KERN COUNTY EMPLOYERS' TRAINING RESOURCE

A proud partner of America's Job Center

December 9, 2025

Board of Supervisors
Kern County Administrative Center
1115 Truxtun Avenue
Bakersfield, CA 93301

**PROPOSED RETROACTIVE AGREEMENT WITH LA COOPERATIVA CAMPESINA DE CALIFORNIA FOR A WORKFORCE INNOVATION AND OPPORTUNITY ACT RAPID RESPONSE PROGRAM**
**(Fiscal Impact: $50,000 Revenue; State Grant; Not Budgeted; Discretionary)**

Employers' Training Resource (ETR) is a partner with La Cooperativa Campesina de California (La Cooperativa), a network of agencies that provides employment and training services in California. La Cooperativa receives State grants which benefit farmworkers and ETR, as a member of La Cooperativa, receives a portion of these funds.

This Agreement is from July 1, 2025 through June 30, 2026, in the amount of $50,000, and will provide rapid response and dislocated worker activities in Kern County with a focus on dislocated agricultural industry workers. Rapid response activities are designed to implement local and regional business engagement strategies. Contract negotiations between the funding source, California Employment Development Department, and La Cooperativa have not permitted ETR to seek Board approval prior to today's meeting.

The Office of County Counsel has reviewed and approved as to form.

Therefore, IT IS RECOMMENDED that your Board approve the attached retroactive Agreement with La Cooperativa Campesina de California for a Rapid Response Program from July 1, 2025 through June 30, 2026, in an amount not to exceed $50,000, and authorize the Chairman to sign.

Sincerely,

Brandon Evans
Chief Workforce Development Officer

BE:pg
Attachment

# LA COOPERATIVA CAMPESINA DE CALIFORNIA AGREEMENT FOR SUBCONTRACTOR SERVICES WIOA RAPID RESPONSE PROGRAM

**CONTRACTOR:**
La Cooperativa Campesina de California
1107 9th Street, Suite 420
Sacramento, California 95814

**SUBCONTRACTOR:**
County of Kern
Employers' Training Resource
1600 East Belle Terrace
Bakersfield, California 93307

This grant is entered into by **La Cooperativa Campesina de California**, a private non-profit corporation, hereinafter referred to as the Contractor/Subgrantor, and the County of Kern **Employers' Training Resource**, hereinafter referred to as the Subcontractor/Subgrantee/Provider. Contractor and the Subcontractor mutually agree to the following terms and conditions:

W I T N E S S E T H:

WHEREAS:

a) La Cooperativa Campesina de California has for decades advocated and sought funds to serve farmworkers in the State of California. La Cooperativa Campesina de California, subcontracting with providers of services to farmworkers, has been the key leader in the disaster relief projects operated throughout the State in partnership with the State of California Employment Development Department (EDD).

b) CONTRACTOR has received Workforce Innovation and Opportunity Act (WIOA) Rapid Response funds from the State of California EDD to provide WIOA outreach to dislocated agricultural industry workers and link with local area Rapid Response teams.

c) SUBCONTRACTOR is prepared to operate a program designed to accomplish the objectives of the WIOA, State of California EDD, and La Cooperativa Campesina de California, and CONTRACTOR is prepared to provide Wagner-Peyser funds to SUBCONTRACTOR to enable it to operate its program.

NOW, THEREFORE, IT IS MUTUALLY AGREED between CONTRACTOR and SUBCONTRACTOR as follows:

## 1. TERM OF AGREEMENT

This Agreement shall remain in effect from **July 1, 2025,** to and including **June 30, 2026**, unless this Agreement is terminated sooner or extended further as hereinafter provided.

## 2. OBLIGATION OF FUNDS

a. FUNDING AUTHORITY: Funds are made available by the CONTRACTOR to the SUBCONTRACTOR under the authority granted in Contract AA511094 with the State of California EDD.

b. TOTAL FUNDS: Total funds obligated by the CONTRACTOR for this Agreement will not exceed **$50,000**.

## 3. REFERENCE TO ATTACHMENTS

The Subcontractor hereby agrees to operate the project and expend funds only in accordance with the enclosed:

Exhibit A - General Provisions
Exhibit B - Confidentiality Statement
Exhibit C - Statement of Work and Plan
Exhibit D - Budget Summary Plan
Exhibit E - Reporting Requirements
Exhibit F - Method of Payment

## 4. BINDING EFFECT OF AGREEMENT

This Agreement shall not be binding or of any force until it has been fully and properly signed by all the parties thereto. Nothing in this Agreement shall be binding upon the parties in any agreement that may be entered into the future.

APPROVED AND RECOMMENDED AS TO CONTENT

Brandon J. Evans
Chief Workforce Development Officer

COUNTY OF KERN

Chair, Board of Supervisors

APPROVED AS TO FORM
Office of County Counsel

Chief Deputy

LA COOPERATIVA CAMPESINA DE CALIFORNIA

Marco C. Lizarraga
Executive Director

Contract No. **WIOA-RR-2025-26-ETR**

Modification No. 00

**WORKFORCE INNOVATION & OPPORTUNITY ACT**
**SERVICE PROVIDER CONTRACT**

1. **PARTIES.** This contract is between **Employers' Training Resource** hereinafter referred to as the "Provider" or "Subgrantee" and La Cooperativa Campesina de California, hereinafter referred to as the "La Cooperativa" or "Subgrantor".

2. **EXHIBITS.** This contract consists of this page and the Exhibits listed below. Terms of Exhibits are as designated on each Exhibit.
   - Exhibit A - General Provisions
   - Exhibit B – Confidentiality Statement
   - Exhibit C - Statement of Work
   - Exhibit D - Budget Summary Plan
   - Exhibit E - Reporting Requirements
   - Exhibit F – Method of Payment

3. **TERM.** This contract begins on **July 1, 2025** and ends on **June 30, 2026**, except when necessary and reasonable start-up or closeout activities are authorized elsewhere in this contract or by La Cooperativa.

4. **FUND LEVELS.** Payments to the Provider by La Cooperativa may not exceed the amounts listed below for each separate program. These amounts may only be increased or shifted through a written, signed contract modification.

| Programs | Funding Level |
|---|---|
| **Rapid Response Program**<br>Fed Catlg. 17.278 | **$ 50,000** |
| | |
| | |
| **Total** | **$ 50,000** |

5. **METHOD OF PAYMENT.** Subgrantee will be reimbursed for their expenditures once a month provided that all terms and conditions in Exhibit "F" have been fully satisfied.

6. **PURPOSE.** To implement the Rapid Response Program contract.

7. **SIGNATURES.** This contract may only be modified by a signed, written contract modification document. No oral conversation shall be considered to be contract modification. The parties agree to all contract provisions, including this page and all exhibits, by signing below.

