LOS ANGELES COUNTY

WIA Adult and Dislocated Worker DIRECTIVE

NUMBER: D-DWA-03-008	**SUBJECT: BUSINESS SERVICES PERFORMANCE MEASURES**
DATE: 10/1/03	**EFFECTIVE DATE: IMMEDIATELY** **PAGE 1of 2**

TO: ALL WORKSOURCE CENTERS

Effective immediately, all WorkSource Centers (WSCs) receiving funding from the County of Los Angeles, Community and Senior Services (CSS) shall incorporate the three new Business Services performance measures that were approved by the Los Angeles County Workforce Investment Board on April 10, 2003. These performance measures are in addition to the WIA required performance measures for Adult and Dislocates Workers. Each WSC is expected to:

1) Visit ten (10) new businesses each month.

2) Make at least ten referrals to business assistance providers per month which can include new, past or existing businesses receiving services and maintain a Business Needs Assessment on such referrals.

3) Adhere to the WorkSource California Business Services Model and Protocols, issued on August 27, 2002. Some of the principles of the model include the following: Each WSC shall have at least one dedicated, full time Business Services Representative (BSR). A dedicated BSR does not carry a jobseeker client caseload, since they are to focus on the business customers. If a WSC is unable to fill a job order internally within 24 hours, then it shall be referred throughout the WorkSource California system. Unfilled job orders shall be e-mailed to the CSS Business Lead (presently Carmen de Arce at cdearce@css.co.la.ca.us) for distribution to the entire system. The standard forms developed for the WorkSource California system shall be used (see attached WorkSource California Business Services Model and Protocols and forms, which include Job Order, Candidate Referral and Business Needs Assessment).

A record of the businesses visited, and the referrals made must be submitted no later than the fifth day of the month for services performed in the preceding month. Either submit a copy of the Business Needs Assessment, or submit the attached form. The implementation of the Business Services Model will be monitored periodically by staff. Failure to comply with this directive will result in suspension or revocation of funding.

Submit the Business Services Performance Measures Monthly Report, by mail or by fax to:

L. A. County Community and Senior Services
Business Services Marketing Division Attn: Program Manager
3175 W. 6th Street. Box # 6
Los Angeles, CA 90020

Fax number: (213) 368-6003

If you have any questions regarding this Directive, please contact the Program Manager for the Business Services and Marketing Division, Geraldo Rodriguez, at (213) 738-2656.

Josie Marquez

JOSIE MARQUEZ, Director
Employment and Training

Attachment: 1) Worksource California Business Services Model and Protocols (includes Appendix of forms)

WorkSource California Business Services Model and Protocols

County of Los Angeles
Community and Senior Services

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Acknowledgments

We are proud and excited to kick-off the implementation of the WorkSource California Business Services Model. During the past year, staff from a broad cross-section of our WorkSource Centers worked along with Community and Senior Services staff and consultants, as part of our WorkSource Business Team, to refine and test the model, as well as its various forms and procedures. We wish to thank and congratulate the following dedicated and innovative WorkSource Business Team volunteers as we proceed now to our implementation phase: Elizabeth Magee, Jeanne Nicasio and Stella Acosta (El Proyecto), Paul Brynen (Jewish Vocational Services), Pamela Carson (Career Planning Center), Ray Gonzales (East LA), Francie Martindale (Career Partners), Joe Martinez and Angie Martin (Hub Cities), Davey Mitchell (Urban League), David Shinder and Jeff Pierce (LA Works), Sheila Wright (NE San Fernando Valley), Betty Haro, Terrence Wong and James Morris (Mid San Gabriel Valley), Sue Skowron (SASSFA).

Executive Summary

Although the Workforce Investment Act (WIA) requires WorkSource Centers to serve businesses as an equal partner, the vast majority of resources, services and expertise currently being provided through the WorkSource California system has been client (job-seeker) focused. The system currently serves businesses more as a means to an end (a placement opportunity) than as a targeted customer that requires equal attention and, therefore, client centered service.

The Business Service Model that is described in the following pages takes a fundamentally different approach to providing service through the WorkSource California system. It is based on the belief that by catering to, and effectively serving the needs of business, the system will develop long-term cooperative relationships with businesses. The Business Services Model is built on the role of the WorkSource Business Representative (Business Rep). The Business Rep will be the single point of contact providing businesses with access to staffing, workforce services and business assistance services. Rather than acting to place individual clients in their caseload, the Business Rep is responsible for identifying the needs of the business, informing them of service options, and then coordinating access to all resources available through all One-Stop Partners, Satellites, Youth Providers, Business Assistance providers, and the entire WorkSource California system to meet the needs of the business.

The new model focuses on a "system" approach providing guidelines, procedures, organizational structures, such as a system-wide continuous quality improvement team, and technology support, designed to leverage the resources of the entire system to serve the needs of businesses and job-seeking clients. Although the model does not discourage WorkSource Centers from developing additional services and programs designed to serve the unique needs of their market, it does require a standard approach to serving businesses and to consistently supporting the entire WorkSource California system not just the individual WorkSource Center.

The Business Services Model focuses on identifying the needs of business as the best opportunity to support workforce and economic development. Equal attention is given to identifying businesses that will provide opportunities for the clients of the WorkSource California System. The Business Rep must balance the needs of serving business with the needs of identifying businesses that will work with their WorkSource Center to provide jobs and skill-building opportunities for WorkSource Center clients (including clients with barriers to employment).

The model is business focused and it must also be marketing-directed. A significant component of the model relies on the implementation of continuous marketing research and planning to identify the best businesses to target based on economic goals and the current WorkSource California system labor pool, as well as the clients the system needs to recruit (and/or the training it needs to develop) for existing clients to serve the unmet needs of businesses. This market research, planning and the related promotion needs to occur both on a system-wide basis and at the local WorkSource Center level.

Model and Report Structure

This report serves as the written description of the business services model based on the critical functional components necessary to establish an effective business service delivery. Inherent in the model design is a focus on building a system-wide WorkSource California delivery system as opposed to an individualized approach. Thus, the components and protocols in the design are structured to support all WorkSource Centers.

This report identifies and describes the key functional components of the model and the principle elements of those functions.

The Model Components:

The model design is based on functional components rather than prescribed organizational structures to allow each WorkSource Center to implement the model based on their organizational assets and the needs of their community. However, all WorkSource Centers must support a system-wide approach to serving businesses by providing all functional components of the model and by meeting the quality control protocols and standards listed in the appendix.

Key Model Definitions

These definitions are included since a number of terms are used that could be interpreted in different ways.

System – The model is designed to encourage cooperation and coordination among all WorkSource Centers and their partners (EDD, DPSS, Economic Development, Community Colleges). The WorkSource California "system" includes all of these organizations and their staff and requires that these organizations work in a cohesive approach to serve businesses.

WorkSource Center – When the term WorkSource Center is used it refers to the full service WorkSource Center operators (and their staff) as funded by the County of Los Angeles Workforce Investment Board. Most of the report focuses on WorkSource Center operators as the ultimate source of business service delivery. But it is expected that the operators will encourage all of their One-Stop Partners, particularly those involved in outreach and services to businesses, work together and provide seamless business services since this is inherent in the "operator" role as required by WIA law.

One-Stop Partners – includes EDD, DPSS, Economic Development Groups, Community Colleges and all organizations designated by the Workforce Investment Act as required One-Stop partners.

