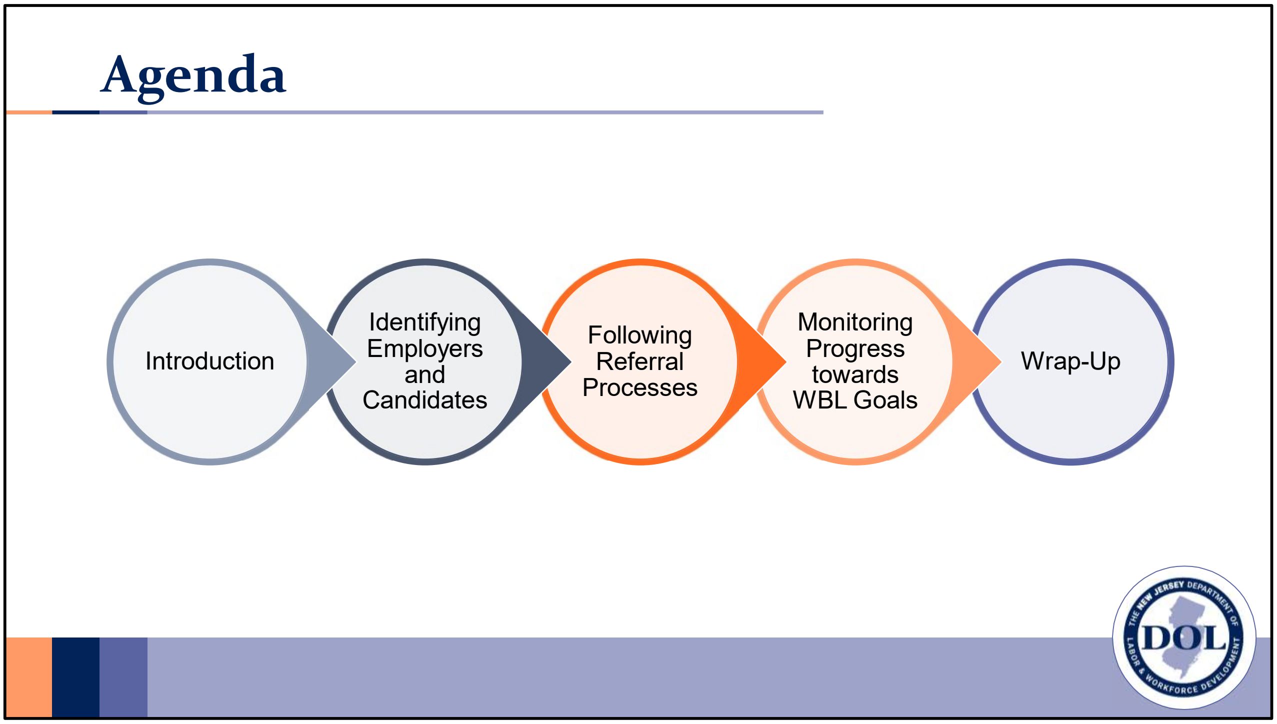
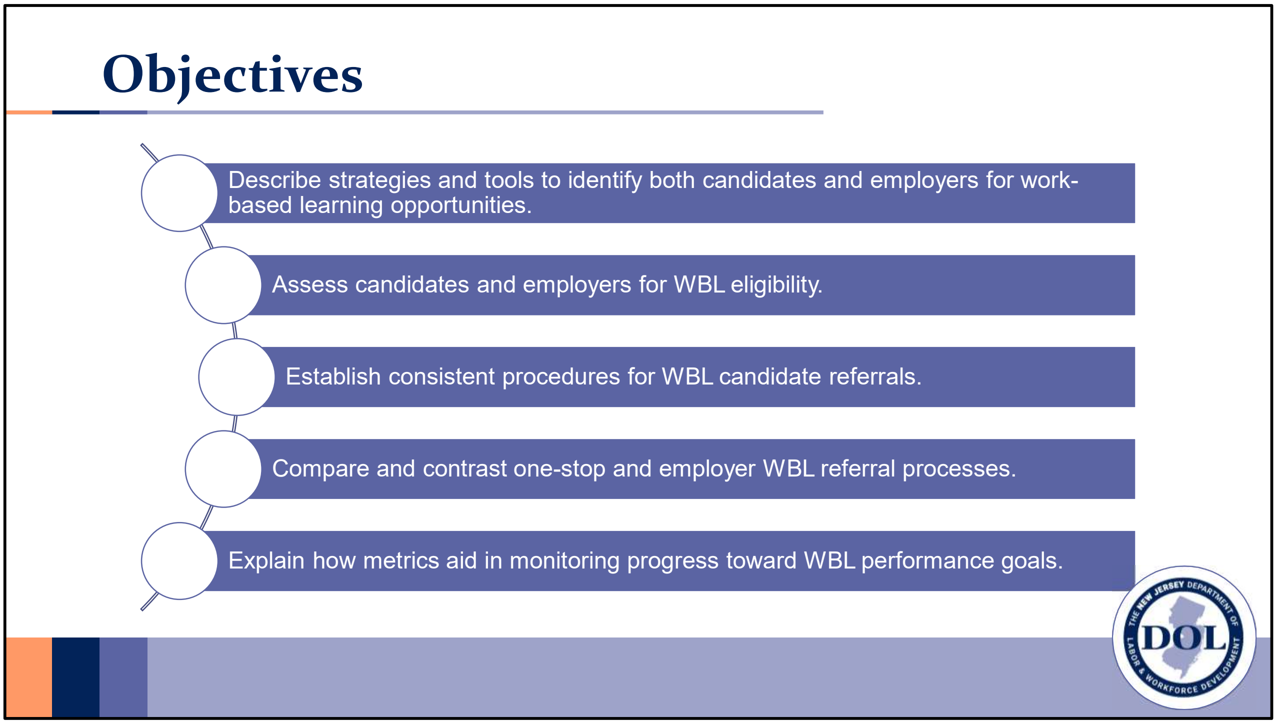
Work-Based Learning 102