**FOR LA COOPERATIVA**

10/27/25

Signature Date

Marco Lizarraga, Executive Director

**FOR THE PROVIDER**

11/7/25

Signature Date

Brandon J. Evans, Chief Workforce Development Officer

# GENERAL PROVISIONS

This contract contains the entire agreement of the parties and supersedes all negotiations, verbal or otherwise and any other agreement between the parties hereto. This contract is not intended to and will not be construed to create the relationship of agent, servant, employee, partnership, joint venture or association between the La Cooperativa Campesina de California and the Contractor. Contractor represents and warrants it is free to enter into and fully perform this contract.

## A. WIOA Compliance

In performance of this contract, Contractor will fully comply with:

1. The provisions of the Workforce Innovation Opportunity Act (WIOA) and all regulations, legislation, directives, policies, procedures and amendments issued pursuant thereto.

2. All State legislation and regulations to the extent permitted by federal law and all policies, directives and/or procedures, which implement the WIOA.

3. Contractor will ensure diligence in managing programs under this contract, including performing appropriate monitoring activities and taking prompt corrective action against known violations of the WIOA. Contractor agrees to conform to the provisions of the WIOA and the contract requirements as referenced in Uniform Guidance 2 CFR Part 200, Appendix II and DOL Exceptions 2 CFR part 2900, Appendix II to Part 200.

4. Title VI of the Civil Rights Act of 1964, and the Rules and Regulations promulgated there under and the provisions of WIOA, Section 188.

   As a condition to the award of financial assistance, the Contractor assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

   - Section 188 of the WIOA, which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliations or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I – financially assisted program or activity;

   - Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color and national origin;

   - Section 504 of the Rehabilitation Act of 1973; as amended, which prohibits discrimination against qualified individuals with disabilities;

- The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in education programs.

The Contractor also assures that it will comply with Uniform Guidance 2 CFR Part 200, DOL Exceptions 2 CFR Part 2900 and all other regulations implementing the laws listed above. This assurance applies to the Contractor's operations of the WIOA Title I – financial assisted program or activity, and to all agreements that Contractor makes to carry out the WIOA Title I – financially assisted program or activity. The Contractor understands that the United States has the right to see judicial enforcement of this assurance.

- This Contractor shall include the nondiscrimination and compliance provisions of this clause in all subcontracts to perform work under the contract.

- This Contractor agrees to conform to nondiscrimination provisions of the WIOA and other federal nondiscrimination requirements referenced in WIOA Sec. 188.

5. In compliance with Public Law 109-234, none of the funds appropriated in Public Law 109-149 or prior Acts under the heading "Employment and Training" that are available for expenditure on or after June 15, 2006, shall be used by a recipient or subrecipient of such funds to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II, except as provided for under section 101 of Public Law 109-149. This limitation shall not apply to vendors providing goods and services as defined in Uniform Guidance 2 CFR Part 200 and the DOL Exceptions 2 CFR Part 2900. Where States are recipients of such funds, States may establish a lower limit for salaries and bonuses of those receiving salaries and bonuses from subrecipients of such funds, taking into account factors including the relative cost-of-living in the States, the compensation levels from programs involved including Employment and Training Administration programs.

   The incurrence of costs and receiving reimbursement for these costs under this award certifies that your organization has read the above special condition and is in compliance.

6. Contractor will establish and maintain a grievance and complaint procedure in compliance with the WIOA, federal regulations and state statutes, regulations and policy.

B. <u>Certifications/Assurances</u>

Except as otherwise indicated, the following certifications apply to all Contractors.

1. Americans with Disabilities Act: The Contractor agrees to comply with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to ADA. (42 USC12101 et seq.)

2. Drug-Free Workplace Certification: By signing this contract the Contractor hereby certifies under penalty of perjury under the laws of the State of California that the Contractor will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

    a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.

    b. Establish a Drug-Free Awareness Program as required to inform employees about:

        - the dangers of drug abuse in the workplace;
        - the person's or organization's policy of maintaining a drug-free workplace;
        - any available counseling, rehabilitation and employee assistance programs; and,
        - penalties that may be imposed upon employees for drug abuse violations.

    c. Every employee who works on this contract will:

        - receive a copy of the company's drug-free policy statement; and,
        - agree to abide by the terms of the company's statement as a condition of employment on the contract.

3. Debarment and Suspension Certification: By signing this contract, the Contractor hereby certifies under penalty of perjury under the laws of the State of California that the Contractor will comply with regulations implementing Executive Order 12549, Debarment and Suspension, Uniform Guidance 2 CFR Part 200, Appendix I, that to the best of its knowledge and belief, that it and its principals:

    a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transitions by any federal department or agency.

    b. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes, or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property.

c. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state or local) with commission of any of the offenses enumerated in Section 2 of this certification.

d. Have not within a three year period preceding this contract had one or more public transactions (federal, state or local) terminated for cause or default.

Where the Contractor is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this agreement.

4. Lobbying Restrictions: By signing this contract the Contractor hereby assures and certifies to the lobbying restrictions which are codified in the DOL regulations at Uniform Guidance 2 CFR 200 and DOL Exceptions 2 CFR 2900.

   a. No federal appropriated funds have been paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress, in connection with this federal contract, grant loan, or cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

   b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress, in connection with this Contract, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying" in accordance with its instructions.

   c. The undersigned shall require that the language of the lobbying restrictions be included in the award documents for contract transactions over $100,000 (per OMB) at all tiers (including contracts, contracts and subcontracts, under grants, loan, or cooperative agreements), and that all subrecipients shall certify and disclose accordingly.

   d. This certification is a material representation of fact upon which reliance is placed when this transaction is executed. Submission of the Lobbying Certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, and U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each failure.

C. General Provisions

1. Unenforceable Provision

In the event that any provision of this contract is unenforceable or held to be unenforceable, then the parties agree that all other provisions of this contract have force and effect and shall not be affected hereby.

2. Equal Employment Opportunity

Contractor shall comply in accordance with Title VI of the Civil Rights Act of 1964 and compliance with Equal Employment Opportunity provision in Executive Order (E.O.) 11246, as amended by E.O. 11375 and supplemented by the requirements of 41 CFR Part 60.

3. Indemnification

The following provision applies only if the Contractor is a governmental entity:

a. Pursuant to the provision of Section 895.4 of the California Government Code, each party agrees to indemnify and hold the other party harmless from all liability for damage to persons or property arising out of or resulting from acts or omissions of the indemnifying party.

b. The following provision applies only if the Contractor is a non-governmental entity: The Contractor agrees to the extent permitted by law, to indemnify, defend and save harmless the La Cooperativa Campesina de California, its officers, agents and employees from any and all claims and losses accruing or resulting to any and all contractors, subcontractors, materials persons, laborers and any other persons, firms or corporations, furnishing or supplying work, services, materials, or supplies in connection with the performance of this agreement, and from any and all claims and losses accruing or resulting to any persons, firms or corporations which may be injured or damaged by the Contractor in the performance of this contract.

Failure to comply with all requirements of the certifications in Section 2 may result in suspension of payment under this contract or termination of this contract or both, and the Contractor may be ineligible for award of future state contracts/contracts if the department determines that any of the following has occurred: (1) false information on the certifications, or (2) violation of the terms of the certifications by failing to carry out the requirements as noted above.