Business Rep – This model explicitly distinguishes between the role of a Business Rep versus a typical Job Developer or Employment Specialist. The Business Rep will focus on the business as the client, working to understand their needs ranging from staffing and workforce development to business assistance. For most WorkSource Centers, Job Developers are the main point of contact with employers. They are typically assigned a caseload of clients and are responsible for placing these clients. This places emphasis on meeting the needs of the individual client, not the business.

Protocols – The protocols serve to identify procedures and guidelines that have been defined to ensure a systematic approach to quality control and effective customer service throughout the WorkSource California System. A comprehensive description of protocols for the business services model can be follows the model in this report.

Regional- Within the County of Los Angeles, regional refers to the eight Workforce Investment Areas; also referred to as the Los Angeles region.

Welfare-to-Work- There is no reference to Welfare-to-Work. It is mentioned here as a reminder that this model is not program, target population or funding source oriented but focuses on the customer and market. If the model is done properly, it should be of even greater benefit to individuals on welfare seeking work by creating more opportunities.

Model Components

1. Regional Marketing Campaign

The regional marketing campaign is a key component in the establishment of an effective business services model in the Los Angeles County region.

The regional campaign provides an opportunity to communicate the benefits of the new business services model to a much broader portion of the business community across the Los Angeles region. It is designed to increase recognition by the business community, establish a new brand name, "WorkSource California", and promote the reputation of the WorkSource California System's ability to serve businesses. Surveys of the business community have demonstrated that approximately 3-8% of Los Angeles area businesses are aware of the services available form the WorkSource California system, therefore, the marketing campaign is critical to establishing a market for services.

The marketing campaign also creates an opportunity to establish a focused access point for businesses seeking services since it will promote the (888) 226-6300 number to call for access to all services. Once the regional business services Website is established, we recommend that it should be promoted along with the toll free number. The following are the key goals of the Regional Marketing Campaign:

1. **Appeal to a larger target audience of businesses to increase their recognition and awareness of WorkSource Center services.**

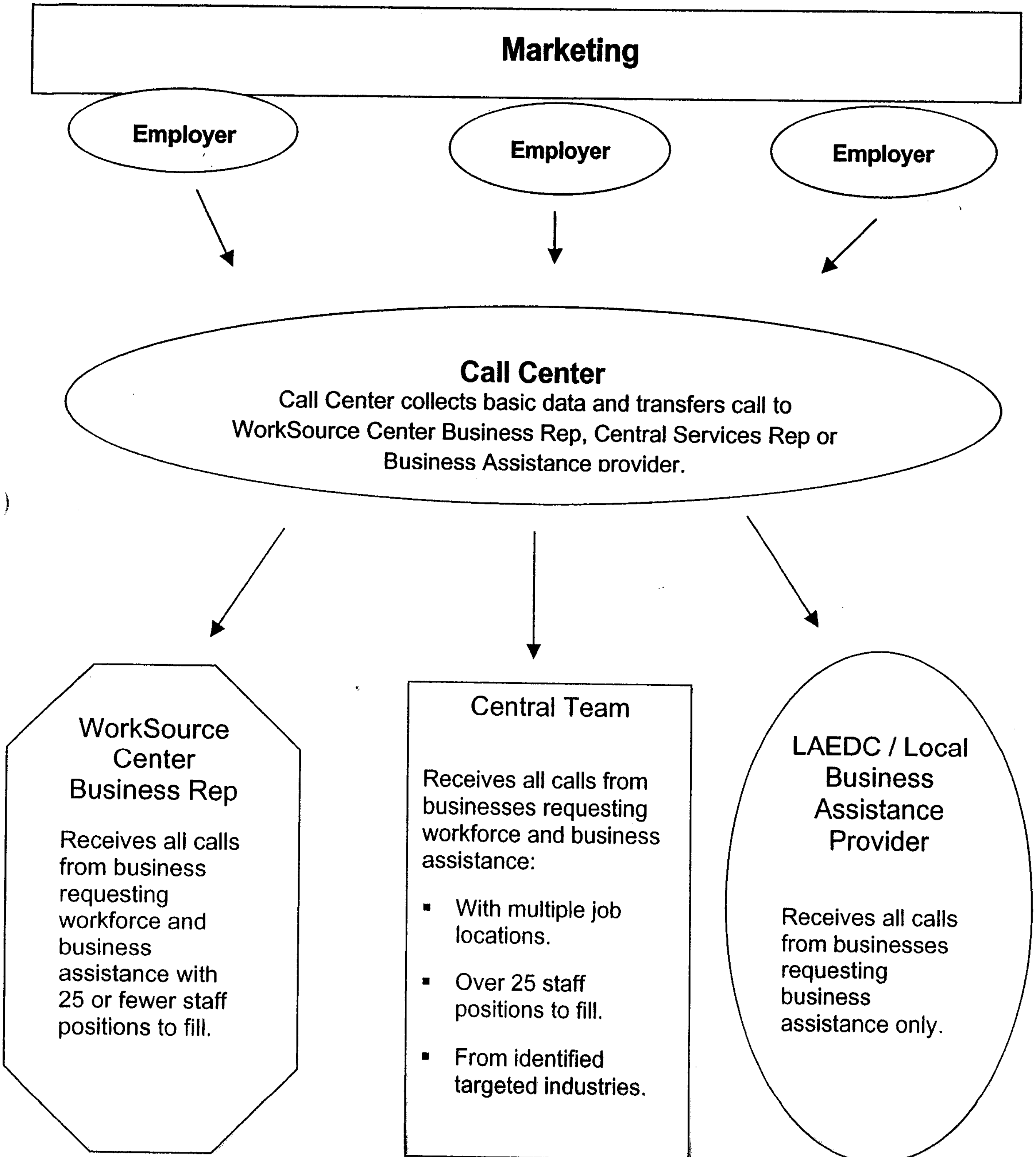
2. **Promote the image and reputation of the WorkSource California system to the business community.**

3. **Encourage businesses to utilize the WorkSource California system for both employment and business services.**

4. **Promote the (888) 226-6300 number and Website with calls directly connected to the local WorkSource Center, central team, or business assistance Center.**

5. **To become a preeminent provider of services to the business community.**

Regional Call Center Service Flow



2. Regional Call Center

The Regional Call Center serves as a convenient access point for all businesses seeking employment and business assistance. The toll free number, advertised in all marketing campaign materials, will establish one easy-to-remember number to gain access to all services provided by the entire region and specifically the Los Angeles WorkSource California system. This will establish the Call Center as the first point of contact for many businesses seeking assistance for the first time. The design and effective operation of the Call Center will be key to the success of the new business services model.

1. **Receives all calls from businesses from WorkSource California's regional marketing campaign.**

2. **Verifies the business' contact information and collects new information, including what services are needed.**

3. **Directly connects the business to the appropriate business service resource (WorkSource Center, Central Team or business assistance provider).**

4. **Generates and distributes activity and referral reports measuring calls received, what was requested, where the call was referred.**

5. **Follows up to measure satisfaction: random sample of businesses:**
   - The Call Center will survey a stratified sample of incoming business callers in order to measure their satisfaction.
   - WorkSource Centers' customer satisfaction surveys will assess the businesses' estimation of their performance, after service delivery is completed.

3. Regional Business Services Website

The Internet plays a major role in the building of image and the provision of services. Presently, www.WorkSourceCalifornia.com is the first point of access for many businesses and serves to direct them to the WorkSource Centers which will further assist them. An enhanced Website / portal is in the planning states. It will offer an alternative access point, creating more options to better serve businesses and job seekers.