Candidate and Employer Processes

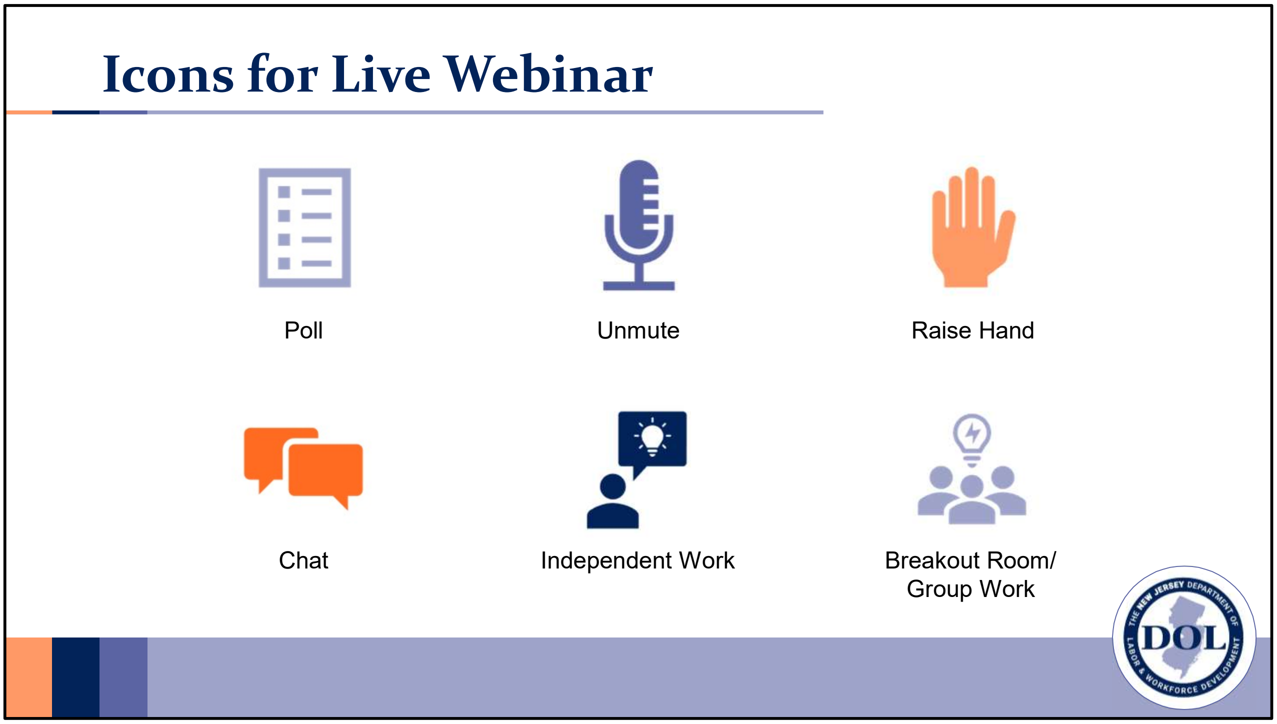
- Welcome to the training “Work-Based Learning 102: Candidate and Employer Processes!” This is the second training on our series and this builds on the information covered in the first training, where we introduced work-based learning and briefly reviewed four types: On-the-Job Training; Incumbent Worker Training; Transitional Job (also called Work Experience); and Pre-Apprenticeships and Apprenticeships.



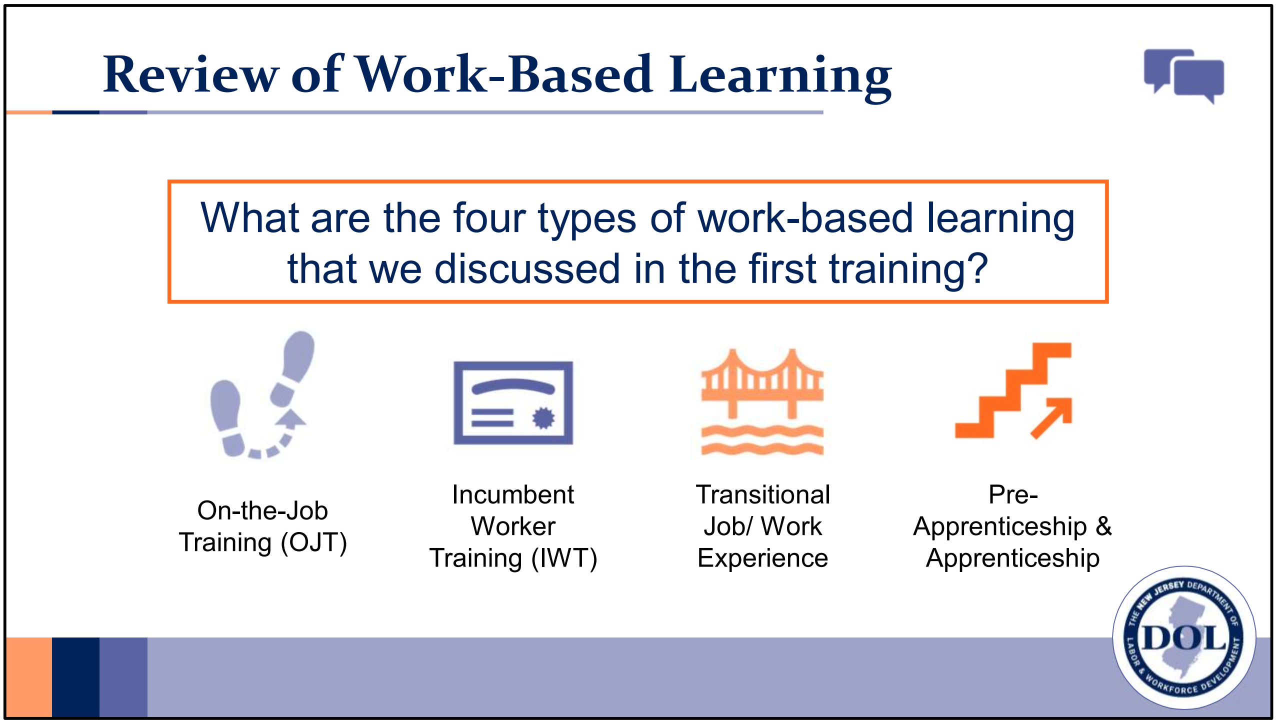
- Our agenda for today is:
    - An introduction section, where we are now, to share the agenda, objectives, and webinar tools
    - Identifying Employers and Candidates
    - Following Referral Processes
    - Monitoring Progress towards WBL Goals and
    - A wrap-up section!



- Let’s look at our objectives for this module. Objectives are what you should be able to do by the end of this module.
    - Describe strategies and tools to identify both candidates and employers for work-based learning opportunities.
    - Assess candidates and employers for WBL eligibility.
    - Establish consistent procedures for WBL candidate referrals.
    - Compare and contrast reverse referral and traditional WBL referral processes.
    - Explain how metrics aid in monitoring progress toward WBL performance goals.



- Each symbol on this slide represents a type of workshop activity delivered via webinar. Review each symbol and its meaning.
  - Poll: Participants will take a poll, on screen, and we will be able to look at and discuss results.
  - Unmute: In response to a prompt, participants are invited to unmute themselves (or be unmuted) in order to share.
  - Raise Hand: Participants can virtually signal a hand raise or agreement when the facilitator asks for a show of hands.
  - Chat: Participants respond to a question in the chat feature where everyone can see.
  - Independent Work: Participants complete something individually and independently during the webinar.
  - Breakout Room: In groups, participants go to virtual breakout rooms where they work on or discuss something.



- Four main types of WBL that we discussed in the first module are:

1. On-the-Job Training (OJT)
    - An OJT is a contract between an employer, employee, and workforce development office to provide reimbursement for wages paid to a hired candidate, who requires training.
2. Incumbent Worker Training (IWT)
    - An IWT is when the workforce development entity works with an employer to upskill an employee by paying a training provider directly to train or certify the employee.
3. Transitional Job/ Work Experience
    - A Transitional Job (or Work Experience) is when an employer provides temporary employment for candidates who have very limited work experience (for example, youth) or other barriers, who could benefit from work experience to build their resumes.
4. Pre-Apprenticeship & Apprenticeship
    - A pre-apprenticeship is a short-term training program offering industry credentials that prepares people to enter and succeed in at least one registered apprenticeship.
    - A registered apprenticeship is an approved training program which involves both classroom and on-the-job training according to federal guidelines.

- Now that we've briefly reviewed the four types of WBL, let's jump into our first main topic for today!

Identifying Employers and Candidates

Strategies and Tools

- In this section, we will begin the discussion of strategies and tools for making work-based learning a success for all parties. We will review how to effectively identify employers and candidates for WBL opportunities, and how to assess both parties for eligibility.