4. Clean Air and Water Act

For contracts in excess of $100,000, compliance with all applicable standards, orders, or requirements issued under Section 306 of the Clean Air Act (42 USC 1857 {h}); Section 508 of the Clean Water Act (33 USC 1368), Executive Order 11738, and the U.S. Environmental Protection Agency regulations (40 CFR 15, revised as of July 1, 1989)

For contracts in excess of $100,000, compliance with all applicable standards, order or regulations issued pursuant to the Clean Air Act (42 USC Sec. 7401 et seq.) and the Federal Water Pollution Control Act as amended (33 USC Sec. 1251 et seq.). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

5. Standards of Conduct

The following standards apply to all Contractors.

a. General Assurance: Every reasonable course of action will be taken by the Contractor in order to maintain the integrity of this expenditure of public funds and to avoid favoritism and questionable or improper conduct. This contract will be administered in an impartial manner, free from efforts to gain personal, financial or political gain.

b. Avoidance of Conflict of Economic Interest: An executive or employee of the Contractor, an elected official in the area or a member of the Local Board, will not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by the Contractor or La Cooperativa Campesina de California. Supplies, materials, equipment or services purchased with contract funds will be used solely for purposes allowed under this contract. No member of the Local Board will cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide direct financial benefit to that member (or immediate family of the member) or any business or organization which the member directly represents.

6. Subcontracting

a. Any of the work or services specified in this contract which will be performed by other than the Contractor will be evidenced by a written agreement specifying the terms and conditions of such performance.

b. The Contractor will maintain and adhere to an appropriate system, consistent with federal, state and local law, for the award and monitoring of contracts which contain acceptable standards for insuring accountability.

c. The system for awarding contracts will contain safeguards to insure that the Contractor does not contract with any entity whose officers have been convicted of fraud or misappropriation of funds within the last two years.

7. Insurance

Except for city and county governmental entities, Contractors must provide the La Cooperativa

Campesina de California evidence of the coverage specified in a, b, c and d below. The evidence of coverage shall include the registration number of the contract for identification purposes.

a. Contractor will ensure adequate bonding and insurance in an amount of not less than the contract award prior to the receipt of funds under this contract. If the bond is canceled or reduced, Contractor will immediately so notify the La Cooperativa Campesina de California. In the event the bond is canceled or revised, the La Cooperativa Campesina de California will make no further disbursements until it is assured that adequate coverage has been obtained.

b. Contractor will provide general liability insurance with a combined limit of $1,000,000 or public liability and property damage coverage with a combined limit of not less than $1,000,000.

c. Contractor will provide broad form automobile liability coverage with limits as set forth in (b) above, which applies to both owned/leased and non-owned automobiles used by the Contractor or its agents in performance of this contract, or, in the event that the Contractor will not utilize owned/leased automobiles but intends to require employees, trainees or other agents to utilize their own automobiles in performance of this contract, Contractor will secure and maintain on file from all such employees, trainees or agents a self-certification of automobile insurance coverage.

d. Contractor will provide Worker's Compensation Insurance, which complies with provisions of the California Labor Code, covering all employees of the Contractor. Medical and Accident Insurance will be carried for those participants not qualifying as "employee" (Section 3350, et seq. of the California Labor Code) for Worker's Compensation.

La Cooperativa Campesina de California will be named as "Certificate Holder" of policies secured in compliance with paragraphs a-d above and will be provided certificates of insurance or insurance company "binders" prior to any disbursement of funds under this contract, verifying the insurance requirements have been complied with. The coverage noted in b. and c. above must contain the following clauses:

1) Insurance coverage will not be canceled or changed unless 30 days prior to the effective date of cancellation or change written notice is sent by the Contractor to:

   La Cooperativa Campesina de California<br>
   1107 9th Street. Suite 420<br>
   Sacramento, CA 95814

2) La Cooperativa Campesina de California, its officers, agents, employees and servants are included as additional insured, but only insofar as the operations under this contract are concerned.

3) La Cooperativa Campesina de California is not responsible for payment of premiums or assessments on this policy.

8. Funding

It is mutually understood between the parties that this contract may have been written before ascertaining the availability of congressional and legislative appropriation of funds, for the mutual benefit of both parties, in order to avoid program and fiscal delays which would occur if the contract was executed after that determination was made.

This contract is valid and enforceable only if (1) sufficient funds are made available by the State Budget Act of the appropriate state fiscal years covered by this contract for the purposes of this program and (2) sufficient funds are made available to the state by the United States Government for the fiscal years covered by this contract for the purposes of this program. In addition, this contract is subject to any additional restrictions, limitations, or conditions enacted by the Congress and Legislature or any statue enacted by the Congress and Legislature which may affect the provisions, terms, or funding of this contract in any manner.

The La Cooperativa Campesina de California retains the right to suspend financial assistance, in whole or in part, to protect the integrity of the funds or to ensure proper operation and performance of the program, providing the Contractor is given prompt notice. Failure on the part of the Contractor or a Subcontractor of the Contractor to comply with the provisions of this contract, or with the WIOA or regulations, when such failure involves fraud or misappropriation of funds, may result in immediate withholding of funds.

9. Accounting and Cash Management

a. Contractor will comply with controls, record keeping and fund accounting procedure requirements of WIOA, federal and state regulations and directives to ensure the proper disbursal of, and accounting for, program funds paid to the Contractor and disbursed by the Contractor, under this contract.

b. Income (including interest income) generated as a result of the receipt of WIOA activities, will be utilized in accordance with policy and procedures established by the La Cooperativa Campesina de California. Contractor will account for any such generated income separately.

10. Amendments

This contract may be unilaterally modified by the La Cooperativa Campesina de California under the following circumstances:

a. There is an increase or decrease in federal or state funding levels.

b. A modification to the Contract is required in order to implement an adjustment to a Contractor's plan.

c. Funds awarded to the Contractor have not been expended in accordance with the schedule included in the approved Contractor's plan. After consultation with the Contractor, the La Cooperativa Campesina de California has determined that funds will not be spent in a timely manner, and such funds are for that reason to the extent permitted by and in a manner consistent with state and federal law, regulations and policies, reverting to the La Cooperativa Campesina de California.

d. There is a change in state and federal law or regulation requiring a change in the provisions of this contract.

e. An amendment is required to change the Contractor's name as listed on this contract. Upon receipt of legal documentation of the name change the state will process the amendment. Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.

Except as provided above, this contract may be amended only in writing by the mutual agreement of both parties.

11. Reporting

Contractor will compile and submit reports of activities, expenditures, status of cash and closeout information by the specified dates as prescribed by the La Cooperativa Campesina de California. All expenditure reports must be submitted upon the accrual basis of accounting. Failure to adhere to the reporting requirements of this agreement will result in funds not being released.