The Website will support our efforts to build a system which is responsive to business needs. It is planned that WorkSource Center staff will be able to post jobs and client skill records and other business service activities. Once this function is in place, businesses that are interested in self-service will have direct access to the inventory of clients throughout the WorkSource California system. It is planned that the WorkSource California Website will play a key role in the delivery of business services providing:

1. **Self-Service Tools:**
   - A centralized job posting system to provide an electronic access point for businesses and job seekers. The Internet based job posting system will provide all businesses with self-service access to all job seekers across the WorkSource California System. All job seekers will also have access to all jobs that are posted.
   - A Search Tool that can be used to search for information on various business topics (much like google or yahoo).
   - A comprehensive listing of WorkSource California System and Central Team workshop schedules (for all WorkSource Centers) that allows businesses to register online.
   - Online forums with business experts in various areas.
   - Online workshops or seminars broadcasting a local WorkSource Center or Central Team workshop.

2. **Extensive information for businesses Including:**
   - A benefits oriented description of the menu of services available to businesses through the WorkSource California system.
   - Labor market information to assist businesses with decisions regarding wage rates, job levels and other relevant information.
   - City, state and federal incentives and tax Information.
   - Customized services.
   - Training resources.
   - Business assistance resources.
   - Links to other information resources already on the web.

3. **Linkages to other resources:**
   - Link to local WorkSource Center sites.

- Link to business assistance resources.
- Link to other specialty resource providers.

4. **Common marketing programs such as online newsletters and the promotion of new services as they are developed.**

5. **An online resource center for Business Reps and Job developers:**
   - List Serve resources can be provided to Businesses Reps identifying expert resources within our WorkSource California system on various topics or industries.

4. Central Team

The Central Team will support the development and ongoing operation of an integrated system for providing business services. The Central Team will provide ongoing support and assistance to WorkSource Centers (WSCs) while overseeing system implementation. This includes:

- Facilitate monthly coaching sessions with WorkSource Centers to assist in their local efforts to implement the model.
- Support large system-wide recruitments as needed.
- Assist WSCs in collecting labor market and employment info.
- Assist WSCs in connecting to business assistance resources.
- Support industry focused projects.
- Be available for ongoing support to WorkSource Business Reps.

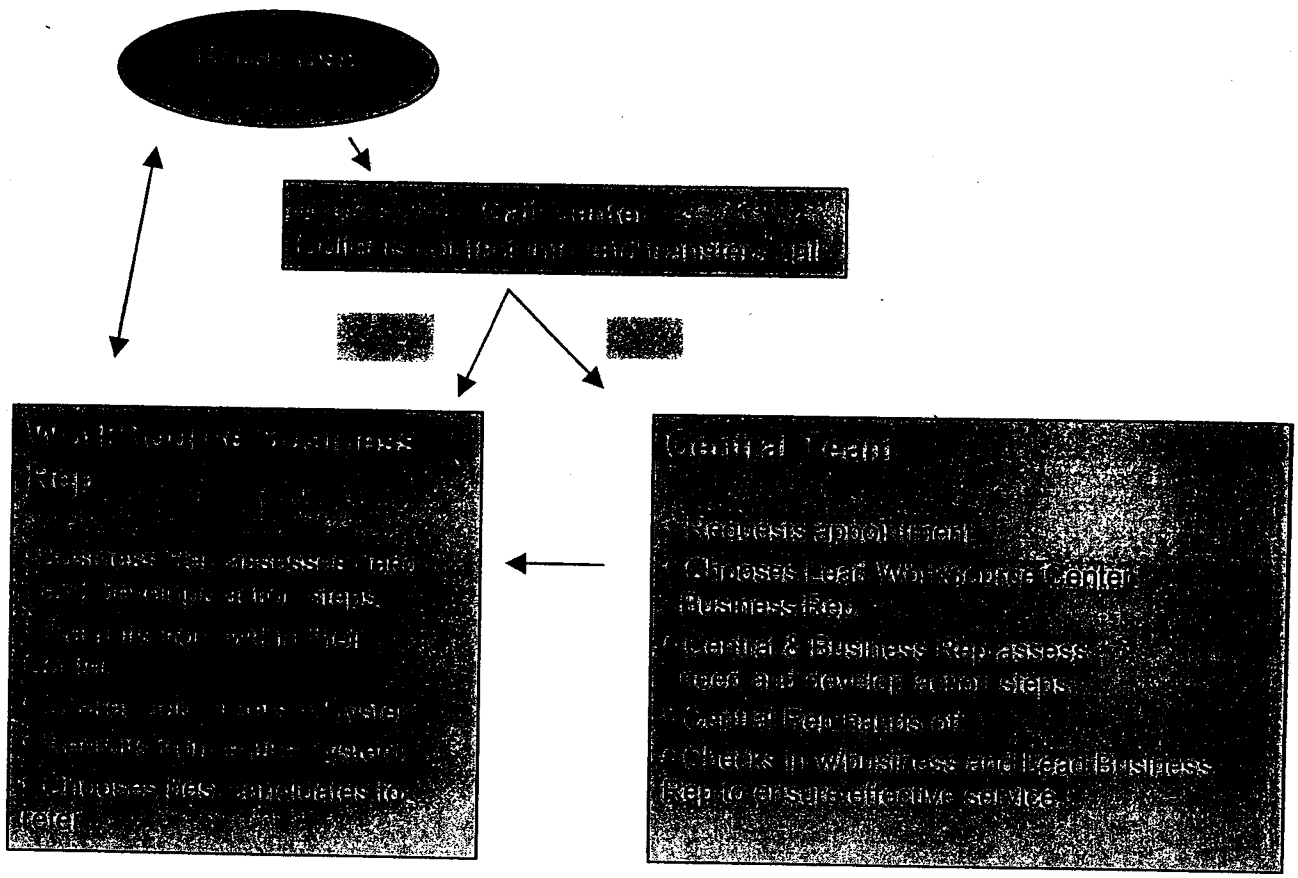
An important role of the Central Team to is to oversee the balance of the WorkSource California system so that there is equity in the sharing of jobs and labor and to assist in the development of local outreach strategies.

The following describes how Central Team members will work with WorkSource Center Business Reps on larger recruitments received from the Call Center (or those that result form the Central Team's own outreach efforts):

The Call Center will refer all calls from businesses requesting assistance in recruiting 25 or more staff to the Central Team. The Central Team Rep will:

- Choose a Lead WorkSource Business Rep to coordinate the system-wide recruitment based on the location of the jobs and invite them to the business meeting.
- Meet with businesses referred by the Call Center (or identified through targeted outreach) to assess their broader business service needs.
- In cooperation with the Lead Business Rep, complete the Service Plan Checklist including action steps identifying the business's needs, what resources can be provided through the WorkSource California system, and what hand-offs will be made to other business assistance partners
- Hand-off workforce needs to the Lead Business Rep but remain available as requested for assistance.
- Provide warm hand-off to business assistance partners when needed.
- Provide assistance to the Lead Business Rep, as requested, to work with the entire WorkSource California system to obtain the candidates needed to match the business's staffing needs by the Lead Business Rep.
- Check-in with the business and Lead Business Rep as needed to follow-up on service progress.

Business Service Flow



5. WorkSource Center Business Services Team

The WorkSource Center Business Services Team is ultimately responsible for the business relationship and for the delivery of services to the business. They prepare local marketing research and planning. They will implement targeted outreach, and the coordination of services, available throughout the WorkSource California system to businesses in their local community.

These efforts will be grounded in local marketing planning, based on knowledge of the local labor pool, including enrolled and universal clients, and of the industries and businesses in their area. Emphasis will be given to balancing the need to outreach to businesses based on knowledge of the occupations and skills of the local labor pool, while working with businesses to find solutions to skill shortages among the available labor pool.

