries to assess accuracy, completeness, and timeliness.
- Reviews may include employer records, job orders, activities, evaluations, and follow-up documentation.

REPORTING & OVERSIGHT

Monthly **Launchpad reports** will be generated and distributed to management and relevant staff to provide a clear overview of employer engagement, job orders, services provided, and overall activity levels. These reports will be used to track performance, monitor operational trends, and support data-driven decision-making. Findings from the reports may inform performance monitoring, identify areas for staff coaching or process improvement, and guide continuous improvement efforts across workforce development operations.

CORRECTIVE ACTION

Any errors, omissions, or gaps identified during Launchpad reviews must be corrected immediately by the responsible Business Solutions Representative (BSR) to ensure data accuracy and integrity. If corrections require system-level changes or exceed staff permissions, the BSR must notify a supervisor or the Launchpad administrator in accordance with established protocols. Prompt correction and proper escalation help maintain reliable records, support accurate reporting, and ensure consistent service delivery to employers and job seekers.

CONTINUOUS IMPROVEMENT

To support ongoing data quality, system effectiveness, and compliance, Business Solutions Representatives (BSRs) are encouraged to actively participate in continuous improvement efforts related to Launchpad. BSRs may provide feedback regarding system functionality, data entry processes, or training resources to management at any time. Feedback will be reviewed to identify opportunities for enhancements, clarification, or additional training needs.

As updates or improvements to procedures, system guidance, or training materials are identified, management will communicate changes to staff in a timely manner. Updated resources and instructions will be shared to ensure consistent use of Launchpad, maintain data integrity, and support accurate state reporting requirements.

SECTION III: Standard Operating Procedure (SOP) -Resource Center Job Board Management

PURPOSE

To provide clear procedures for managing job postings on the Resource Center Job Board, ensuring all jobs are accurately recorded, verified, and displayed for job seekers.

SCOPE

This SOP applies to the Resource Center Navigator, BSRs, and relevant staff responsible for entering, verifying, and posting job orders from partner organizations into Launchpad and the physical or virtual job board.

RESPONSIBILITIES

Resource Center Navigator: Main point of contact for receiving job orders from partners and ensuring job postings are verified and displayed.

BSRs: Responsible for entering job orders into Launchpad for partners who do not have access.

Provider Management: Manages workflow, ensures accurate entry of job orders into Launchpad before distribution to AJCC staff, and provides support to the BSR team as needed.

JOB ORDER PROCESSING & POSTING

- **Partners with Launchpad Access:** Enter job orders; Navigator verifies before sharing; missing jobs flagged to management for BSR entry.
- **Partners without Launchpad Access:** Orders routed to program director, who assigns BSR staff to enter them.
- **Verification:** Navigator confirms all job details (position, pay, location, requirements) are accurate.
- **Job Board Posting:** Postings printed from Launchpad and displayed physically or virtually; additional data provided to job seekers as requested.

COMPLIANCE & DATA STANDARDS

- All job postings must comply with Equal Employment Opportunity (EEO) regulations. Postings should avoid any discriminatory language related to race, gender, age, disability, religion, or other protected categories.
- Job orders must include all required fields to ensure completeness and accuracy:
    - Job title
    - Wage or salary range
    - Work location
    - Minimum qualifications or requirements

TIMELINESS

All job orders must be posted in Launchpad within 24 hours of verification. Prompt posting ensures consistency across the system, maintains high service quality, and provides job seekers with timely access to employment opportunities. Adhering to this standard supports accurate reporting, efficient service delivery, and strong employer engagement.

DUPLICATE PREVENTION

Before creating a new job entry, BSRs must check Launchpad to confirm that the job is not already posted. This step helps reduce redundancy, prevents confusion for job seekers, and ensures the integrity and accuracy of data within the system.

JOB BOARD MAINTENANCE

Resource Center staff are responsible for removing expired or filled positions from both physical and virtual job boards. A weekly review of all job postings should be conducted to identify outdated listings and ensure that only current and available opportunities are accessible to job seekers. This practice maintains the accuracy of job information and supports a high-quality service experience.

ACCESSIBILITY

All job board postings must comply with ADA accessibility standards to ensure that job opportunities are accessible to individuals with disabilities. Whenever possible, postings should also include language translation options to support diverse job seekers and promote equitable access to employment opportunities. These measures help ensure that all users can engage fully with available job resources.