- It's important to note that all strategies and tools exist within certain parameters. These parameters guide the selection and usage of our strategies and tools. Key parameters include:
  - Parameters of the occupation and employer. For example, is there a requirement as to the size of the employer, or the type of occupation? Many WBL trainings, such as OJTs and apprenticeships, are exclusively for technical or hard skills; an employer seeking reimbursement for soft skills training is not the right fit. There are also wage requirements, which can vary by type of WBL and county.
  - Parameters of the county/state/federal guidelines. Certain monies are distributed from federal to state to local level, and come with contingencies and stipulations for usage.
  - Parameters of the qualifying candidate. Who is this for? An employee who already works for the company but needs advanced training (in the case of an IWT), or any candidate at all, or a dislocated worker only, etc?
  - Parameters of the type of WBL. For example, registered apprenticeships need to involve a specified number of hours of classroom training as well as on-the-job training. However, on-the-job training is entirely hands on.

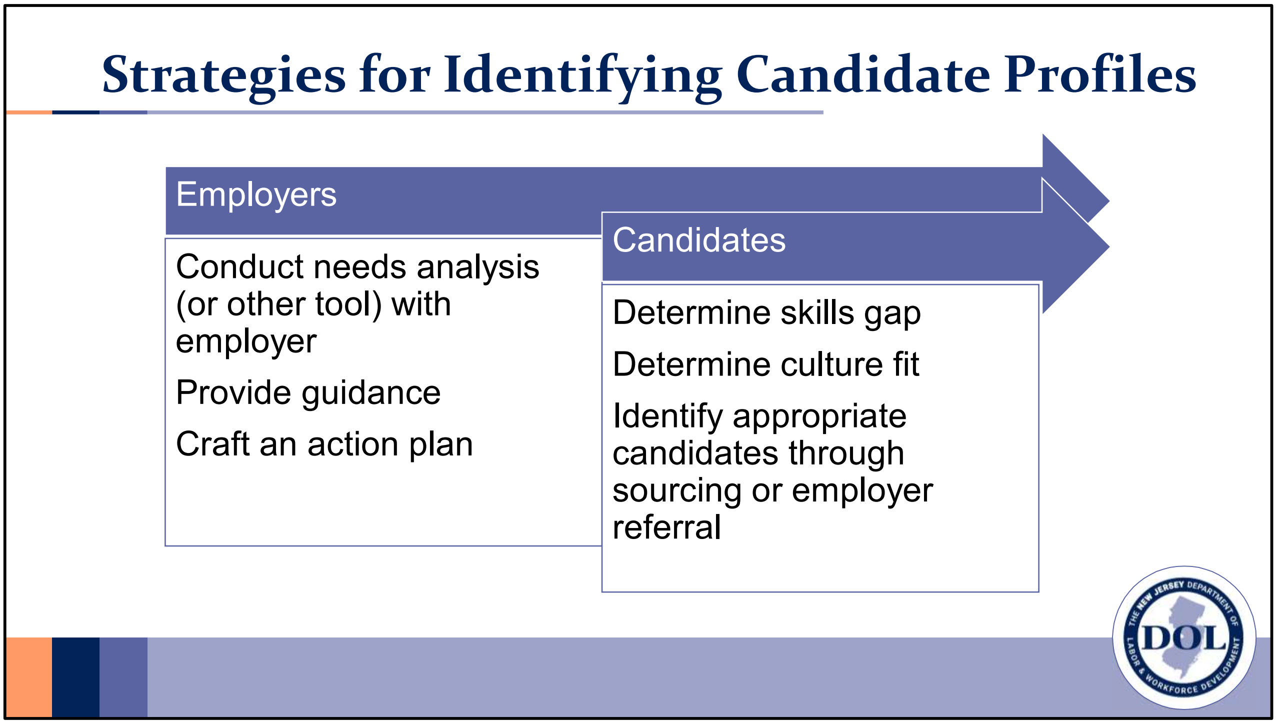
Strategies for Identifying Employers

- ✓ Determine high priority occupations (HPOs)
- ✓ Consider your target candidates
- ✓ Consider the size of company
- ✓ Use methods such as: Mailing, cold calling or emailing; speaking at Chamber or industry-specific events; and using social media
- ✓ Know which WBL to recommend, current guidelines, and how to explain without overwhelming the employer
- ✓ Emphasize relationship building and build trust over time

- Determine high priority occupations (HPOs).
  - Does your state and workforce development board (WDB) have high priority occupations (HPOs) where should staff be focusing their attention? Focusing on HPOs helps to align workforce training and education with occupations that employers value and will pay family-sustaining wages. Having staff start with specific industries and occupations may also help them direct their pitch to the employers and jobs that truly qualify for a WBL, without getting hung up trying to sell it to every employer for every job.
- Consider your target candidates.
  - Consider who your target population is that you will be drawing candidates from. Who are the people who walk into your One-Stop Center? What are their demographics, their needs, and their aspirations? Knowing the candidate pools that you have to draw from can help inform the types of employers and occupations that will lead to the most matches.
  - Tip: In your one-stop, have “pools” or groups of candidates sorted according to basic skill inclinations or job experiences/interests.
- Consider the size of company.
  - The sweet spot for WBLs tends to be small or medium-sized locally owned companies with entry level positions that require significant training, where it's hard to find already qualified candidates. IWT's are a good fit for the same, but to provide further education for more senior level incumbent

workers. Small and medium size companies are interested in the funding as it helps them grow, and they have local final decision markers invested in the company's success who are accessible to local workforce staff for meetings.

- Use methods such as: Mailing, cold calling or emailing; speaking at Chamber or industry-specific events; and using social media.
    - These efforts help get the word out and garner interest specifically for WBL.
- Know which WBL to recommend, current guidelines, and how to explain without overwhelming the employer.
    - Much of the WBL sale to employers comes from knowing what to offer employers we are approaching or being approached by for other reasons, mainly for job postings/sourcing. Knowing which WBL to offer/recommend over another is very important here, as well as being versed enough to know current guidelines for each and be able to explain the process and the WBL without overwhelming or confusing the employer. Having a flow chart of what to offer when can help. Also, it's a good idea to have marketing materials!
- Emphasize relationship building and build trust over time.
    - Since relationships are so important, when possible, use personal introductions through your existing employer network and chamber contacts. Then be sure to meet face-to-face (or through video meetings) to build rapport and trust. "Selling" a government funding opportunity or program takes a lot of work, touch points and information to build trust. Even if there is an existing relationship with an employer, it can still take time to explain WBL to an employer to point where they feel comfortable using it.
    - See things from the employer's perspective: All WBLs require an investment of time, resources and manpower, and especially the sharing of proprietary and sensitive information. All of these investments require building trust.