The Business Rep will be responsible for coordinating the efforts within her/his WorkSource Center and across the entire WorkSource California system to meet business needs. The ultimate success of the WorkSource Center will rely on the establishment of an integrated approach to serving business customers and job seekers, stressing communication and coordination between intake and recruitment and business service delivery. The following describe the key roles of the WorkSource Business Services Team:

1. **Establish activities to encourage teamwork and define roles for One-Stop Partners in providing business services as part of the WorkSource Center Team.**
   - Establish an ongoing and intensive effort to coordinate with DPSS, EDD, Community Colleges, Economic Development and other One-Stop partners to develop integrated approaches to providing effective business service and coordinating effective intake and recruitment.

2. **Establish targets based on research and planning:**
   Identify the industries, trade groups and businesses to target based, on knowledge of the local business market and the local labor pool, including currently enrolled clients, universal clients, and the local community labor force. Establish priorities and business targets. Potential steps in developing targeting plans:

   - Establish a detailed profile of the local labor pool.
   - Identify occupations that the universal/core and enrolled/intensive clients are seeking and identify businesses most likely to offer those opportunities.
   - Work with One-Stop partners, local economic development centers, LAEDC regional efforts and others to coordinate targeting strategies and outreach efforts.
   - Identify key chambers in the market area to target smaller businesses as well as trade groups associated with industry targets.

3. **Develop and Implement a marketing plan and outreach effort for targeted businesses:**
   - Business Reps to be responsible for overseeing the marketing and outreach effort to targeted businesses, as determined in the planning process noted above.

4. **Provide Needs Assessment, complete Service Plan Checklist and develop action steps to assist businesses:**
   - Meet with businesses to assess their broader business service needs.
   - Complete Service Plan Checklist, including action steps identifying the business' needs, and what resources can be provided through the system.
   - Provide warm hand-off to business assistance providers when needed, but maintain business relationship.
   - Support a system-wide approach to meeting the business's staffing needs.
   - Request assistance from the Central Team as needed.

5. **Provide business service or provide warm hand-off to business assistance partners:**
   - Provide business with assistance in obtaining staffing and staff development services by coordinating with the WorkSource California system.
   - Provide business assistance directly, or through warm hand-offs to business assistance partners.
   - Maintain the business relationship when handing off to partners.

6. **Coordinate system-wide staff recruiting:**
   Whether staffing needs are identified through local WorkSource Center outreach efforts or via the Call Center or Central Team, the WorkSource Business Rep will:
   - Share/distribute jobs with all Business Reps across the WorkSource California system by the end of the next business day. The Lead Business Rep is contact on the order. The business contact information shall be suppressed.
   - Actively work within their WorkSource Center and with their One-Stop partners to identify qualified candidates.
   - Work with other WorkSource Centers referring clients as needed to meet the business's need.
   - Implement any necessary matching, screening or testing systems as requested by the business. Orchestrate any needed interviews
   - Request assistance from Central Team for system-wide recruitment, as needed.

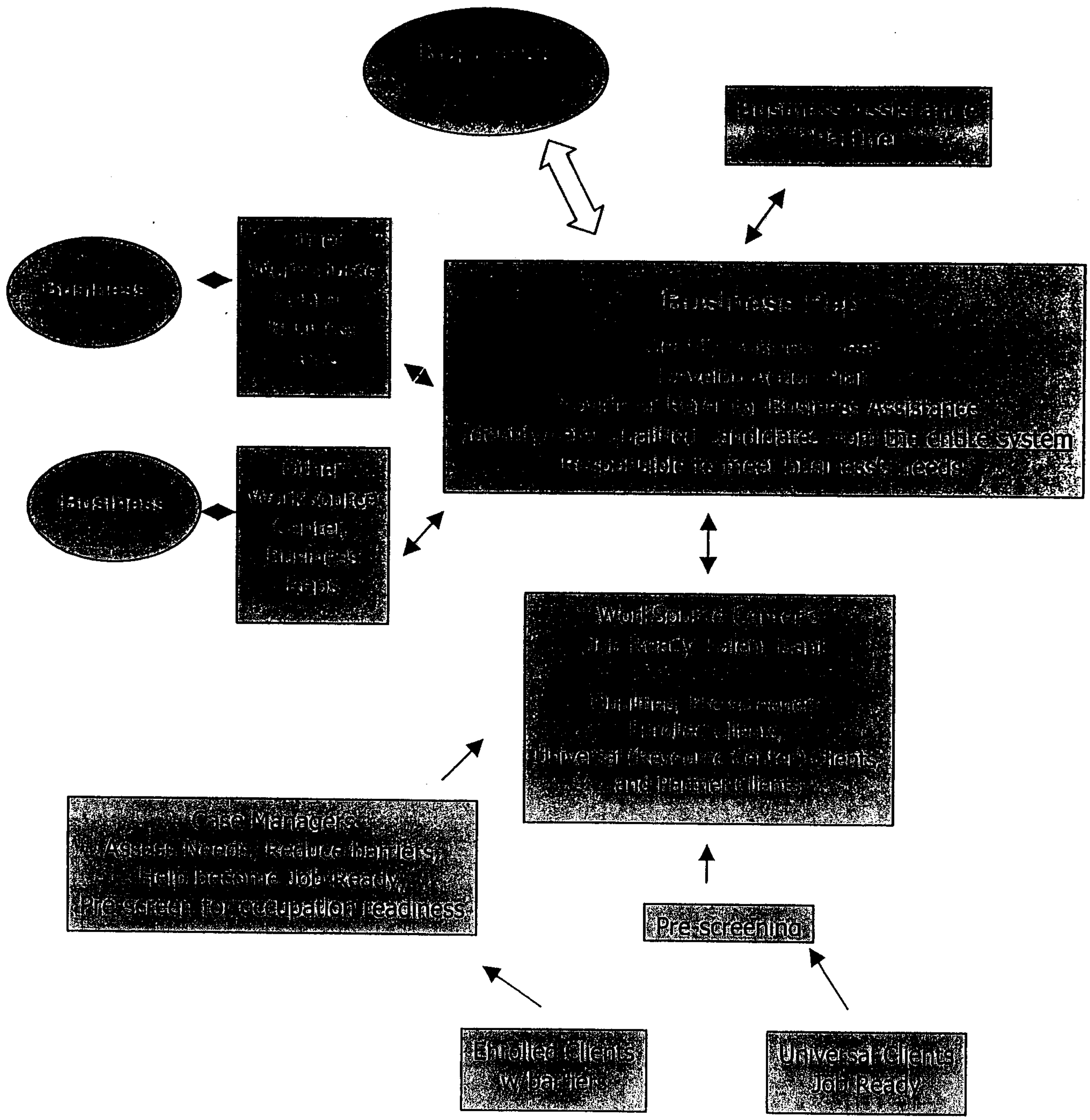
7. **Provide final quality control:**
   - Establish quality control as needed to ensure satisfaction that the best qualified candidates are referred to the business from within the WorkSource Center and from within the WorkSource California system.

8. **Follow-up to ensure effective service:**
   - Follow-up after resumes are referred, interviews have been held, and hand-off to other business assistance providers.
   - Encourage the business to call back to resolve any concerns or additional needs.

9. **Follow-up on hiring:**
   - Ask business to verify who was hired and report back to all WorkSource Centers.