12. Termination

This contract may be terminated in whole or in part for either of the two following circumstances:

a. Termination for Convenience - Either the La Cooperativa Campesina de California or the Contractor may request a termination, in whole or in part, for convenience. The Contractor will give a ninety (90) calendar-day advance notice in writing to the La Cooperativa Campesina de California. The La Cooperativa Campesina de California will give a ninety (90) calendar-day advance notice in writing to the Contractor.

b. Termination for Cause - The La Cooperativa Campesina de California may terminate this contract in whole or in part when it has determined that the Contractor has substantially violated a specific provision of the WIOA regulations or implementing state legislation and corrective action has not been taken.

All notices of termination must be in writing and be delivered personally or by deposit in the U. S. Mail, postage prepaid, "Certified Mail-Return Receipt Requested", and will be deemed to have been given at the time of personal delivery or of the date of postmark by the U. S. Postal Service.

Notices to the La Cooperativa Campesina de California will be addressed to:

Marco Lizarraga, Executive Director
La Cooperativa
1107 9th Street, Suite 420
Sacramento, CA 95814

13. Records

a. If participants are served under this contract, the Contractor will establish a participant data system as prescribed by the La Cooperativa Campesina de California.

b. Contractor will retain all records pertinent to this contract for a period of three years from the date of final payment of this contract. If, at the end of three years, there is litigation or an audit involving those records, the Contractor will retain the records until the resolution of such litigation or audit.

c. The La Cooperativa Campesina de California and/or the State of California, the Federal funding source, or their designee will have access to and right to examine, monitor and audit all records, documents, conditions and activities related to programs funded by this contract. For purposes of this section, "access to" means that the Contractor shall at all times maintain within the State of California a complete set of records and documents related to programs funded by this agreement. The Contractor shall comply with this requirement regardless of whether it ceases to operate or maintain a presence within the State of California before the expiration of the Contract. Contractor's performance under the terms and conditions herein specified will be subject to an evaluation by the La Cooperativa Campesina de California of the adequacy of the services performed, timeliness of response and a general impression of the competency of the firm and its staff.

14. Audits

a. The Contractor will maintain and make available to auditors, at all levels, accounting and program records including supporting source documentation and cooperate with all auditors. All governmental and non-profit organizations must follow the audit requirements (single audit or program-specific audit requirement) of Uniform Guidance 2 CFR Part 200 and DOL Exceptions 2 CFR Part 2900.

b. The Contractor and/or auditors performing monitoring or audits of the Contractor or its subcontracting service providers will immediately report to the La Cooperativa Campesina de California any incidents of fraud, abuse or other criminal activity in relation to this contract.

15. Disallowed Costs

Except to the extent that the State determines it will assume liability, the Contractor will be liable for and will repay, to the La Cooperativa Campesina de California, any amounts expended under this contract found not to be in accordance with WIOA including, but not limited to, disallowed costs. Such repayment will be from funds (Non-Federal).

16. Conflicts

a. Contractor will cooperate in the resolution of any conflict with its federal funding source that may occur from the activities funded under this agreement.

b. In the event of a dispute between the La Cooperativa Campesina de California and the Contractor over any part of this contract, the dispute may be submitted to non-binding arbitration upon the consent of both the La Cooperativa Campesina de California and the Contractor. An election for arbitration pursuant to this provision will not preclude either party from pursuing any remedy for relief otherwise available.

17. Property

All property, whether finished or unfinished documents, data, studies and reports prepared or purchased by the Contractor under this contract, will be disposed of in accordance with the direction of the La Cooperativa Campesina de California. In addition, any tools and/or equipment furnished to the Contractor by the La Cooperativa Campesina de California and/or purchased by the Contractor with funds pursuant to this contract will be limited to use within the activities outlined in this contract and will remain the property of the United States Government and/or the La Cooperativa Campesina de California. Upon termination of this contract, Contractor will immediately return such tools and/or equipment to the La Cooperativa Campesina de California or dispose of them in accordance with the direction of the La Cooperativa Campesina de California.

**EXHIBIT B**

# CONFIDENTIALITY STATEMENT

I understand that while performing my official duties I may have access to confidential information. Confidential information identifies an individual or an employing unit. Confidential information is not open to the public. Special precautions are necessary to protect it from unauthorized access, use, modification, disclosure, and destruction.

**<u>I agree to protect confidential information by:</u>**
Accessing and using the confidential information only for the purpose of performing my official duties

Never accessing or using confidential information out of curiosity or for personal reasons

Never showing or discussing confidential information to or with anyone who does not have the need to know

Storing confidential information in a place physically secure form access by unauthorized persons

Returning all confidential information after use and destroying all copies or derivations of the confidential information when its use ends utilizing an approved method of destruction which includes shredding, burning, or certified or witnessed destruction. Never disposing of such information in the wastebasket or recycle bins.

**<u>Penalties:</u>**
I understand that unauthorized access, use, modification, disclosure, or destruction of confidential information is strictly prohibited by state and federal laws, including but not limited to California Penal Code 502, California civil code Section 1798.53 or 1798.55 (for state and local governmental agencies), and the California Unemployment Insurance Code Section 2111. The penalties for unauthorized access, use, modification, disclosure, or destruction may include disciplinary action and/or criminal or civil action.

***"I certify that I have read and understand the confidentiality statement provided above"***

| | |
|---|---|
| Brandon J. Evans | |
| Print Full Name | Signature |
| Employers' Training Resource | 11/7/25 |
| Agency/Department | Date Signed |

# LA COOPERATIVA RAPID RESPONSE PROJECT
# STATEMENT OF WORK AND PLAN

## FRAMEWORK

La Cooperativa's Member Action Plan for rapid response and dislocated worker activities in 2025 - 2026 will be consistent with the revised State WIOA State Unified Strategic Workforce Development Plan 2016-2020 and goals of:

- Integrating individuals from target populations into broader workforce efforts – specifically California farmworker and agricultural industry population;
- Ensuring the use of customer centered design at the local level of program operations;
- Leveraging the 40 years of La Cooperativa and its members' experience in serving this target population, as well as funding (such as WIOA 167 and CSBG).

The integration of this focused rapid response and dislocated worker funding into broader local and regional area workforce development efforts will help avoid the creation of workforce "silos" that partition and segregate target populations from broader workforce, education and training efforts. La Cooperativa's goal is that the members will be a significant partner in both local/regional rapid response and dislocated worker activities.

Member rapid response activities will focus on dislocated agricultural industry workers and be consistent with EDD Directive ***Rapid Response and Layoff Aversion Activities July 22, 2016 Number: WSD 16-04*** (Attached).

**Member Service Area**

**Local rapid response areas Identified by Member**

- ETR's LWIB Focus:
    - Kern County

**Objectives**

1. La Cooperativa and their members will collaborate with Local Boards and AJCCs to improve methods of exchanging MSFW dislocation information, increase the number of MSFWs participating in labor exchange activities and provide guidance and/or financial assistance to establish community transition teams to assist an impacted community in organizing support for dislocated workers and in meeting the basic needs of their families that are beyond the resources and ability of the One-Stop delivery system to provide.

    a. This objective meets the requirements under 20 CFR 682.330(c) and 20 CFR 682.340(b).
    b. This objective will be supported by NFJP funding and other leveraged funding that La Cooperativa members have at their disposal as determined appropriate and allowable by the respective fund source.