PERFORMANCE METRICS

Program leadership will track and monitor key metrics related to job postings, including the total number of postings, the time-to-post for each job order, and job seeker engagement with the postings. These metrics will be used to support accurate reporting, identify trends, and inform continuous program improvement efforts. Regular monitoring ensures that job postings are timely, accessible, and effectively connecting employers with qualified job seekers.

ESCALATION PROTOCOL

If a partner repeatedly fails to enter jobs into Launchpad or submits incomplete information, provider leadership will be notified to address the issue. Appropriate actions may include reminders, additional training, or formal accountability measures to ensure compliance with job entry standards. These steps help maintain accurate records, support timely job postings, and uphold consistent service quality for job seekers and employers.

MENTORING & REPORTING

BSRs and Resource Center Navigators periodically review Launchpad to ensure that all job orders are accurately captured and current. Monthly reports detailing job board activity, job postings, and partner engagement should be generated and reviewed by program leadership. These reviews and reports help maintain accurate records, monitor compliance, and support data-driven decisions for continuous program improvement.

CONTINUOUS IMPROVEMENT

Feedback from BSRs, partners, and job seekers should be collected regularly to identify opportunities for workflow and process improvements. The SOP will be reviewed on a quarterly basis to ensure efficiency, accuracy, and alignment with partner and operational needs. All steps outlined in the SOP are subject to review and updates based on operational requirements, performance metrics, or feedback from partners and staff, supporting continuous improvement and effective program management.

SECTION IV: Standard Operating Procedure (SOP) –OJTs, WEX, and Other Agreements

PURPOSE

To ensure timely development, tracking, and completion of On-the-Job Training (OJT), Work Experience (WEX), and other workforce-related agreements, maintaining accountability and alignment with program requirements.

SCOPE

This SOP applies to all BSRs, management, and staff responsible for developing, monitoring, and implementing OJT, WEX, and similar agreements within the WIOA program.

RESPONSIBILITIES

Business Services Representatives (BSRs) are responsible for developing On-the-Job Training (OJT), Work Experience (WEX), and other agreements in accordance with the established timeline template. They track deadlines for each stage of the agreement process and ensure that all milestones are met. BSRs report progress, as well as any potential delays, during weekly meetings with management and team members to maintain transparency and accountability.

BSR's and Data Entry Staff are responsible for accurately entering all agreement details, including timelines and key milestones, into Launchpad or other relevant tracking systems. They ensure that data is current and easily accessible, supporting both reporting needs and oversight of the agreement process.

Management provides guidance and support to BSRs throughout the agreement development process. They monitor progress, address any delays, and ensure that agreements remain on schedule, offering direction as needed to resolve challenges or obstacles.

COMPLIANCE & DOCUMENTATION

All agreements must comply with WIOA eligibility and documentation standards, including verification of participant eligibility and employer eligibility checks. Signed agreements must be properly stored according to protocol, with both physical copies filed securely and digital copies uploaded to the appropriate system to ensure accessibility, retention, and audit readiness.

DETAILED TIMELINE STAGES

The standard 7–10 business day agreement process is broken down into the following stages to ensure clarity and accountability:

1. **Employer Outreach and Agreement Initiation** – Contact the employer, discuss agreement requirements, and initiate the agreement process.
2. **Drafting and Employer Review** – Prepare the draft agreement and provide it to the employer for review and feedback.
3. **Internal Approval** – Submit the draft agreement for internal review and secure all necessary approvals.
4. **Participant Matching and Enrollment** – Identify and match eligible participants to the agreement and complete enrollment documentation.
5. **Finalization and Start Date Confirmation** – Finalize the agreement, obtain signatures, and confirm the participant start date with all parties.

TRACKING & ACCOUNTABILITY

Agreement progress must be consistently tracked and updated in Launchpad or the designated tracking system. Updates should be performed regularly, with alerts or reminders set to notify responsible staff of approaching deadlines. This ensures all stages of the process are visible, on schedule, and any delays are addressed promptly.

PERFORMANCE METRICS

To evaluate the effectiveness and efficiency of the agreement process, the following performance metrics should be tracked by program management:

- **Average Time to Finalize Agreements** – Measure the time elapsed from agreement initiation to finalization to monitor workflow efficiency.
- **Number of Agreements Completed on Time –** Track how many agreements are finalized within the established timeline to identify potential delays or process bottlenecks.
- **Employer Satisfaction and Community Feedback** – Collect feedback from employers regarding the agreement process to assess satisfaction and identify opportunities for improvement. Feedback from the community is gathered by the WDBVC BSR team during outreach events and is recorded in the Experience Resolution Log to ensure all input is documented and actionable.