10. **Make policy recommendations to the Central Team regarding Business Services.**
    - One Lead Business Rep from each Center shall participate in a system-wide WorkSource Business Team to discuss ongoing implementation of the model, to provide feedback and potential solutions, and to continually improve business services across the WorkSource California System.

Business Rep and Key WorkSource Center Roles



Key Role Differences

[illegible]	Business Rep
Focus on Placing Job Seekers.	Focus on Serving Businesses.
Have a Caseload Of Clients Assigned to Place.	Represent All Clients of the WorkSource Center & Have a Business Client Base to Serve.
Outreach to Employers to Place Individual Client Caseload.	Outreach to Businesses Based On Targeted Industries that Could Provide Career Opportunities for WorkSource Center Client Base.
Obtain Job Orders.	Provide Needs Assessment and Action Plan including Job Orders.
Provide Staffing Assistance.	Provide Business Assistance.
Focus on WorkSource Center Client Goals.	Focus on Providing Entire WorkSource California System Resources to Businesses.
Placement is the Goal.	Ongoing Business Relationship Building is the Goal. Placement is an objective.
Place their WorkSource Center's Clients.	Coordinate Staffing Recruitment from Entire WorkSource California System.
Responsible for client placement.	Responsible for quality control – sending the best possible candidates from the WorkSource System.
Employer Assistance.	Economic Development

5. Quality Control

The entire focus of the business services model is to provide quality customer service to businesses. Quality control and continual improvement are critical elements. A series of quality standards will be established, ranging from the use of common terminology, providing a single point of contact for business services, to controlling the quality of clients referred to businesses, and providing service on a timely basis. The following describe the key aspects of quality control in this model:

1. **A defined standard menu of business services offering various levels of service, based on the individual WorkSource Center's goals and capabilities:**
   - All WorkSource Centers will use the same definitions for the entire business services menu.
   - All WorkSource Centers will offer a standard level of Business Service, but beyond the standard, each WorkSource Center could develop service menus based on market need.
   - Fees may be charged for services beyond the standard service menu.

2. **A quality control process to ensure that Business Reps serve as a single point of contact referring the best possible candidates and best available business resources.**
   - In the database, code businesses which already have an established relationship with a specific WorkSource Center to the appropriate Business Rep at that center.
   - Business Reps check the contact management system before calling a business and defer to the Lead Business Rep if a contact has already been made.

3. **Quality control standards to ensure service is provided on a timely basis:**
   - Each function described in the model includes timeliness protocols and systems that remind Business Reps of these deadlines.

6. System Measurement

Measuring the new business services model can serve as a valuable opportunity to learn about the strengths and weaknesses of the model and the effectiveness of its implementation. As the business services model focuses on all WorkSource Centers working as a "system" to support businesses, measurements should focus on tracking the effectiveness of the "system" and the individual WorkSource Center's contribution to the system.

The WorkSource California system should choose key benchmarks to report to the Workforce Investment Board that monitor the health and effectiveness of the system while providing more detailed information to the WorkSource Centers to use as data for continuous improvement. Ultimately, a team of Central Team and WorkSource Business Reps should meet regularly to review the quality measurements to establish effective action plans for developing and improving business service delivery.

The 17 performance measures required by the Workforce Investment Act are focused on job-seeker services. Any additional system measurements need to be simple yet valuable for improving management and providing meaningful measurements of success. The following describe the key aspects of system measurement in this model:

1. **The 17 performance standards required by WIA are acknowledged.**

2. **Establish realistic, useful measures to track system-wide progress in the delivery of Business Services:**
   - Measure WorkSource California system service levels and achievements.
   - Measure local WorkSource Center contributions to the system.
   - Provide information for a continuous improvement process at the local WorkSource Center and system level including building capacity and developing new "product lines".

3. **Establish a system-wide Continuous Quality Improvement team comprised of central team and WorkSource Business Reps working together to resolve challenges and make improvements to the system.**

7. Technology

Extensive technology (both hardware and software) and ongoing training must support business service delivery in the WorkSource California system, in order to provide customer service at a level that will engender the trust and respect of the business community. The following role of technology in the business service model is in the planning stage:

1. **Online Business Database that is accessible by all WorkSource Center staff, Central Team and Call Center staff with an assigned single point of contact:**
   - The database would include all business with five or more employees in the Los Angeles region.
   - Additional information collected by the Call Center or WorkSource Center staff can be added to the database to build more comprehensive information about the business.

2. **Online Contact Management System:**
   - All business contacts, reminders of service and notes to be recorded and viewed in the contact management system by all WorkSource Center, Central Team and Call Center staff.
   - The Business Database would be linked to the Contact Management System.
   - Customer Satisfaction Surveys completed by the Call Center will be added to the Contact Management Database for future reference.

3. **Online Assessment Form and Service Plan Checklist:**
   - Collects assessment information to be added to Business Database for future reference.
   - Collects Service Plan information recapping what services will be provided and what referrals made.
   - Establish ticklers to the Business Rep for follow-up on service.

4. **Candidate list generation and Hiring Report:**
   - Allows Business Rep to establish a list of referred candidates (from all resources) and track who has been hired.

5. **Job posting Website enables easy access by businesses, job seekers and WorkSource California system staff:**
   - Provides job posting, job search, and job matching services.
   - Ability to suppress job orders and assign a lead Business Rep for all contact.

6. **Client Input system:**
   - A Client Input system that builds a Client Skills Record including client contact information, social security number and skills and experience that will facilitate

client matching.

- The Client Input system to be completed by Case Management staff (enabled through assigned username and password) for enrolled clients.
- Universal clients can build their Client Skills Record on a self-service basis and then search for jobs that match their skills and experience.

7. **Online Resume:**
   - Provides business with job seeker's resume.

8. **Online Help Center:**
   - Help Center is accessible to WorkSource Center and Central Team staff to identify potential resources and contacts within the WorkSource California System that are experts one certain topics or certain businesses and industries.

9. **Business Services Website:**
   - Provides easy access to businesses to search database on business topics and issues.
   - Lists current comprehensive WorkSource California system workshop schedule (for all WorkSource Center sites) and allows business to register online.
   - Links to various sites for identified business resources and local WorkSource Center site.

Business Service Model Protocols

Business Rep Protocols:

1. Establish and make available Business Rep contact list.
   - Establish at least one Business Rep for each WorkSource Center
   - Contact list should identify the lead Business Rep and any alternative business service staff that will handle WorkSource business calls or questions.
   - Provide contact list to all other WorkSource Centers, Call Center, and Central Team.

2. Implement standard WorkSource forms for collecting and communicating information:
   - Job Order Form.
   - Candidate Referral Form.
   - Business Needs Assessment Form and Service Plan Checklist.

3. Maintain integrity of the single point of contact (and business database).
   - Check the business database on whether a business customer is assigned to a particular Center before calling on a business.
   - If already assigned to another Center, the Business Rep must work through the Business Rep assigned as Lead.
   - If unassigned, Business Reps can call on the business and complete a Business Needs Assessment form. Once the Needs Assessment is completed, they may code the business customer.
   - Utilize sub-codes when there is more than one business location, hiring contact or Business Rep based on the business' preference. Sub-codes should establish unique entries for each business hiring contact and Business Representatives.

4. Assess business' needs and prepare service checklist.
   - Prepare WorkSource Business Needs Assessment Form to determine the business' needs then complete a Business Services Checklist including action steps.
   - Complete the Business Services Checklist by the end of the following business day (after the meeting with the business).

5. Conduct warm hand-offs to business partners by the end of the business day in which the service checklist is completed.