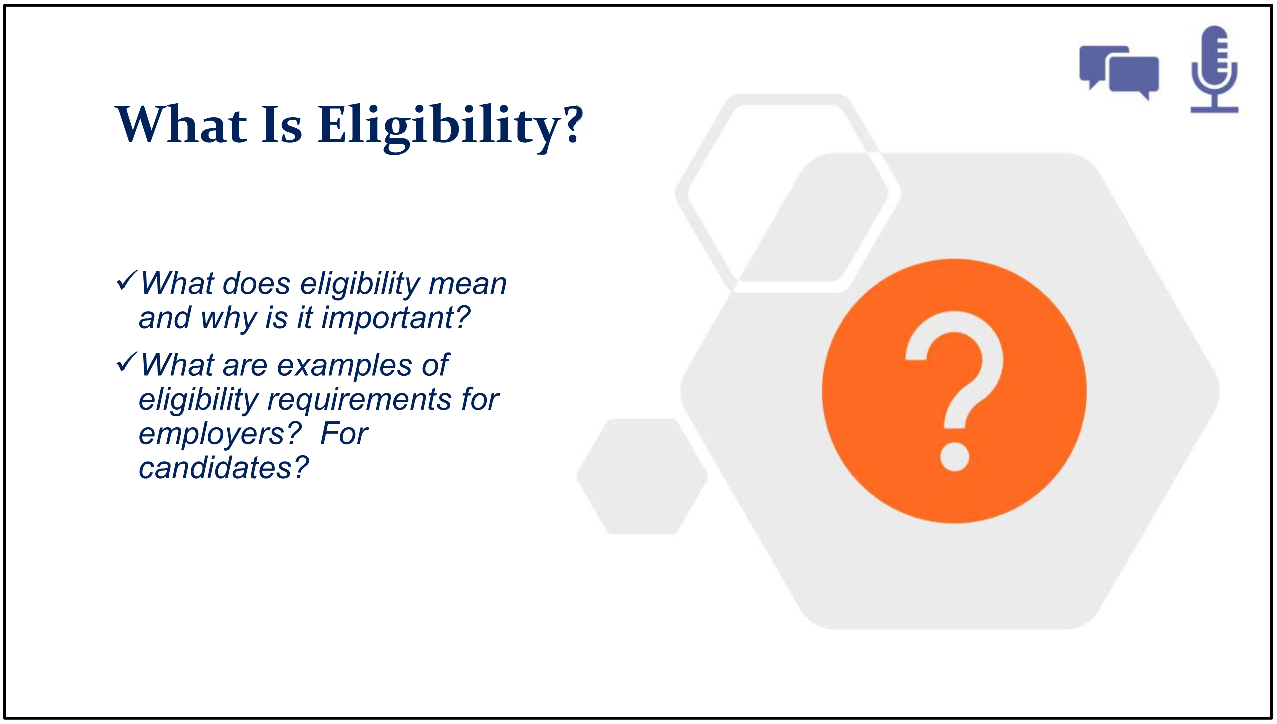


- After workforce staff have considered the parameters, and identified employers who would benefit from WBL solutions, they will employ certain strategies to identify candidate profiles. These strategies begin with the employer, as depicted by the slide.
  - *It's important to remind employers that they're in the driver's seat. WBL or not, they get to decide who to hire, who to retain, who to promote, etc. according to their typical human resources processes. WBL does not take autonomy out of the employer's hands. An employee hired via WBL is not treated differently than an employee hired outside of that.*
- When you work with the employer to create a WBL solution, you will conduct a needs analysis (or other tool) to better understand their needs in hiring or training. You will also provide guidance, since there are different types of WBL, and since the process can be confusing or overwhelming for employers. It will be your responsibility to create an action plan to guide the employer through the WBL process, manage expectations, and communicate clearly and concisely. For example, many WBL programs have mandatory minimum wages, which vary by county and/or type of WBL, and the employer needs to be on board for that.
- From there, in order to identify appropriate candidate profiles, you will determine the skills gap. What are the baseline or non-negotiable skills of the position, and which can be remedied by a training program? An appropriate candidate profile may have 60% or 75% of the skills needed – but there is a skills gap. This skills gap is what WBL funds are covering!
  - *Note that it is not only crucial to manage the employer's expectations, but also the candidate's. Don't pitch WBL to candidates as a total career change/start from*

scratch situation, or they may become disillusioned or disappointed when faced by employer's reality and needs.

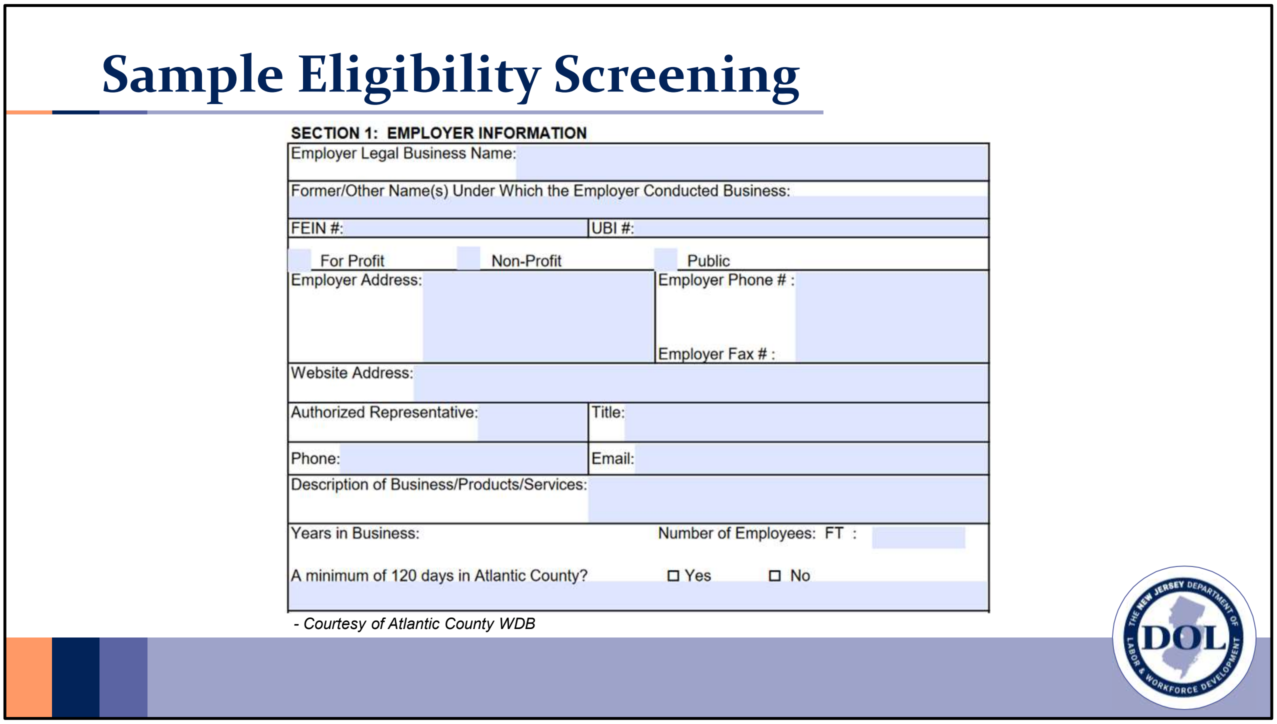
- When identifying the candidate profiles, it is also important to determine the culture fit. For example, if it is a very team-oriented, small-business, everyone wears many hats kind of culture, that is relevant information for all parties! Finally, you would identify appropriate candidates through sourcing or employer referral.

- Of course, it’s important to note that not all WBL programs even involving sourcing. For example, in an IWT, the candidate is internal and an employee already!