WDBVC staff and Program management will review these metrics periodically to support continuous improvement, inform staff training needs, and ensure that agreements are completed accurately, timely, and in compliance with organizational standards.

CORRECTIVE ACTION PLAN FOR MISSED TIMELINES

If established timelines for OJTs, WEX, or other agreements are not met, a structured correction process must be initiated to ensure accountability and prevent future delays. The following steps apply:

1. **Email Notification**
   The responsible staff member must notify local management via email within one business day of identifying a missed or at-risk deadline. The notification must include the reason for the delay, the current status of the agreement, and a proposed revised timeline.
2. **Meeting with Local Management and Written Correction Plan**
   Local management will schedule a meeting with the responsible staff member within three business days to review the issue, identify root causes, and determine corrective actions. A written correction plan will be developed and documented, outlining corrective steps, responsible parties, revised deadlines, and measures to prevent recurrence.
3. **Corporate Leadership Review and Escalation**
   Ongoing or unresolved issues will be escalated to **corporate leadership** for further review. Corporate leadership may require additional corrective actions, process changes, or other interventions as deemed necessary.

All corrective actions, communications, and escalation steps must be documented and maintained for compliance, monitoring, and continuous improvement purposes.

INTEGRATION WITH OTHER SOPS

This SOP is designed to align with and support related Standard Operating Procedures to ensure consistency, accuracy, and compliance across all workforce system activities. Staff must reference and adhere to applicable SOPs when performing tasks associated with agreement development, tracking, documentation, and issue resolution.

Related SOPs include, but are not limited to:

- **Data Entry SOP** – for requirements related to timely, accurate entry of agreement details and updates into Launchpad or other designated systems.
- **Employer Resolution SOP** – for procedures related to documenting, escalating, and resolving employer concerns or feedback.
- **Experience Resolution Log SOP** – for recording and tracking community and employer feedback gathered during outreach events.

MONITORING PROGRESS

Ongoing monitoring is required to ensure OJTs, WEX, and other agreements are developed and implemented in a timely and compliant manner.

Meetings
Program staff will hold internal weekly meetings to review the status of all active OJTs, WEX, and other agreements. During these meetings, staff will identify any delays, barriers, or obstacles impacting progress and assign corrective actions as needed to keep agreements on schedule.

Progress Tracking
Staff will use the approved timeline template and designated tracking tools, including CalJOBS Launchpad, to document the completion of each stage of the agreement process. Timelines must be updated regularly to accurately reflect the current status of each agreement and support effective oversight, reporting, and accountability.

This monitoring process ensures transparency, early identification of issues, and timely resolution to support successful agreement execution.

CONTINUOUS IMPROVEMENT

To support efficiency, compliance, and quality service delivery, the timeline process for OJTs, WEX, and other agreements will be evaluated on a quarterly basis or as needed. WDBVC program management will assess the effectiveness of timelines, tracking tools, and procedures to determine whether established processes are meeting operational and performance expectations.

Updates to the timeline template, deadlines, and related procedures will be made as needed based on lessons learned, performance data, and feedback received from staff, employers, and partners. Any approved changes will be communicated to relevant staff and implemented to promote continuous improvement, consistency, and responsiveness to workforce and employer needs.

This process ensures that agreement development and monitoring practices remain effective, adaptable, and aligned with organizational goals.

SECTION V: Standard Operating Procedure (SOP) – Event Participation and Accountability

PURPOSE

To provide clear guidance for BSR participation in cohosted events and job fairs, ensuring effective coordination, accurate documentation, and accountability for all activities.

SCOPE

This SOP applies to all BSRs, and staff involved in planning, attending, or supporting events, including job fairs, employer focus groups, and other workforce-related community activities.

RESPONSIBILITIES

BSRs- Staff are expected to participate in assigned events and fulfill their designated roles. During these events, they must document all employer interactions and related activities in Launchpad to ensure accurate tracking of engagement and services. Following the event, staff should provide feedback on the event's effectiveness, including observations and suggestions for improvement, to support ongoing enhancements in event planning and execution.
Management- Management is responsible for overseeing event planning and ensuring that team assignments are clearly defined and executed. They review feedback from events, assess outcomes, and coordinate improvements to enhance future event effectiveness, team performance, and overall employer and participant engagement.
Resource Center Navigator-Resource Center Navigators are responsible for supporting events by conducting outreach within the Resource Center. They assist in engaging job seekers and providing information about event opportunities, helping to ensure successful participation and effective communication between employers, staff, and participants.