6. Share Job Orders and Candidates with the County WorkSource System.
   - Lead Business Rep (or Job Developer) **sharing** the Job Order is ultimately responsible to:
     - Meet the business's workforce needs.

- Communicate job orders to their WorkSource Center staff (job developers, career seeker services, case management and resource center) and WorkSource Center partners.
- Email the Job Order to all other Business Reps by the end of the business day, following the identification of the staffing needs, unless all the qualified candidates have already been identified.
- Coordinate recruitment efforts with WorkSource Centers.
- Control the quality of candidates referred to the business from their Center, their partners, and/or from other Business Reps in the system.
- Suppress contact information in the Job Order; list themselves as the contact when sharing with the system or in their Center.
- Complete and email or fax the Candidate Referral Forms to relevant WorkSource Center staff, updating them on the progress of their client referrals.

- Business Rep **receiving** the Job Order is responsible to:
  - Always list local Business Rep (self) as contact point when posting or sharing the job order within your center or with partners.
  - Not contact business directly.
  - Not allow clients to contact other Business Reps directly.
  - Ensure quality control of clients (enrolled or universal) that they refer to other Business Reps, as well as those referred by other Job Developers from their WorkSource Center.
  - Complete and email or fax a Candidate Referral Form for all clients being referred to other WorkSource Center Job Orders.

7. Follow-up with business after completion of each action step.
   - Lead Business Representative will make contact within 48 hours of completing each action step in the business services checklist.

8. Perform customer satisfaction survey.
   - A third party within (or outside) WorkSource Center will implement a customer satisfaction survey.
   - The survey will be conducted no later than the end of the month in which the service delivery is complete.

Job Developer Protocols

1. Maintain integrity of the single point of contact and business database.
   - Check the business database to determine if a business customer is assigned to another Center before calling on a business.
   - If already assigned to another Business rep or Job Developer, the Job Developer must work through the assigned Lead.

- **If unassigned, Job Developers can call on the business, in cooperation with their Center Business Rep) and complete a Business Needs Assessment Form. Once the Needs Assessment is completed, they may code the business customer.**
- **Utilize sub-codes when there is more than one business location, hiring contact or Job Developer <u>based on the business' preference</u>. Sub-codes should establish unique entries for each business hiring contact and Job Developer.**

2. Share Job Orders and Candidates with the WorkSource system.
   <u>Job Developers share all Job Orders</u> either by directly implementing the following protocol or through their Business Rep. They are responsible to:
   - Meet the business' staffing needs
   - Communicate job orders to their WorkSource Center staff (career services, case management and resource center) and WorkSource Center partners.
   - Email the Job Order to all other Business Reps by the end of the business day following the identification of the staffing needs, unless all qualified candidates needed by the business have been identified within the Center.
   - Coordinate recruitment efforts with WorkSource Centers or have the Business Rep do so.
   - Control the quality of candidates referred to the business from their WorkSource Center and/or from other Business Reps in system.
   - Suppress contact information in the Job Order, listing themselves as the contact when sharing with the system or within their Center.
   - Complete and email or fax Candidate Referral Forms to relevant WorkSource Center staff updating them on the progress of their client referrals.

- **<u>Job Developers receiving Job Orders must refer appropriate clients</u>** either directly to other Business Reps/Job Developers who shared the Job Order, or through their own Center Business Rep. They shall:
  - Always list themselves or the local Business Rep as contact point when posting or sharing the job order within their center or with partners.
  - Not contact business directly.
  - Not allow clients to contact other Business Reps/Job Developers directly.
  - Be responsible for quality control of clients (enrolled or universal) that they refer to other Business Reps and Job Developers.
  - Complete and email or fax a Candidate Referral Form for all clients being referred to other WorkSource Center Job Orders.

Business Call Center Protocols

1. Collect information and maintain database (electronic or paper).
   - Collect business data: name, contact name, industry, street and e-mail address, and phone and fax numbers.
     a. If the customer is listed in the database, confirm the industry stated against the database.

b. **If the customer is not listed in the database, use the industry stated by the business caller.**

- **Determine services required: business or workforce services.**
    a. **If workforce assistance services are required, verify the number of jobs available.**
- Solicit preferences: working with a particular WorkSource Center or contact person.
    a. If the customer confirms a working relationship with a WorkSource Center or contact person, or otherwise expresses a preference, refer the customer to the stated Center and person.

2. Transfer calls to the service providers.
    i. Connect business caller to the WorkSource Center Business Rep closest to where the jobs are located if the business is requesting workforce assistance for less than 25 staff.
    ii. Connect business caller to LAEDC or other business assistance provider for business calls requesting business assistance only.
    iii. Connect business caller to the Central Team for businesses requesting workforce assistance for more than 25 staff.

3. Regularly report on Call Center activities.
    - Report by date, the name of business and industry, WorkSource Center transferred to, and services requested.
        - Suppress all other contact data that may have been previously collected.
    - Report totals for number of calls, unique business names or contacts, service Center contacted and services requested.
    - Reports issued in monthly, quarterly and annual year-to-day formats.
    - Distribute reports to Business Reps, Call Center, WorkSource Center management, and CSS management.

4. Measure and report on customer satisfaction.
    - Perform monthly phone survey of customer satisfaction.
        - Prepare stratified sample by service provider (WorkSource Centers, LAEDC, and Central Team).
        - Randomly select ten percent of calls referred to each service provider.
        - Perform phone survey of sample, and track results.
    - Report results of monthly customer satisfaction survey.
        - **Issue report in monthly, quarterly and annual year-to-day formats.**

Central Team Protocols

1. Handle calls referred from the Call Center (large recruitments) and set appointment

with business customers.

2. Select a Lead WorkSource Center Business Representative to handle workforce needs and invite them to the business appointment.
   - Base selection on location(s) of jobs available.
   - If the Business Representative and associates are unavailable for the appointment, identify and contact another Center to serve as the Lead Business Rep and proceed with the appointment.
   - Indicate assignment of Business Rep in business database.

3. Complete a WorkSource Business Needs Assessment Form to assess the customer's needs.
   - Complete the needs assessment with the Business Rep if possible.

4. Prepare a WorkSource Service Plan Checklist.
   - Work with the Lead Business Reps to prepare the checklist. Indicate customer needs, services and actions, resources, business assistance partner hand-offs, milestone and completion dates for each action.
   - Complete checklist by the end of the next business day following the meeting with the business.

5. The Central Team Rep will follow up to verify that job leads handed off to WorkSource Centers were posted within the 48 hour timeframe if appropriate.

6. Assess progress of warm hand-off arrangements.
   - Contact business customer and Lead Business Representative within 48 hours of hand-off to verify progress.
   - Contact Business Rep if additional service opportunity exists, as evidenced by feedback obtained from business customer follow up.

Quality Control Protocols:

1. Implement standard WorkSource forms for collecting and communicating information:
   - Job Order Form.
   - Business Needs Assessment Form and Service Plan Checklist.
   - Candidate Referral Form.

2. Establish common definitions for all services provided.
   - Common definitions must also be developed for business services that are offered beyond the required standard menu.

3. Create Continuous Quality Improvement (CQI) Team.

- CQI Team to be composed of business service representatives across the WorkSource system and representatives from the Central Team.
- CQI Team to review time-oriented protocols and determine the ability to meet these protocols through adjustments to process or by adding support to the system.
- CQI Team should review whether jobs referred to WorkSource Centers were posted on a timely basis.
- The Central Team Rep will follow up to verify that job leads handed off to WorkSource Centers were posted within the 48-hour timeframe.
- CQI Team should monitor distribution of jobs and labor in the system to help determine appropriate strategies for providing balance in the system between WorkSource Centers that are labor rich and job poor and visa-versa.
- CQI Team should regularly review Call Center data management, referral, surveying, and reporting processes and practices.
- CQI Team should provide feedback regarding potential enhancements.