2. La Cooperativa will expand and improve rapid response processes and strategies for reaching MSFWs and businesses in transition to ensure a coordinated response to a dislocation event.
    a. This objective meets the requirements under 20 CFR 682.330(b) and (d)-(e).
    b. This objective will be supported by NFJP funding and other leveraged funding that La Cooperativa has at its disposal as determined appropriate and allowable by the respective fund source.

3. Develop systems and processes to gather and analyze data on the MSFW population to gain a more comprehensive understanding of the agricultural community and the needs of MSFWs.

    a. This objective meets the requirements under 20 CFR 682.330(g)(1).
    b. This objective will be supported by NFJP funding and other leveraged funding that La Cooperativa has at its disposal as determined appropriate and allowable by the respective fund source.

4. Provide assistance and build relationships with employers to prevent or minimize the duration of unemployment resulting from layoffs.

    a. This objective meets the requirements under 20 CFR 682.320(a).
    b. This objective will be supported by NFJP funding and other leveraged funding that La Cooperativa has at its disposal as determined appropriate and allowable by the respective fund source.

## I. Rapid Response Activities

**A. Worker and Employer Outreach**: Many of the dislocations that occur in this industry are not announced events. Therefore, La Cooperativa members will use their unique community-based outreach system to reach MSFWs that are facing layoffs. This specialized network provides the ability to outreach to diverse and hard-to-reach populations through multiple access points and leverage regional partnerships to maximize the effect of the program. With Rapid Response funding La Cooperativa member Employers' Training Resource will conduct outreach to dislocated agricultural industry workers and link with Local Area Rapid Response Teams.

- The Rapid Response support will provide essential outreach to the farmworker and agricultural employer community.
- The information gained from this outreach system will be coordinated with the local Rapid Response teams to assist with access to Unemployment Compensation and determine if resources available through the one-stop system can be utilized. La Cooperativa members will leverage their NFJP WIOA funds to deliver other necessary services needed to transition the dislocated worker to re-employment. This enhanced coordination with the workforce development system will enable dislocated MSFWs to return to work as quickly as possible, access training and career services and minimize periods of unemployment.
- Layoff aversions strategies and activities to prevent or minimize the duration of unemployment resulting from layoffs.
- La Cooperativa member staff conduct monthly calls and visits to agriculture employers in their area providing information on the services available and gathering information on any planned layoffs. They have also established employer participation through industry advisory boards, committees and focus groups. This type of business engagement at the local level can help prevent or minimize the duration of unemployment for laid off workers.
- When La Cooperativa members receive notice that a major layoff or closure will occur, they will collaborative with the AJCCs to develop a specific layoff aversion strategy if applicable. When possible, connect companies to short-time compensation programs such as the EDD's Unemployment Insurance "work sharing" program designed to prevent layoffs and employer loan programs for employee skill upgrading or other federal, state and local resources as necessary to address other business needs that cannot be funded with other resources provided. La Cooperativa members have established relationships with hundreds of employers in their area. They will use a multipronged approach to continue building employer alliances that include layoff aversion strategies
- As part of its Rapid Response work, the Member will submit either **121** (Exhibit E - **Attachment 2 - Rapid Response**) and/or **122** (Exhibit E - **Attachment 4 - Layoff Aversion**) activities into CalJOBS, or provide other data to augment the LWIB reports.

**B. Enrollment in and Referral to other programs and resources**

- Outreach activities could result in an enrollment in the main Dislocated Worker Grant and referrals to other programs (See below) including access to support services.
- We expect as much as a 10-1 drop off between Rapid Response or outreach contacts and an individualized or training enrollment in WIOA.
    - Members will estimate the client flow and numbers between Rapid Response and enrollment in the Dislocated Agricultural Worker Program. Generally, we would look at about a 10-1 ratio – for every 100 contacts at the Rapid Response level we might get 10 enrollments for the Dislocated Agricultural Worker Program. Members will use the first year of

operations to track the ratio and establish a metric for the ratio between rapid response contacts and enrollments in individualized career services.

**C. Rapid Response Activities**

- The member Rapid Response activities will assist dislocated agricultural industry workers with a focus on the following activities:
  - Orientation meetings with farmworkers and agricultural employers
  - Registration of participants
  - Providing information about services available through Rapid Response, Dislocated worker and WIOA NFJP 167 training and temporary housing, including industry specific opportunities
  - Coordination with EDD's MSFW Outreach Program.
  - Resource referral activities, including UI, food, shelter, clothing and other assistance for low income farmworkers.
  - Job Search activities
  - Full exposure to services available through WIOA 167, Dislocated Worker, NEG activities including California Drought and Valley Fire activities, and local LWIA resources including the youth and adult programs.
  - Providing information about available employment and training activities and services available in the AJCCs and setting up systems, i.e., business processes and/or individual referral and information sharing mechanisms, to provide access to information and services including unemployment compensation (developing and distributing outreach materials).
  - Conduct immediate and on-site contact with employers and representatives of the affected workers when possible, partner with Local Boards to ensure a coordinated response to the dislocation, and deliver other necessary services and resources to support reemployment for affected workers.
  - As layoff information becomes available, La Cooperativa members will coordinate with the AJCC's rapid response team to plan meetings with employers, conduct orientation sessions and determine the assistance needs of the workers. These co-rapid response teams will also collaborate on presenting workshops and job fairs. Monthly meetings with the AJCC partners are conducted to plan ahead for potential layoff events and discuss ways to implement new strategies for improving services. With the benefit of La Cooperativa's bi-lingual staff, one of the most requested services is assisting AJCCs with translation assistance in communicating with farmworkers.
  - As appropriate, develop systems and processes for identifying, gathering, analyzing and tracking layoff information.
    - This rapid response project targets a large geographic area of the State and specifically focuses on the Agriculture Industry. Layoffs occurring in the industry are difficult to track and are largely unknown to the mainstream workforce system. La Cooperativa plans to collect and analyze statewide MSFW dislocation information and collaborate with EDD to provide a more comprehensive understanding of the agricultural community and the needs of MSFWs. This data will be shared state-wide to assist with building new strategies to improve rapid response services to this population.

    - This information will be gathered and shared throughout the La Cooperativa service delivery network, i.e., all of is local and state-level partners including the AJCCs and local areas.
  - For complete list of required and allowable activities see **Attachment 1**.

## II. Rapid Response Action Plans

Employers' Training Resource will develop a **Rapid Response Action Plan** to guide activities in their service area, including

- Identify local team member to coordinate with Local Area (LWIA) dislocated worker activities
- A focus on transition from Rapid Response to individualized career services and referrals to needed services
- Updating local MOU's to reflect both Rapid Response and Dislocated Worker activities including One Stop cost sharing
- Further defining Co-enrollment protocols
- Ensuring that the needs of farmworkers in are reflected in local plans
- Working with local areas to include farmworkers as an important element in local Program Priority of Service (Consistent with WSD15-14).

### Identify a Team Member

Member will **identify a local Team Member** responsible for both Rapid Response and Dislocated worker activities (By local we mean congruent with the LWIA operational area). The staff will link with local rapid response and dislocated worker programs, attend meetings, receive and send communications etc.