COMPLIANCE & DOCUMENTATION

All workforce, employer, and community events must adhere to established compliance and documentation requirements. Staff participating in events are responsible for ensuring that sign-in sheets, employer participation records, and registration data are accurately collected for each event. Registration and attendance may be captured using Google Sheets and/or an approved event management platform within Launchpad, as applicable. All registration and sign-in sheets must include the required elements outlined in Steven's Amendment to ensure compliance with program regulations. All records must be stored securely in accordance with organizational record-retention protocols.

Documentation containing participant or employer information must be handled in compliance with applicable data privacy and confidentiality standards. Personal or sensitive information must be protected from unauthorized access and shared only with authorized staff for approved business purposes.

Program management will periodically review event documentation to ensure compliance with documentation, regulatory requirements, data security, and privacy standards. Proper collection and secure storage of event records support accurate reporting, accountability, and audit readiness.

CHECKLIST REVIEW & COMPLIANCE

Staff shall review and utilize the **Event Partnership and Planning Guide (Appendix I)** for all job fairs to ensure that all required planning, coordination, and operational tasks are completed. The checklist shall serve as the primary planning and execution tool for job fair activities.

Event Preparation Timeline

The Event Partnership and Planning Guide shall include a defined timeline outlining key preparation milestones. At a minimum, timelines should address employer recruitment and confirmation (e.g., securing employer participation no later than two weeks prior to the event), job seeker outreach to enrolled participants, and broader community outreach efforts.

Communication and Outreach Plan

The planning guide shall incorporate a communication plan detailing notification procedures for partners, employers, and job seekers. This plan shall identify communication methods, responsible staff, and timelines to ensure timely and consistent outreach.

Logistics, Accessibility, and Materials

The Event Partnership and Planning Guide shall include, at a minimum, tasks related to securing venues, coordinating materials and supplies, Wi-Fi and technology setup, accessibility accommodations, marketing and promotional materials, and day-of-event preparations such as signage placement and registration table setup.

Appendix Integration

The Event Partnership and Planning Guide shall be embedded as Appendix I to this SOP to ensure accessibility, consistency, and standardization across all job fair events.

POST-EVENT FOLLOW-UP

Effective post-event follow-up is essential to maintain relationships with employers, partners, and participants, as well as to ensure accurate record-keeping. Staff are responsible for completing all post-event activities promptly and in accordance with organizational standards.

- **Employer Interaction Documentation:**
  All employer interactions, feedback, and relevant event notes must be entered into Launchpad or the designated tracking system within 48 hours of the event. This ensures timely data capture, supports reporting requirements, and enables ongoing engagement tracking.
- **Thank-You Communications:**
  Staff must send thank-you emails to all participating employers and partners as part of post-event follow-up. Communications should acknowledge their participation, provide any requested resources or next steps, and maintain a professional and appreciative tone to foster continued engagement.

Adherence to these post-event follow-up procedures ensures accountability, strengthens employer and partner relationships, and supports accurate documentation for program monitoring and continuous improvement.

PERFORMANCE METRICS

To evaluate the effectiveness of events and outreach activities, program management will track key performance metrics on an ongoing basis. Metrics include:

1. **Number of Employers Registered vs. Attended** – Track the ratio of employers who registered for the event compared to those who actually attended. This metric helps assess outreach effectiveness and employer engagement strategies.
2. **Job Seeker Attendance** – Record the number of job seekers who participate in each event to evaluate participant engagement and event reach.
3. **Employer Satisfaction Scores** – Collect feedback from employers regarding their event experience, including satisfaction with event organization, participant quality, and overall engagement. Feedback may be captured through surveys or other formal evaluation tools and recorded in Launchpad or the Experience Resolution Log.

program management will review these metrics regularly to identify trends, measure success, inform improvements to event planning, and support continuous improvement initiatives.

ESCALATION PROTOCOL

To ensure accountability and maintain compliance, an escalation protocol is in place for situations where assigned roles are not fulfilled or required documentation is incomplete.

- **Identification of Issues:**
  Staff are responsible for identifying and reporting any instances where tasks are not completed, assigned roles are not fulfilled, or documentation (e.g., sign-in sheets, employer interactions, agreement records) is missing or incomplete.
- **Immediate Notification:**
  The issue must be reported to local management as soon as it is identified. The notification should include the nature of the issue, impacted tasks or agreements, and any relevant supporting documentation.
- **Corrective Action and Follow-Up:**
  Local management will assess the issue and assign appropriate corrective actions to the responsible staff member. This may include completion of missing documentation, retraining, or reassignment of tasks.
- **Escalation to Corporate Leadership:**
  If the issue remains unresolved or is part of a recurring pattern, it will be escalated to corporate leadership for further review. Leadership may require additional interventions, process changes, or other corrective measures to prevent recurrence and ensure compliance.