4. Identify training needs for Business Reps and other WorkSource Center staff.

5. Create standardized customer satisfaction survey for all WorkSource Centers' use.

6. Create a standard code of conduct requiring adherence to:
   - Protocols and single point of contact.
   - Sharing job orders based on the best interest of the business.
   - Customer driven services and providers.
     - Businesses decide which WorkSource Center and representative with which to work.
     - Central Team representatives will confirm business preference for a specific WorkSource Center and representative.
     - If a business requests a different service by a Center or business representative than that listed in the database, Central Team Reps will document confirmation of the stated business customer preference. The business preference determines the final decision.

Appendix

Forms and Procedures

- Candidate Referral and Hiring Form, and Instructions
- Job Order Form, and Instructions
- Business Needs Assessment Form

WorkSource CALIFORNIA
Building Business and Careers

Candidate Referral & Hiring Report

Agency Name:		Date:
Business Rep:	Phone#: Fax#:	Email:
Name of Business Recruiting For:	Position/Job Recruiting For:	JO#

Candidates Referred for Interviews					This section for Lead Bus. Rep use only!				
Name	Enrolled	ID# (if available)	Have OJT ?	Will Refer Candidate	Interview Date	Needs OJT	Hire Date	Wage
1									
2									
3									
4									
5									
6									
7									

WorkSource
CALIFORNIA
Building Business and Careers

Instructions For Candidate Referral & Hiring Form

Complete this form each time you want to refer candidates to another WorkSource Center Business Rep for a specific Job Order. You may also attach resumes.

Agency Name: Name of your agency that is referring the job seeker/candidate.
Date: Date of referral
Business Rep: Business Rep who is making the referral
Phone, Fax & Email Address: phone, fax and email address of Business Rep referring candidates
Name of Business Recruiting for: from job posting
Position/Job Recruiting For: from job posting
JO # - Job Order # from the Job posting

For Agency Referring the Candidate:

1. List the candidates you are referring and note whether each candidate is enrolled or not.
2. Assign an Identification # to each candidate you are referring. Use existing ID# your center uses if one already exists.
3. Note whether OJT funds are available for these candidates.
4. Attach resumes and fax or email to the Lead Business Rep.

For Agency Receiving the Referral:

1. Note which candidates you plan to refer to the business.
   - If the box beside a particular candidate is not checked, (s)he will not be referred to the business.
2. Then email or fax this form back to the Business Rep that sent it.
3. Once the candidate has been interviewed, note the date.
4. Based on the interview, if the candidate will need OJT, note it.
5. Then email or fax back the form to the Business Rep that sent it.
6. Note if the candidate was hired and note the starting wage, then email or fax it back to the Business Rep that sent it.
7. Complete the employment verification form and fax/mail it back to the Business Rep that referred the candidate.

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Building Business and Careers

Job Order Form

Company / Business Information

Company Name:		Company Phone # ( ) –
Company Address:		
City:	State:	Zip:
Contact Name:		Contact's Title:
Contact's Phone: - - Ex	Contact's Fax: - -	Contact's E-mail:
Secondary Contact Name:		Secondary Contact's Title:
Secondary Contact's Phone: - - Ex	Secondary Contact's Fax: - -	Secondary Contact's E-mail:
Industry Category:		NAICS or SIC code:

Job / Position Information

Job Title / Position	Job Order Date: Job Order #:
Job Duties:	
Job Duties:	
Job Duties:	
Job Location #1:	
Job Location #2: (If more than two locations please list them on the back in note section):	

Job Start Date:	# Of Jobs Available:	Part Time: ☐	Hours/week:	Full Time: ☐	Hours/week:

Daily Hours	Monday to	Tuesday to	Wednesday to	Thursday to	Friday to	Saturday to	Sunday to	**Overtime Required?**

Temporary ☐ Contractor ☐ Permanent ☐ OJT ☐ Work Experience ☐

Dress Code:	Business ☐	Business Casual ☐	Casual ☐	Uniform ☐	None ☐

WorkSource CALIFORNIA
Building Business and Careers

Job Order Form

Employee Benefits

Medical ☐	Vision ☐	Paid Vacation ☐	Paid Sick Leave ☐	Investment Plan ☐
Dental ☐	Paid Holidays ☐	Tuition Reimbursement ☐	**Probation Period:**	

Other Benefit Details:

Exempt ☐ Non-Exempt ☐ | Union ☐ Non-Union ☐

Wage Rate: to Hourly ☐ Weekly ☐ Monthly ☐ Annually ☐

Required Skills and Education

Non High School Grad ☐	High School Diploma ☐	BA/Bs Degree ☐	PhD ☐	Typing Speed (wpm):
GED ☐	AA Degree ☐	Masters Degree ☐	MD ☐	10 Key (spm):

Special Certificates / Training:

Specific Skills required:

Minimum Experience Required:

English Proficiency ☐ Speak Fluently ☐ Understand Directions ☐ Read ☐ Write ☐

Proficiency in other ☐ Speak Fluently ☐ Understand Directions ☐ Read ☐ Write ☐
Language: ____________

Software Knowledge: Word Processing ☐ Spreadsheets ☐ Data Base ☐ Dedicated Data Entry ☐

Other:

Application Process:

Describe the Application Process:

Resume Required ☐ Scanable Resume ☐ Email Resume ☐ Fax Resume ☐ References Required ☐ Salary History ☐ Application ☐

WorkSource Center: | Job Order Completed by:

Lead Business Rep: | Lead Business Rep Phone #: - - ex

Notes:

WorkSource CALIFORNIA
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Job Order Form field Descriptions

The Job Order Data Entry Form is intended for use by WorkSource Job Developers and Business Service Representatives to provide the necessary information regarding the job. The WorkSource staff and job seekers could use this information as a resource for making appropriate matches between skills, experience and job requirements.

Company / Employer Information

1. **Company Name:** Name of company hiring
2. **Company Address:** Street number & name where the company is located
3. **City:** City where the company is located
4. **State:** State where the company is located
5. **Zip:** Postal zip code of the company
6. **Company Telephone:** Phone number for the company
7. **Company Contact:** Name of the person within the company who can assist with answers to questions
8. **Contact's Title:** Contact's position title
9. **Contact's Phone:** Contact's direct line including extension
10. **Contact's E-Mail:** The Contact's direct E-mail
11. **Contact's Fax:** The fax that the contact uses
12. **2nd Contact:** Name of a different person, other than primary person who can help
13. **2nd Contact Title:** Title or position of second contact
14. **2nd Contact's Phone:** 2nd contact's direct line & ext.
15. **2nd Contact's E-Mail:** 2nd contact's direct e-mail
16. **2nd Contact's Fax:** The fax that the 2nd contact uses
17. **Industry Category:** The industry category from accompanying list
18. **NAISC / SIC:** The code from the accompanying list