### Individualized Career Services

Members will link rapid response and THEIR dislocated worker activities focusing on individualized career services (the former WIA intensive and training services). The expectation is that 100% of enrollees will received these services.

### Integrating Rapid Response with MOU's

La Cooperativa member ETR is a valued partner in local LWIB and the American Job Centers of California Operations, and have WIOA MOU's in place with each of these LWIB's. The initial MOU concern has been to link the WIOA 167 funding to LWIB operations, but ETR will negotiate and fully describe the integration of our Rapid Response and Dislocated Agricultural Worker Program funding into the existing local MOU's. All La Cooperativa members have established memorandums of understanding (MOU's) or cooperative agreements with the AJCC for cross referral, co-enrollment, joint job development and outreach. Members participate in monthly meetings with the AJCC staff to discuss cross-training, job development and shared technology development efforts.

Although subject to local negotiation, critical elements of this MOU include:

  - For co-enrolled clients, joint assessment would be done where appropriate.

- Ideally the MOU will reflect revised and negotiated performance standards appropriate to the population being served.
- The MOU should outline access and co-enrollment protocols with the goal of improving the access of LEP clients as well as those clients with less than a High school degree.
- Within the MOU framework member will focus on achieving the goals determined and set by the local implementation of the priority of service.
- Navigators or enhanced case management to assist LEP and hard to serve clients when appropriate and needed.
- Co-enrollment opportunities include (examples):
  - WIOA NFJP 167 + LWIB Dislocated
  - NEG + LWIB Dislocated
  - La Cooperativa Dislocated Agricultural Worker Program+ LWIB Adult or Youth

**Co-Enrollment**

ETR will work to improve protocols and reporting for the co-enrollment of clients to allow for joint work and joint credit. Improved co-enrollment protocols are especially important because LEP, farmworkers and other hard to service clients need longer and more intensive training

**Local Plans and Priority of Service**

- La Cooperativa members will build on existing relationships and act as liaisons between the farmworker population and the Local Boards to strengthen the exchange of MSFW dislocation information. La Cooperativa members have long established working relationships and collaboration with the AJCCs and EDD's significant MSFW offices in each of their regions. As grant recipients of the NFJP, La Cooperativa members are mandatory partners in the one stop centers. ETR will work with the LWIAs to ensure that the needs of migrant and seasonal farmworkers are adequately described in the local plan elements as these elements are updated within the context of the DOL approved state plan; especially:
  - To ensure full inclusion of the needs of agricultural industry workers in the local plan and the priority of service protocols.
  - All LWIB WIOA partners can assist with meeting those needs and develop a menu of best practices and model partnerships (including co-enrollment protocols), especially focusing on areas where the State plan has identified opportunities and current weaknesses, including low levels of service to LEP clients and clients with less than a High school degree.
  - Set targets for both service and co-enrollment based on this planning process.
  - The planning process will include development of cost sharing agreements for American Job Centers' infrastructure (as required by the December 2017 deadline).

**Reporting -- WIPS Data Elements**

- Member will report on all required WIOA WIPS required data elements with respect to individuals enrolled and co-enrolled as well as implement a customer satisfaction survey to help assess the post program success of participants.

**Attachments:**

- EDD Directive ***Rapid Response and Layoff Aversion Activities July 22, 2016 Number: WSD 16-04*** (Attached)
    - List of required and allowable Rapid Response Activities.
    - Rapid Response 121 Report and instructions
    - Rapid Response 122 Report and instructions

**Additional Activities**

Rapid Response subgrantees must also complete the following activities:

1. Utilize CalJOBS℠ to enter Rapid Response activities:

   a. Activity code E32 – Rapid Response (layoff or closure)
   b. Activity code E54 – Layoff Aversion
   c. Activity code E56 – Other Referral (referral to Local Workforce Area for services)
   d. Activity code E64 – Small Business Downsizing/Closure Assistance
2. Submit quarterly narrative reports to the La Cooperativa by the designated due date.
3. Act as a liaison for the targeted population to assist Local Boards in building relationships with businesses and job seeker communities to enhance communication between them.
4. Participate in Local Board meetings to keep them informed about current activities by sharing challenges, barriers, successes, and lessons learned.
5. Participate in at least one Rapid Response roundtable meeting for your region. Provide information or a presentation on the activities that your agency delivers.

# PROJECT BENCHMARKS AND PERFORMANCE STANDARDS

| METRICS FOR RAPID RESPONSE AND DISLOCATED WORKER | |
|---|---|
| **Rapid Response Activities Outreach** | ETR |
| | 11.2% |
| OUTREACH GOAL | 538 |
| Unemployed and Underemployed Agricultural Industry Workers | 511 |
| Immigrants | 403 |
| Hispanic/Latino | 511 |
| Limited in English (LEP) | 269 |
| High School Degree or less | 134 |
| Initial assessment of need and eligibility for services | 430 |
| *Rapid Response Referrals to Programs/Services* | |
| Emergency Support Services -- CSD DEAP Program | 108 |
| Referrals for other assistance, e.g. UI, immigration assistance, affordable housing, child care, Cal Fresh/food stamps, ACA enrollment, health care access. | 81 |
| Referrals to Dislocated Worker Training | 54 |
| *Dislocated Worker Enrollments* | |
| Dislocated Worker -- Individualized Career Services and Training | 54 |
| Hispanic/Latino | 51 |
| Immigrants | 40 |
| Agricultural industry workers | 54 |
| Limited in English (LEP) | 13 |
| Basic Skill Defcient | 27 |
| Less than High School Degree | 11 |
| Low Income | 22 |
| Co-enrolled with WIOA 167 | 11 |
| DACA and./or DACA eligible | 5 |
| Co-enrolled with Local/Regional WIOA Programs | 5 |
| Client characteristics of enrollee meet one or more local priority of service goals | 27 |
| Wage Gain | $7,000 |

Employment Development Department
State of California
Workforce Services

# DIRECTIVE

**Date:** July 22, 2016 **Number:** WSD16-04

CALIFORNIA Workforce Development Board

# RAPID RESPONSE AND LAYOFF AVERSION ACTIVITIES

## EXECUTIVE SUMMARY

This policy consolidates previous *Workforce Investment Act* (WIA) Rapid Response guidance into a single comprehensive directive, and distinguishes Rapid Response activities from Additional Assistance. It provides the California Workforce Development Board's (State Board) policy framework for Local Workforce Development Boards (Local Board) to design and implement a local/regional business engagement strategy and articulates the role of layoff aversion within effective Rapid Response systems.

It does not make any changes to the current formula allocation methods for Rapid Response funds. It also provides direction and guidance for conducting layoff aversion activities as required by the federal *Workforce Innovation and Opportunity Act* (WIOA).

This policy applies to all recipients of WIOA 25 Percent Dislocated Worker funds, and is effective upon release.

This policy contains only state-imposed requirements.