This protocol ensures timely resolution, accountability, and documentation of all issues, supporting organizational efficiency and adherence to program standards.

COHOSTED EVENTS

Event Planning & Scheduling

A coordinated calendar of cohosted events shall be developed and maintained in collaboration with the WDBVC and relevant community partners. The calendar will document event dates, locations, partner organizations, and objectives to support effective planning and coordination.

Roles and Responsibilities

For each cohosted event, staff roles and responsibilities shall be assigned in accordance with the roles outlined in the Event Partnership and Planning Guide (Appendix I). These roles may include, but are not limited to, registration coordination, employer liaison, presentation facilitation, logistical support, and post-event follow-up. Assignments shall be based on staff availability and functional expertise to ensure consistent and effective implementation.

Communication and Accountability

Assigned roles, responsibilities, and performance expectations, as defined in the Job Fair Checklist (Appendix I), shall be communicated to all participating staff prior to the event. Staff are accountable for completing their assigned tasks and coordinating with partners as required. Any changes to assignments must be communicated promptly to ensure operational continuity and accountability.

FEEDBACK

A feedback process shall be implemented for all events, including job fairs, to evaluate staff participation and overall event effectiveness. Post-event feedback shall occur through a scheduled debrief meeting whenever feasible or, at a minimum, through documented email feedback. Input shall be collected from Business Services Representatives (BSRs), employers, partners, and event participants. Evaluation metrics may include employer engagement, attendance, service delivery effectiveness, and completion of follow-up actions.

CONTINUOUS IMPROVEMENT

Feedback shall be reviewed on a regular basis to identify trends, strengths, and opportunities for process improvement. Findings shall be used to inform planning, enhance coordination, and improve outcomes for future events.

SECTION VI: Standard Operating Procedure (SOP) – Experience Resolution Log Procedures

PURPOSE

To ensure employer inquiries, issues, or feedback are addressed promptly, tracked systematically, and resolved in a timely manner to maintain strong employer relationships and program accountability.

SCOPE

This SOP applies to all Program Managers, provider management BSR and relevant staff responsible for responding to and tracking employer-related issues, questions, or feedback within the WIOA program.

RESPONSIBILITIES

WDBVC Staff-Collect and submit issues noted during events activities.

WDBVC Program Manager

- Take action or escalate as appropriate.
- Record details in the Experience Resolution Log.
- Follow up with the employer to confirm resolution.
- Monitor the Experience Resolution Log for timeliness, accuracy, and trends.
- Provide guidance or support when escalation is required.

INDENTIFY & DOCUMENT ISSUE

All concerns, complaints, feedback, or service-related issues provided to any WDBVC staff member by job seekers, partners, schools, employers, or internal teams shall be documented in the Experience Resolution Log. Staff shall gather all relevant details from the reporting party and any internal teams involved to ensure accurate, complete, and consistent documentation. Details to collect include:

- Employer name and contact information
- Date reported
- Description of the issue
- Actions taken to address the issue
- Resolution date
- Responsible WDBVC Program Manager
- Responsible Provider Manager

ASSESSMENT OF ISSUE TYPE AND URGENCY

Upon intake, each issue shall be reviewed to determine its nature, scope, and level of urgency. This assessment shall inform prioritization, assignment, and the appropriate response to support timely and effective resolution.

The Program Manager shall assign the issue to the responsible partner management via email.

TIMELINES

Timely resolution of issues is critical to maintaining service quality and employer satisfaction. All issues documented in the Experience Resolution Log shall be addressed according to established timelines. Upon intake, the responsible staff member or Program Manager shall determine an expected resolution timeframe based on the urgency and complexity of the issue. High-priority or urgent issues shall be addressed immediately or within **24–48 hours**, while standard issues should be resolved within **5–7 business days**, unless otherwise specified. Staff shall monitor progress and provide regular updates to supervisors and partner management as appropriate. All resolution dates and follow-up actions must be recorded in the log to ensure accountability and support performance tracking.

CRITERIA FOR ESCALATION

An issue shall be escalated when one or more of the following conditions apply:

- The issue cannot be resolved at the program management level within established timeframes.