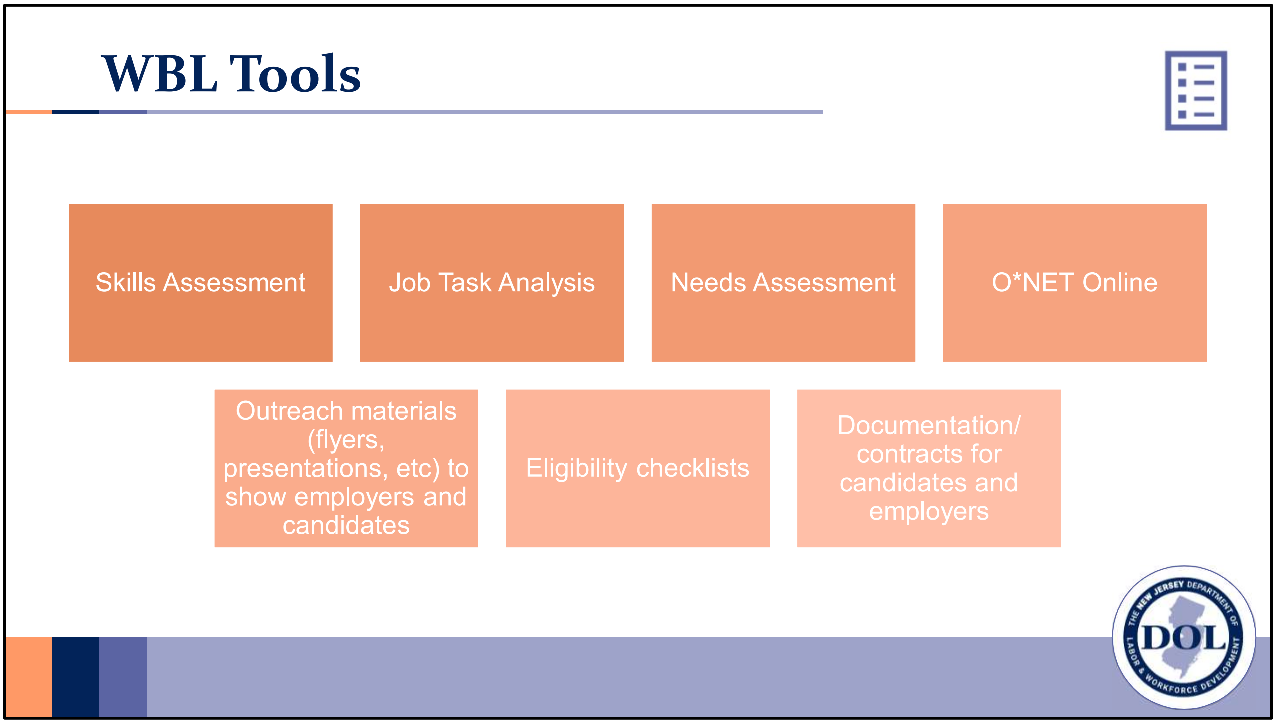


- One important concept related to identifying both employers and candidates is eligibility.
- Key Points:
  - Eligibility refers to whether something or someone meets the qualifications to be chosen, selected or allowed to do something.
  - Eligibility is not the same thing as suitability. Just because you can, doesn't mean you should! Someone might be eligible for a program but not be a good fit that program!
  - In WBL, eligibility applies to *both* employers (themselves and their occupations) and candidates. It's important for workforce staff to be familiar with eligibility requirements when they are identifying employers and candidates.
  - Eligibility is important because funds do come with requirements; funding streams determine eligibility. You may be audited to ensure you are following these eligibility guidelines. Also, if employers and candidates are not eligible, or cannot reasonably become eligible, it's a waste of time and resources to pursue them.
  - Note: Eligibility varies according to type of WBL, and whether a program is state or local level.
    - However, examples of eligibility requirements for candidates include: A WIOA eligible Adult, Dislocated Worker or Youth; an incumbent employee (in the case of an IWT); ability/willingness to be trained; ability/willingness to work specified hours/week; baseline credentials or skills; and so on.
    - Examples of eligibility requirements for employers include: Proper insurance, a FEIN number, up-to-date on taxes, no recent layoffs for the position of

interest, compliance with state and federal affirmative action/ADA/EEO laws, not 1099; and eligibility for WBL jobs may involve wage minimums; length of training; hours per week of work; retention of successful trainees; treatment of WBL employee the same as any other employee in all areas including benefits, wages, etc.; size of employer; and so on.



- To determine eligibility requirements, you need to understand your parameters – occupation and employer; county/state/federal guidelines; qualifying candidate; and type of WBL.
- Candidates can be screened for eligibility by a career coach or case manager, perhaps using a checklist. Employers should be screened for eligibility by business service representatives or job developers. Be up front with employers about non-negotiables, such as “Are you willing to train people for this occupation?” and “Can you do the wage minimum?”
- The example on the slide is a section from a multi-page document that screens for eligibility of employers interested in OJTs. This document is courtesy of Atlantic County WDB.
- Note that it’s an editable PDF where employers can just type in their answers – whatever makes the information and process easier for employer to understand and do, is a good idea!



- Let's look at specific tools that help us determine eligibility! These tools include:
  - Skills Assessment
    - These assessments measure the skills, knowledge and abilities that candidates currently possess. They are designed to provide a snapshot of where candidates' skills are to identify skill gaps. Some skills assessments require the demonstration of proficiency, while others are self-reported. EDSI often uses Skilldex, a proprietary, customizable self-reported skills assessment.
  - Job Task Analyses
    - A JTA is a systematic process to identify the tasks and responsibilities related to a specific job. A JTA also lists necessary knowledge and skills, relationships, and tools and equipment. A JTA can be done by interviewing subject matter experts, reviewing documents, and conducting surveys to identify skill gaps.
  - Needs Assessment
    - An employer's needs assessment would provide data from that employer concerning hiring trends, retention, and skill gaps, for example, that would provide insight into the challenges for the employer. This information is critical for defining areas of focus for developing training and apprenticeship programs.
  - O*Net Online
    - Sponsored by the US Department of Labor, O*NET Online is a valuable resource on occupational information in the US. It describes and categorizes almost

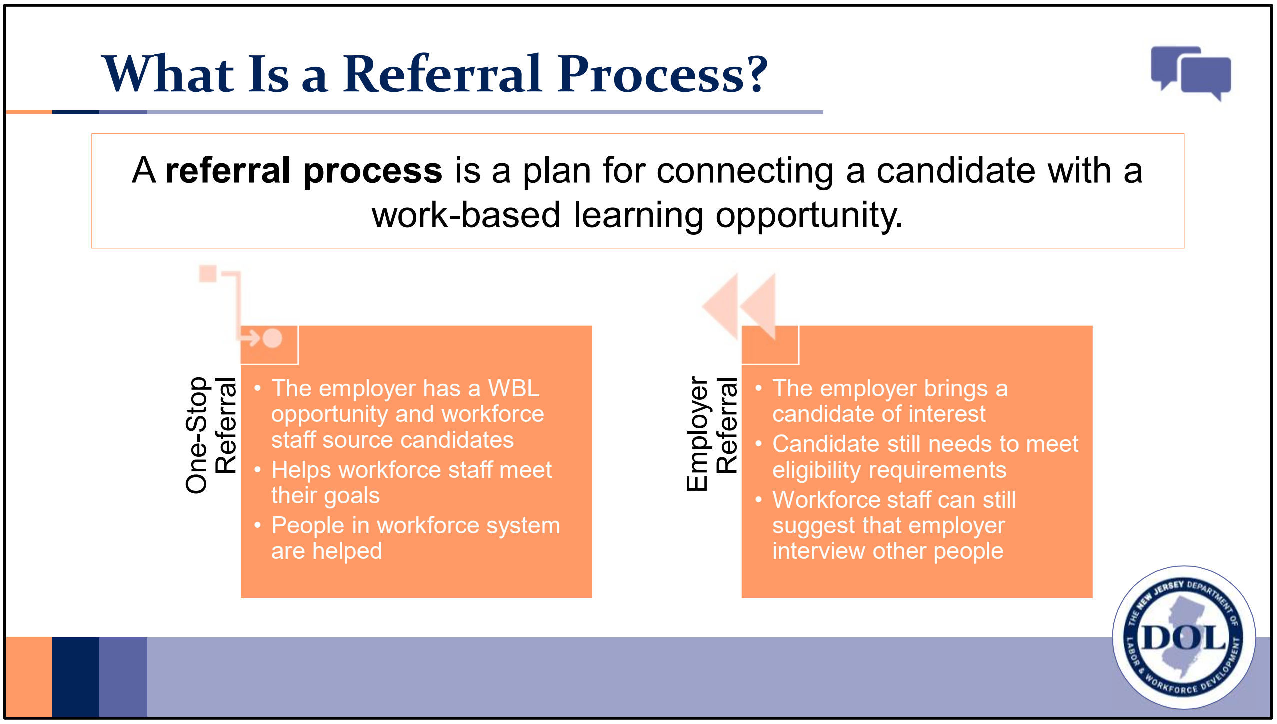
1,000 occupations. It is used by both candidates and workforce staff to conduct research and organize efforts. For example, in NJ, the complexity – the O*NET zone – determines the wage and timeframe of an OJT training.