Job / Position Information

19. **Job Title / Position:** Name or title of the job position
20. **Order Date:** Date the job order was taken and/or submitted
21. **Job Duties:** Describe the position and the duties it entails
22. **Job Location(s):** Address that will be the base for the position
23. **Job Begin Date:** Date the worker begins
24. **# of Jobs:** Number of jobs the company is hiring for this position
25. **Status:** Check the box for full time, part time, permanent, contractor or temporary which ever accurately describe it
26. **# Hours / Week:** Number of hours per week
27. **Monday___ to ___:** the actual start & stop for Monday
28. **Tuesday ___ to___:** the actual start/stop for Tuesday
29. **Wednesday__to___:** Actual start/stop for Wednesday
30. **Thursday___to___:** Actual start/stop for Thursday
31. **Friday___to___:** Actual start/stop for Friday
32. **Saturday___to___:** Actual start/stop for Saturday
33. **Sunday___to___:** Actual start/stop for Sunday if any
34. **Overtime:** Will overtime be required?
35. **Dress Code:** Check the box if there is any dress code

Wages and Benefits

36. **Wage Range:** Range that the position pays and check the time unit of the wage range (hourly, daily, weekly, monthly, Annually)
37. **Probation Period:** The length of time of the probationary period
38. **Exempt:** Check this box if position is exempt from overtime
39. **Non-Exempt:** Check this box if position pays overtime
40. **Union:** Check this box for Union membership if applicable
41. **Benefits:** Check the box for the benefits the worker will receive (medical, dental, etc.)
42. **Describe Details:** List any benefit/s not checked previously, but which the worker will receive

Skill and Education Requirements

43. **Education:** Select the level of education needed by the worker as stated by the employer and check the appropriate box
44. **Minimum Experience Required:** Exp. in years or credentials
45. **Software Knowledge:** List the software skills required
46. **Special Certificates/Training:** List any special certificates of education, licenses or credential required by the position
47. **Skills:** List all related skills the position requires
48. **English Proficiency:** Check each box indicating the competency the position requires
49. **Other Language Required:** Name of other language required besides English
50. **Proficiency Required:** Check each box indicating the competency with the other language required
51. **Application:** Check this box if an application is needed
52. **Application Process:** Give a listing of the process with a timeframe
53. **Resume:** Check the box if a resume is requested
54. **Scanable Resume:** Check this box is the resume must be scanable
55. **Salary History:** Check this box if a salary history is required
56. **References:** Check this box if references are required

WorkSource Center Information

57. **WorkSource Center:** Name of the WorkSource Center that employs the person completing the form
58. **Job Order Completed by:** Name of person completing the form
59. **Lead Bus Rep:** Name of the Lead Business Rep of the center of the person completing the form
60. **Lead Bus Rep Phone #:** Phone number of the Lead Business Rep including extension
61. **Notes:** Any special notations or memos FYI you want to remember

WorkSource CALIFORNIA
Building Business and Careers

Business Needs Assessment

Date: Assessment By:

Company Name:

Contact Name: Title:

Address: City: Zip:

Phone: Fax: Email:

Do you do the hiring: yes no: If no, who does: Title:

Industry, NAICS or SIC code: Details:

Principal product or service: Multiple Locations: ☐ yes ☐ no If yes, how many?

Years in business: No. of employees at this location:
☐ Part time ☐ Full time

What are the most significant factors affecting your business today?

Given the factors discussed, what are your current needs?

Business Assistance

☐ Marketing/Business Planning Help
☐ Financing/Access to Capital
☐ Tax Credit and Other Economic Incentive Information
☐ Relocation Incentive Information
☐ Technology/Manufacturing Assistance
☐ Import/Export Information
☐ Labor Market Information
☐ Permit Assistance
☐ Entrepreneurial Training
☐ Other (explain)____________________________________

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Business Needs Assessment (cont'd.)

What changes do you forsee in your business in the next year: ______

In the next 5 years: ______

Do you have difficulty finding qualified employees: ☐ yes ☐ no. If yes, describe the challenge.

Do you have difficulty retaining qualified employees: ☐ yes ☐ no. If yes, describe the challenge.

Does your company provide benefits: ☐ yes ☐ no

What type of training do you provide your employees? ______

Given the factors discussed, what are your current needs?

Staffing and Training

- ☐ Employment Candidates
- ☐ Retention Assistance
- ☐ Current Employee Training
- ☐ New Hire Training
- ☐ Lay off, Downsizing, Outplacement
- ☐ Interview Room
- ☐ Human Resource Workshops

☐ Other (explain) ______

WorkSource CALIFORNIA
Building Business and Careers

Business Needs Assessment

How can we help you with staffing needs today?: ______________________________

____

How many different positions do you need filled? ☐1 ☐2 ☐3 ☐4 ☐5 ☐6+ ☐10 ☐11+ ☐20+
NOTE: Please complete a separate job order form for each type of position being filled.

Let me describe some of the various ways we can assist you so that we can choose the options that best meet you needs (note describe those options below that make the most sense for the business, do not read all options):

Self Help Options: In these options we'll list the jobs for you and all candidates will respond directly to your appointed staff.

☐ Post job orders in the Center.
☐ Post job orders on CalJobs. (This option requires your Taxpayer ID#: ______________________).

Recruitment: In these cases we will work with our entire county-wide WorkSource system to help recruit the candidates to meet your needs. In all of these cases we can provide interview space or work with your office interview space.

☐ Mass Recruitment - we will identify qualified candidates based on resume skill matching then arrange a mass-interviewing process with your staff.
☐ Prescreening - in this case we will take it a step further and personally pre-screen all candidates based on your requirements before referring finalists on to your staff for interviews.
☐ Application Completion - in addition to or instead of pre-screening we can ask all candidates to complete your employment application and refer all applications to your staff for final review before choosing candidates to interview.

Training Options: Based on your needs we may be able to arrange training that may include on the job training or classroom training or both.

What type of training do you think you need:

☐ Training for current employees
☐ Training for new hires
☐ Other
☐ Technology Training
☐ Technology Training
☐ ESL or VESL

Explain ______________________________

What additional hiring needs do you anticipate over the next 6 months?

Position ______________________ Number _____ Est. Date __________
Position ______________________ Number _____ Est. Date __________
Position ______________________ Number _____ Est. Date __________

What additional positions will be added because of a change in your business? ______________________________

Will there be any additional training needed because of a change in your business? ______________________________

BusNeed_assmt3.eps

WorkSource CALIFORNIA
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Business Service Checklist
(This form to be completed by staff)

Date: Completed By:

Key areas of concern:

___ Financing ___ Staffing ___ Mar keting

___ Human Resources ___ Business Planning ___ Entrepreneur ial Training

Steps recommended to client: Provider:

1. ______________________ ______________

2. ______________________ ______________

3. ______________________ ______________

4. ______________________ ______________

Service Referral to: Date:

Service to be provided: Follow up date:

Service Referral to: Date:

Service to be provided: Follow up date:

Service Referral to: Date:

Service to be provided: Follow up date:

Service Referral to: Date:

Service to be provided: Follow up date:

NOTES:

BusServ_chklst.ai

County of Los Angeles Community and Senior Services
Business Services Performance Measures Monthly Report

WorkSource Center, name & address:	CSS staff only – Business Services Analyst approval
Business Services Representative (BSR):	CSS staff only – Program Manager approval Da
BSR phone	Reporting period Month Year
BSR e-mail:	Date of Report:

Mail or fax the report for the preceding month no later than the 5th day of the current month to:

Geraldo Rodriguez, Program Manager
L. A. County Community and Senior Services
Business Services Marketing Division
3175 W. 6th Street, Box 6
Los Angeles, CA 90020

Fax: (213) 368-6003

Record of Businesses Visited and Services Desired

Business Name	Business Address	Contact person at business	Phone of business contact person	E-mail of business contact person	Date visited	Desired Service	Referred to

I certify that the information contained in this report is true and correct to the best of my knowledge.

Signature

Date

Name and title of person completing report