- The issue involves repeated or systemic concerns.
- The issue has the potential to impact service quality, program compliance, safety, or stakeholder trust.
- The issue involves multiple partners, employers, or external entities.

Escalation Levels

Level 1: Program Manager review and intervention, with communication to partner management.

Level 2: Executive leadership or designated authority involvement for high-impact or unresolved and continuing issues.

COMMUNICATION DURING ESCALATION

All actions and updates shall be documented in the Experience Resolution Log. Relevant stakeholders, including partner management, shall be informed of escalation status, next steps, and expected timelines, as appropriate.

RESOLUTION & CLOSURE

Once resolved, the outcome and any corrective actions shall be documented in the Experience Resolution Log. Issues shall be formally closed only after confirmation that appropriate resolution has occurred.

FOLLOW-UP WITH EMPLOYER

After an issue has been addressed, WDBVC staff shall follow up with the employer to confirm that the resolution was effective and that their concerns have been fully addressed. Follow-up may include a phone call, email, or survey, depending on the nature of the issue. Documentation of the follow-up, including any additional feedback received, shall be recorded in the Experience Resolution Log. This step ensures accountability, strengthens employer relationships, and provides insights for improving services and preventing similar issues in the future.

PERFORMANCE METRICS

Performance metrics are tracked to monitor trends, identify recurring issues, and improve service quality for job seekers, employers, partners, and internal teams. All issues documented in the Experience Resolution Log shall be analyzed to capture key metrics, including recurring issues by employer and recurring issues by category, such as registration, accessibility, communication, or technical support. These metrics shall be reviewed regularly by the Program Manager or designated staff to identify patterns, highlight high-frequency concerns, and provide recommendations for corrective actions. Findings shall be shared with leadership, staff, and, when appropriate, partner management to support continuous improvement. The collected data shall inform staff training, process improvements in event planning and employer engagement, and strategic planning to prevent recurring issues, ensuring more efficient and effective service delivery.

EMPLOYER SATISFACTION

Employer satisfaction is a key measure of service quality and effectiveness. After an issue has been resolved, WDBVC staff shall actively collect feedback from the employer to assess their satisfaction with the resolution process and the overall service provided. This feedback shall be documented in the Experience Resolution Log and reviewed by the Program Manager or designated staff to identify areas for improvement. Regular analysis of employer feedback helps inform process enhancements, strengthens partner relationships, and ensures that services are responsive, efficient, and aligned with employer needs.

MONITORING

WDBVC Program Managers and Provider Management shall review the Experience Resolution Log on an ongoing basis to ensure effective oversight and continuous improvement. Monitoring activities include verifying the timely resolution of issues, confirming the accuracy and completeness of all log entries, and identifying trends or recurring issues that may indicate systemic challenges. Insights gained through regular monitoring shall be used to implement process improvements, enhance service quality, and prevent future issues.

COMPLIANCE & DOCUMENTATION

All information recorded in the Experience Resolution Log must be treated as confidential and handled in accordance with WDBVC data security policies. Access to the log shall be restricted to authorized staff only, and it must be stored in a secure, centralized location to prevent unauthorized use or disclosure. Staff are responsible for safeguarding employer and internal information, ensuring that all entries are accurate, complete, and protected, while maintaining compliance with privacy standards and organizational protocols.

CONTINUOUS IMPROVEMENT

Insights gained from the Experience Resolution Log shall be used to identify opportunities for process enhancements, targeted staff training, and system or workflow updates. To maintain effectiveness and alignment with organizational goals, the SOP and log procedures shall be reviewed on a quarterly basis, with updates made as needed to address emerging trends, recurring issues, or changes in operational requirements. This ongoing review process ensures that resolution practices remain efficient, consistent, and responsive to the needs of employers, job seekers, and partner organizations.

Appendix I: Event Partnership and Planning Guide

Event Name:		
Leading Partner:		
Event Date:		
Location:		
Event Time:		
Points of contact:		
Key Metrics Goals:		
Employers:		**Post-Event Results**
Attendees:		**Employers Attended:**
Partner Commitments		**Job Seeker Attendees:**
1 Month – 1.5 Months Before Event	Completed	
Room identified and reserved	☐	
Flyer finalized	☐	
Priority Access- Veterans and enrolled candidates can come 30 minutes before (identified by stickers)	☐	
Shared Google Doc or Microsoft Excel created to track employer outreach and avoid duplication	☐	
Employer Recruitment	☐	
Employer recruitment expectations established with partners	☐	
New employer participation targeted	☐	
Identify employers unable to attend but willing to submit job orders	☐	
Lunch	☐	