This directive finalizes Workforce Services Draft Directive WSDD-142, issued for comment on May 6, 2016. The State Board received 12 comments. The comments did not result in any changes to the directive. A summary of the comments is provided as Attachment 6.

This directive supersedes Workforce Services Directive WSD14-03, dated September 3, 2014. Retain this directive until further notice.

## REFERENCES

- WIOA (Public Law 113-128) Sections 3(15) and (51), 107(d)(4), and 134(a)(2)(A)
- Title 20 *Code of Federal Regulations* (CFR) WIOA Notice of Proposed Rule Making (NPRM) Section 682.300-340
- Training and Employment Guidance Letter (TEGL) 03-15, Subject: *Operating Guidance for WIOA* (July 1, 2015)

- Training and Employment Notice (TEN) 09-12, Subject: *Layoff Aversion in Rapid Response Systems* (August 31, 2012)
- TEN 31-11, Subject: *The Rapid Response Framework* (March 1, 2012)
- TEN 32-11,Subject: *Rapid Response Self-Assessment* Tool (March 1, 2012)
- TEN 03-10, Subject: *The National Rapid Response Initiative* (August 9, 2010)
- California Labor Code Sections 1400-1408
- California's Strategic Workforce Development Plan: 2013-2017, *Shared Strategy for a Shared Prosperity*
- Workforce Services Directive WSD15-23 Subject: *Transfer of Funds – WIOA Adult/Dislocated Worker Programs* (March 29, 2016)
- WSD15-19 Subject: *Revised Amendment to PY 2015-16 RR Allocations and Guidance on Use of these Funds for WIOA Transition Activities* (March 14, 2016)
- WSD13-1 Subject: *Authorization to Work Verification Requirements* (July 2, 2013)
- WSD12-3 Subject: *Quarterly and Monthly Financial Reporting Requirements* (July 18, 2012)
- Workforce Investment Act Directive WIAD05-18 Subject: *Dislocated Worker 25 Percent Funding Policy* (June 14, 2006)
- WIAD04-22 Subject: *State Required Surveys of Dislocated Workers* (June 15, 2005)
- WIAD02-9 Subject: *Worker Displacement Prohibition* (November 22, 2002)
- Workforce Services Information Notice WSIN15-21 Subject: *Implementation of the CalJOBS Customer Relations Management* Module (December 30, 2015)

## BACKGROUND

Federal law requires that states set aside not more than 25 percent of their WIOA Dislocated Worker funding for two statewide activities:

1. Rapid Response to assist workers and businesses at risk of layoff or affected by layoff.
2. Additional Assistance for Local Boards to apply for if there is a significant increase in unemployment in their areas caused by plant closure, downsizing, natural disaster, or "other events."

Federal law provides discretion to the Governor to develop specific policy. In California, current policy is to formula-allocate the Rapid Response funds (half of the total 25 percent funds) to Local Workforce Development Areas (Local Area).

California's Rapid Response system has evolved since the implementation of WIA, with Local Boards leading innovative and proactive local Rapid Response systems. In addition, the WIOA requires states and Local Areas to include layoff aversion as an integral component of Rapid Response policy.

In response to this evolution, the State Board established a Rapid Response/Layoff Aversion Workgroup to consolidate various state guidance into a single comprehensive document and to recommend policy, consistent with the WIOA, that requires proactive business engagement and layoff aversion strategies that can assist a business to avoid layoffs through an incumbent worker training program, use of the Work Sharing Program, or in the event of layoffs, assists workers in quickly re-entering the workforce through rapid re-employment services.

**Rapid Response**

The primary purpose of Rapid Response as stated in federal guidance is to enable affected workers to return to work as quickly as possible following a layoff, or to prevent layoffs altogether. To accomplish this, the workforce development system must be coordinated, comprehensive, and proactive in communicating with business. This includes providing labor market and workforce information, integrating industry requirements into training strategies and career pathways, brokering relationships and job connections, making services efficient and easy to access, and coordinating with regional partners to reduce duplication.

A sound business engagement infrastructure should include early warning systems, which are necessary to ensure a timely response to worker dislocations. Early indicators can be recognized in a variety of ways, including through close communication with employer representatives, industry groups, organized labor, utilities, or through local media. Rapid Response also tracks labor market trends, increased Unemployment Insurance claims, public announcements through the California Worker Adjustment and Retraining Notification (WARN) Act notices, and analyzes economic data to assess the health of businesses. In each region, systems should be in place to regularly monitor all potential early warning indicators and notification channels, and employers must be informed about their legal responsibilities to issue advance notifications of layoffs and closures.

It is critical that regional business engagement teams build relationships with employers, labor organizations, workforce and economic development agencies, training institutions, service providers and community-based organizations. Proactive business engagement systems rely on good intelligence. Their value to economic development efforts can be increased by providing ready access to information regarding available talent. Regions can gain a competitive edge when they can leverage accurate information about regional economic trends, labor markets, new business development, impending layoffs, regional assets, and education and training resources.

**The Role of Layoff Aversion**

A layoff aversion strategy helps employers retain a skilled workforce and/or provides workers rapid transition to new employment, minimizing periods of unemployment. Layoff aversion is a central component of a high-performing business engagement strategy, requiring a shared responsibility among numerous partners at the state, regional, and local levels.

It is important to emphasize that Rapid Response does not stop layoffs. The intent of layoff aversion as a business engagement strategy is to provide business solutions to companies that want to save jobs. To save jobs, a business engagement team must be able to identify an at-risk company well in advance of layoffs, get executive level commitment to work together, assess the needs of the company, and deliver solutions to address risk factors. This requires a new culture of prevention and a strong infrastructure, including clarity of roles among regional partners. It requires data collection and analysis of regional labor market and industry sector trends, early warning mechanisms that can alert of problem areas and well-trained staff with capacity to build relationships among businesses, labor organizations and civic leaders.

Led by regionally coordinated Local Boards, business engagement teams should be built on regional partnerships among a range of organizations and intermediaries that can help identify and design appropriate business and employment solutions. Local Boards should include a variety of partners including the Department of Commerce's Trade Adjustment Assistance for Firms, the Manufacturing Extension Partnership or other sector-based partnerships, public and private economic development entities, Chambers of Commerce, Small Business Development Centers, community-based organizations, community colleges, local labor councils, and others.

Business engagement activities such as customized training, incumbent worker training, and work sharing strategies are among the many WIOA funded strategies that the workforce system can deploy to assist companies in averting layoffs.

As described in the Department of Labor's (DOL) TEGL 03-15, incumbent worker training provides both workers and employers with the opportunity to build and maintain a quality workforce. Incumbent worker training can be used to help avert potential layoffs of employees, or to increase the skill levels of employees so they can be promoted within the company and create backfill opportunities for the employers. Under Section 134(d)(4) of WIOA, Local Boards can use up to 20 percent of their adult and dislocated worker funds to provide for the federal share of the cost of providing incumbent worker training. Incumbent worker training needs to take into account the following factors:

- The characteristics of the participants in the program.
- The relationship of the training to the competitiveness of a participant and the employer.
- Other factors the State or Local Boards may determine appropriate (e.g., the number of employees participating in the training, wage and benefit levels of those employees [both pre and post participation earnings]), and the existence of other training and advancement opportunities provided by the employer).