- Outreach materials (such as flyers, presentations, etc.) to show employers and candidates
    - Employers can get overwhelmed because there are so many rules and regulations for WBLs. Therefore, it's very helpful to have marketing materials that are easy to understand and have key information.
    - For example, a handout that staff could read from and send to employers explaining all the details and having a standardized process in place for onboarding and processing WBL, that all staff can speak to in some capacity, would go a long way for any professional tasked with "selling" WBL to employers.
- Eligibility checklists
    - This tool would vary based on the type of WBL, and of course whether you were determining the eligibility of candidates or employers. This is a tool you would keep handy to screen for eligibility as well as begin collecting the information that you will need later!
- Documentation/contracts for candidates and employers
    - This documentation will look different based on type of WBL and county vs. state, but everything needs to be properly recorded. Contracts may be signed between the candidate, workforce entity, and employer; or perhaps between just the employer and workforce entity. There may be a training plan for the candidate. Other possible stakeholders include a training provider and a union representative.

Following Referral Processes

- Work-based learning programs should have clear and consistent processes set up for candidate referrals

- We have dual customers – both employer *and* candidate!
- Please remember the importance of keeping both customers in mind for this section on referral processes, *no matter what your role is.* Even if you always work with employers, the candidates are still your customers. Or, even if you always work with candidates, the employers are still your customers. Perhaps you are on the fiscal or data team, and your position happens to not work directly with either – but they are both still your customers!
- Having this mindset can help set a foundation of collaboration and communication that is necessary for WBL success.



- A referral process is a plan for connecting a candidate with a work-based learning opportunity. There are two types of referral processes that we will look at here.
- One-Stop Referral:
  - In this referral process, the employer has a WBL opportunity and workforce staff source candidates coming into the One-Stop center for that opportunity.
  - This process helps workforce staff meet their goals for placements, training, etc.
  - And of course, this process means that the people in the workforce system – the people that workforce staff are charged to help – are in fact being helped.
- Employer Referral (also known as Reverse Referral):
  - In this referral, the employer brings a candidate of interest.
  - The candidate still needs to meet eligibility requirements (for example, the candidate may need to be WIOA registered.)
  - However, workforce staff can still suggest that the employer interview other people, that workforce staff provide! They could frame it as, "We'd like you to interview some of our people, and if you have people, that's good, too." Present it as a positive! The goal here is to give workforce-sourced candidates a chance, assuming that suitable candidates can be found.
- Key Points:
  - It's important to have a referral process set up for several reasons. First, it helps everyone be on the same page. Second, it helps simplify the process for our dual customers – candidates and employers. It allows staff to have a whole, cohesive

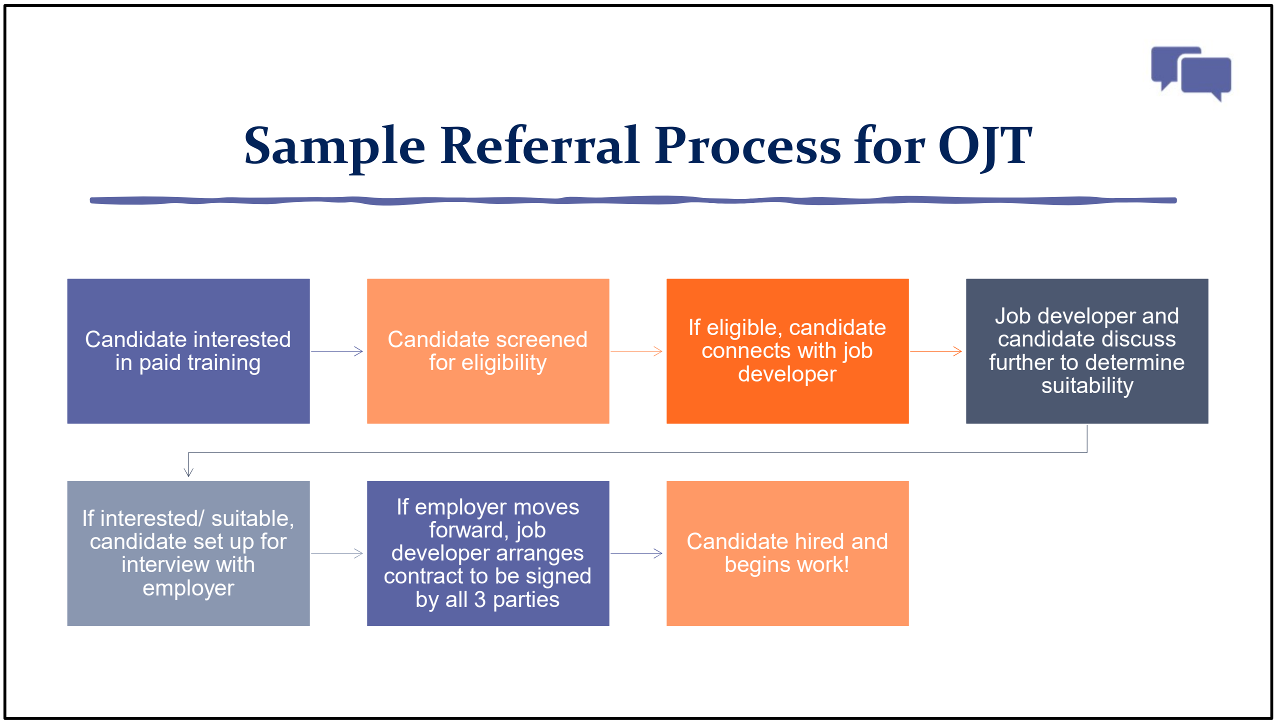
package that can show everything up front clearly and simply.

- A successful referral process should be understandable and clear.
- There should not just be a process for the employer to follow, but also an internal process! Everyone should understand how to handle candidates and employers, and how to manage expectations with whoever they interact with. Even staff who do not directly speak with candidates and employers should have a good understanding of WBL programs in general, the process, and how their role directly contributes to the success of WBL programs and the meeting of goals.

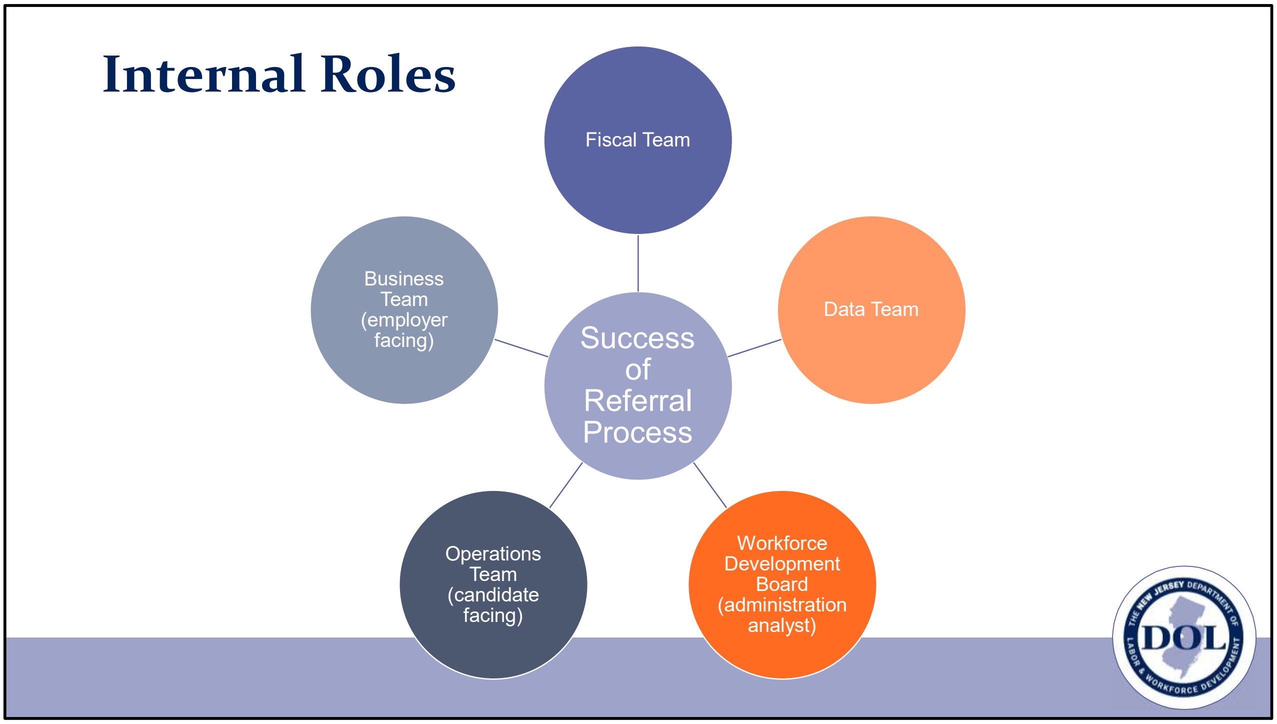
- Set up SOP.
  - Ideally your office has or will set up a standard operation procedure (SOP). An SOP is a document that clearly explains how teams and members function within an organization. SOPs improves consistency and help reduce miscommunication.
  - A referral process would exist within the SOP. Setting up an SOP involves establishing internal structure, and asking questions such as:
    - ✓ *Do we need to re-structure?*
    - ✓ *Do we need to re-assign people?*
    - ✓ *Do we need to change job descriptions or re-evaluate job duties?*
  - Important for staff to understand not just the why but the how
- Communication
  - Open communication is key to make sure all staff are aware of the process. Honest communication is especially important between the staff working with the candidates, and the staff working with employers. They need to converse about employer, job, candidate, experiences, etc. especially if you're doing "one-stop referrals" instead of "employer referrals". Candidates being referred from the one-stop center need to be marketed/championed and that only happen based on trust and communication.
  - Communicate clearly and realistically with both candidates and employers.
  - You don't want candidates to get disappointed so be mindful of expectations

you are setting for them; WBL is not just an open program – it is based on skills, employer needs, etc. Reinforce to the candidate: “You need to *get* this job.”

- Teambuilding
    - Make sure everyone is on the same page.
    - Emphasize how each team and role contributes to the success of WBL and to meeting the needs of their dual customers. Internal collaboration is especially important between those working with candidates, those working with employers, and those writing contracts.
    - Obstacles to teambuilding include the feeling of “who gets credit?” , a lack of clarity about roles, and working in a siloed way.



- Here is a sample referral process for an on-the-job training (OJT) program.
- Possible points to note:
  - This referral process helps everyone be on the same page.
  - It takes internal teamwork and communication to make this process work!
  - Different roles and teams are all responsible for managing expectations with the dual customers – candidate and employer.
  - Eligibility is determined, but also suitability is discussed. Remember, eligibility doesn’t automatically equal suitability.
- Note: The point in sharing an example is not to encompass all the nuances possible, but to present a typical, realistic process and how it could play out.



- The success of a referral process is not dependent upon one person but upon a system or network of interdependent roles. Whether you primarily work with candidates, or with employers, or in another capacity, your role does in fact impact the referral process.
- In a One Stop Center, typical teams would include:
  - Fiscal Team
  - Data Team
  - Workforce Development Board (administration analyst)
  - Operations Team (candidate facing)
  - Business Team (employer facing)
- Who does what exactly may vary depending on the referral process that you set up.

Small Group Activity

Discussion Questions if you HAVE a referral process

1. What's working well?
2. Who is a part of your referral process? Who else *should* be a part of it?
3. What are challenges you face in your referral process? Brainstorm possible solutions.

Discussion Questions if you DON'T HAVE a referral process

1. What would be your first step in developing a referral process?
2. Who should be a part of your referral process and what role could they play?
3. What do you hope your referral process to be like? Not to be like?

Monitoring Progress Toward Goals

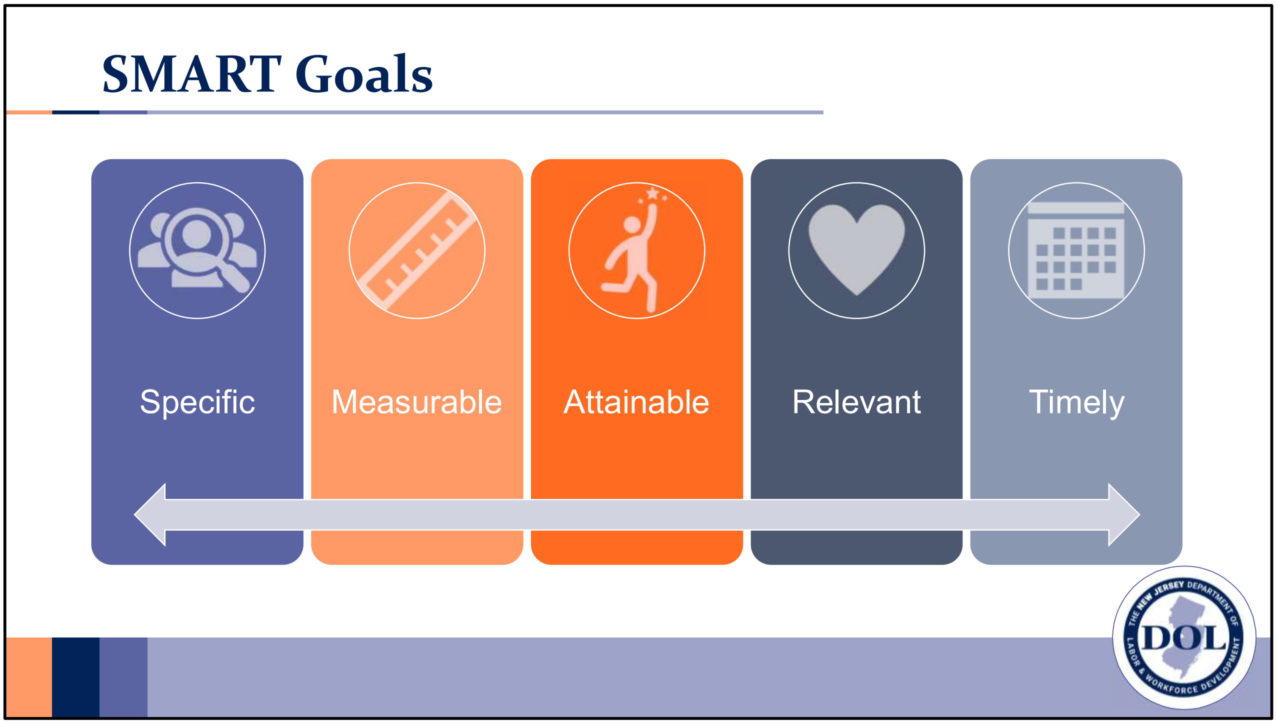
Metrics and WBL Success

Goals and Work-Based Learning

Why is it important to set goals with work-based learning?

How do you balance quality and quantity when setting goals?

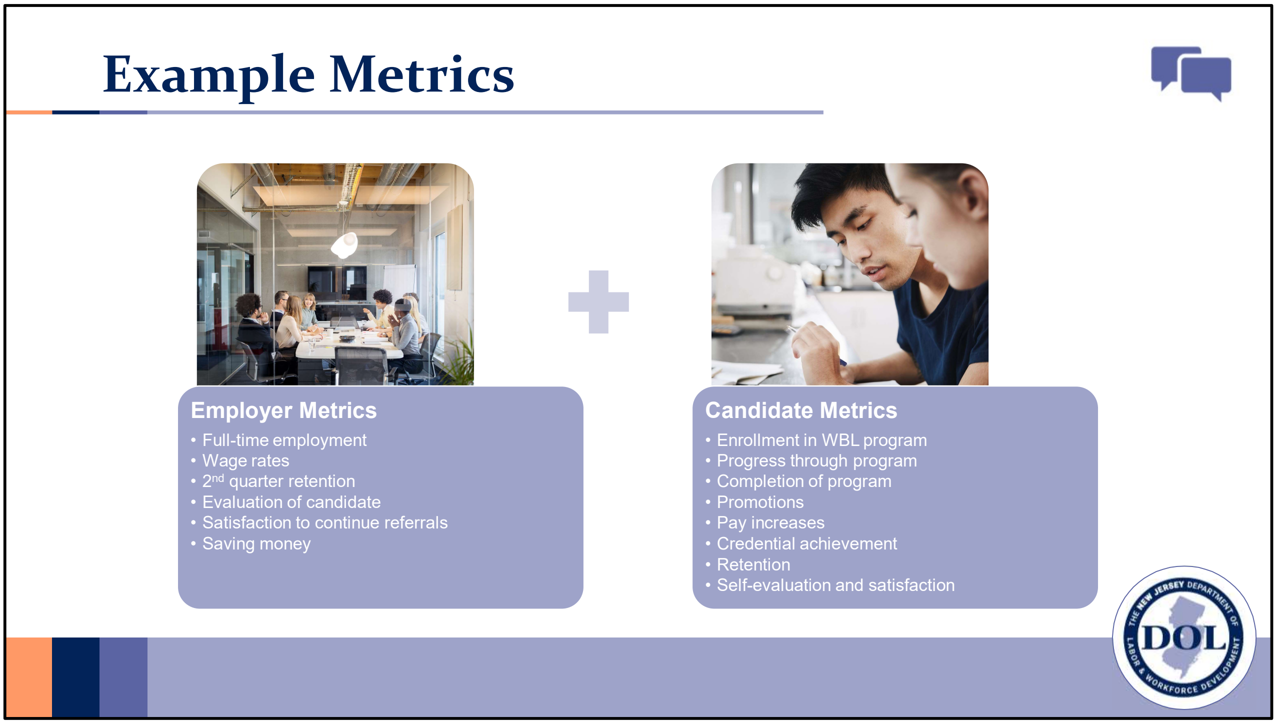
What are metrics and how do they relate to goals?



- Goals are most effective when they are SMART! SMART goals help us understand what we are actually trying to accomplish, communicate with funders, set clear metrics, and communicate goals with colleagues. This acronym can be applied to goals in any sector, including work-based learning.
- S stands for Specific.
  - Identify the Who, What, Where, When, Why, Which! Answer the questions: WHO is involved, WHAT do I want to accomplish, WHERE will it be done, WHY am I doing this (reasons, purpose), WHICH constraints/requirements do I have?
  - Define the goal as much as possible with no ambiguous language.
- M stands for Measurable.
  - Can you track the progress and measure the outcome?
  - Answer the questions: How much, how many, how will I know when my goal is accomplished?
- A stands for Attainable.
  - Is the goal reasonable enough to be accomplished? How so?
  - Make sure the goal is not out of reach or below standard performance.
- R stands for Relevant.
  - Is the goal worthwhile and will it meet your needs?
  - Is each goal consistent with other goals you have established, and does it fit with your immediate and long-term plans?
- T stands for Timely.

- Your objective should include a time limit. “I will complete this step by month/day/year.”
- Timeliness will establish a sense of urgency and prompt you to have better time management.

- In short, goals are where you are trying to get. For example, your work experience goal might be "In a program year, place between 10 and 20 young adults in work experience programs lasting at least 3 months at $13/hours."
- Metrics, on the other hand, are the ways you measure progress toward your goals. Examples could include:
    - Number of young adults placed in program
    - Monthly evaluations by youth as well as employer
    - Completion
    - Wage rate
    - HSE obtainment
    - Referrals for housing, transportation, Internet, childcare, mental health counseling; etc.



- Employer metrics could include:
  - Full-time employment
  - Wage rates
  - 2nd quarter retention
  - Evaluation of candidate
  - Satisfaction to continue referrals
  - Saving money
- Candidate metrics could include:
  - Enrollment in WBL program
  - Progress through program. It is helpful to establish common measures – e.g., most people are at point X by Y time. At the same time, you do want to be careful comparing one candidate to another.
  - Completion of program
  - Promotions
  - Pay increases
  - Credential achievement
  - Retention
  - Self-evaluation

- Well, it is beneficial to measure (and show) the team's progress toward goals for several reasons!
    - Drive team engagement and focus on contract goals. If team members know the "score" (how you are performing in your metrics) it helps them be more engaged individually and collectively.
    - Assist in planning strategy and execution. Team members can move forward effectively, and if something is not working, i.e. not impacting results in your metrics, people can change course.
    - Encourage big picture thinking. The saying, not seeing the forest for the trees, can apply here. It is important not *just* to stay in your own lane and do your own daily tasks, but also to connect the pieces and see your role in impacting contract goals. In addition, laying out your data can be useful in synthesizing information – for example, to notice how different metrics impact each other.
- WBL success depends upon everyone's work and buy-in!

Wrap Up

Before identifying employers and candidate profiles, consider your parameters of occupation, county/state/federal guidelines, qualifying candidate, and type of WBL.

Eligibility is determined by funding streams, applies to both candidates and employers, and should be communicated up front.

A clear, understandable **referral process** helps simplify WBL for both candidates and employers, and is also important for internal communication and collaboration.

For WBL success, know your **goals** – where you are trying to get – as well as your **metrics** – the ways you will measure progress toward those goals!

Preview of Next Module

In **Work-Based Learning 201: Lead Generation, Prospecting, and Getting Past Gatekeepers**, we will cover:

- Solving employer challenges with work-based learning solutions
- Identifying and attracting employers
- Reaching decision-makers
- Building rapport

Upcoming WBL Training Schedule

Module 201: Lead Generation, Prospecting, and Getting Past Gatekeepers	• Two options: Tuesday May 10th at 9am or Thursday May 12th at 1pm • Audience is staff working with candidates **AND** staff working with employers
Module 202: The Six Steps of the Sale	• Two options: Tuesday May 17th at 9am or Thursday May 19th at 1pm • Audience is staff working with employers
Module 301: Contracts, Invoicing, and Fiscal Trackers	• Two options: Tuesday May 31st at 9am or Thursday June 2nd at 1pm • Audience is the fiscal team **AND** staff working with employers

Thank You!

- Thank you for participating in this training! Have a great day!