Employers are required to pay for a significant cost of the training for those participants in incumbent worker training; this can be done through both cash and/or in-kind payments. The wages paid to participants, while in training, may be considered as a source of matching funds. Rules for matching funds are provided in the Uniform Guidance and DOL exceptions at 2 CFR 200.306 and 2 CFR 2900.8, respectively. Under Section 134(d)(4)(D) of WIOA, the minimum amount of employer share in the incumbent worker training depends on the size of the employer:

- **At least 10** percent of the cost for employers with 50 or fewer employees
- **At least 25 percent of the cost for employer**s with 51 to 100 employees
- **At least 50 percent of the cost for employer**s with more than 100 employees

Employer share must be reported on the ETA-9130 quarterly financial report. The DOL encourages states and Local Areas that use incumbent worker training to ensure contracts with employers provide sufficient information to include participants in reporting. Incumbent workers should be reported in the WIASRD under element number 911 until a new reporting layout is available.

**Definitions and Resources**

*Business Cycle* – A business cycle is identified as a sequence of four phases:

- Contraction – A slowdown in the pace of economic activity
- Trough – The lower turning point of a business cycle, where a contraction turns into an expansion
- Expansion – A speedup in the pace of economic activity
- Peak – The upper turning of a business cycle

*Customer Relationship Management Module (CRM)* – The CRM is a CalJOBS$^{SM}$ based tool, supported by the Employment Development Department (EDD), which allows Local Boards and their partners who have access to the CalJOBS system to record, track and report a variety of business engagement activities at the individual company level.

*Economic Development* – The International Economic Development Council defines economic development as a program, group of policies, or activity that seeks to improve the economic well-being and quality of life for a community, by creating and/or retaining jobs that facilitate growth and provide a stable tax base. For a good resource, see the California Association of Local Economic Development and the Governor's Office of Business and Economic Development.

*Employer Contact (Rapid Response 121 Report)* – A visit to an employer by staff for the purposes of conducting Rapid Response activities. This visit may be in person, by telephone or through the use of other interactive technology. This is a cumulative report.

*Employer Contact (122 Report)* – This form is used only to report the development, implementation and completion of a business solution strategy(s) relating to and resulting in job retention at the current place of employment and the rapid re-employment (talent transfer) of affected workers. This is a cumulative report.

*Employment Training Panel* *(ETP)* – The ETP provides incumbent worker training funding to employers to assist in upgrading the skills of their workers through training that leads to good paying, long-term jobs. The ETP is a funding agency, not a training agency. Businesses determine their own training needs and how to provide training. ETP staff is available to assist in applying for funds and other aspects of participation.

*Incumbent Worker* – An employee of a business applying for incumbent worker training funds to up-skill and/or retrain in accordance with the WIOA.

*Incumbent Worker Training* – Developed with an employer or employer association to upgrade skills of a particular workforce. The employer agrees to retain the trained worker(s) upon completion of the training. Frequently, such training is part of an economic development or layoff aversion strategy.

*Jobs Retained* – A layoff is averted when (1) a worker's job is retained with the current employer that is at risk of downsizing or closing, or (2) when a worker at risk of dislocation transitions to a different job with the same employer.

*Layoff Aversion* – The process of using a series of activities, studies, and networks to examine a business or sector's cycle, organizational conditions, markets, and broad community relationships etc., in an effort to determine workforce and economic solutions that can mitigate job loss or save jobs.

*Manufacturing Extension Partnership* *(MEP)* – The National Institute of Standards and Technology's Hollings MEP works with small and mid-sized U.S. manufacturers to help them create and retain jobs, increase profits, and save time and money. The MEP also works with partners at the state and federal levels on programs that put manufacturers in position to develop new customers, expand into new markets and create new products.

*Rapid Re-Employment (Talent Transfer)* – A laid off worker is hired by a different employer and experiences short term unemployment (45 calendar days or less). To qualify for this activity, a confirmed job offer must be on file from the hiring employer and issued within 45 days of the date the participant becomes unemployed.

*Small Business Development Centers of California (SBDC)* – The SBDCs provide training and no-cost one-on-one counseling to help small businesses and entrepreneurs overcome obstacles to growth. Topics range from: start-up assistance, planning for growth and expansion, technology and innovation and access to capital.

*Work Sharing Program/Short Term Compensation* – Work Sharing is described in Section 1279.5 of the California Unemployment Insurance Code and provides employers with an alternative to layoffs and provides their employees with the payment of reduced Unemployment Insurance benefits. Note: This activity is considered a job saved/retained as this strategy does minimize the impact on the Unemployment Insurance fund and should be reported on the Layoff Aversion Form 122.

## POLICY AND PROCEDURES

The EDDs WSIN15-21 communicated to the local workforce system the availability of a new module for CalJOBS. Local Boards and their staff responsible for business outreach activities are strongly encouraged to use this module to track all business engagement activities. Local Boards are encouraged to provide access to and training for the CalJOBS CRM module, as use of this module regionally across Local Areas will help eliminate duplicate contacts from local/regional agencies to the same employers, provide information regarding historical activities and the types of activities being conducted with an individual employer.

On May 18, 2004, the State Board adopted a Dislocated Worker 25 percent funding policy, which includes the following components and related recommendations.

**Dislocated Worker 25 Percent Set-aside**

State Board policy specifies that the state will set aside 25 percent of the state's WIOA Dislocated Worker funding for California's Rapid Response System and for Additional Assistance to dislocated workers in Local Areas. Of this 25 percent, one-half is reserved for Rapid Response activities and one-half is reserved for Additional Assistance to Local Areas. The state will reserve a portion of the 25 percent Additional Assistance funds for statewide dislocated worker activities.

*Rapid Response Funding*

The Rapid Response set-aside funds will be allocated based on a three-part formula and layoff aversion component as follows:

- **Baseline funding** is allocated equally among Local Areas to ensure, at a minimum, that some capacity exists in each Local Area for the coordination and conduct of Rapid Response activities. Allocations to Local Areas comprised of more than one county will include an additional allocation of $50,000 for each additional county. Of the Rapid Response set-aside funds, 30 percent will be reserved for this baseline funding

- **Layoff-based funding** is for Local Areas that serve regions where significant numbers of dislocation events occur. This allocation will be based on quantitative layoff data. Funds will be allocated to Local Areas in proportion to the number of affected workers offered Rapid Response services in response to layoffs reported to the state. This methodology will ensure California meets WIOA requirements to provide services to assist groups of workers affected by mass layoffs, permanent business closures, and natural or other disasters. Of the Rapid Response set-aside funds, 45 percent will be reserved for this layoff-based funding.

- **Hold-Harmless** minimizes funding losses from year-to-year. A portion of the Rapid Response set-aside funds will be used to ensure that no Local Area receives less than 75 percent of their prior-year share of statewide funds distributed for baseline and layoff-based activities. This policy also limits any Local Area's year-over funding increase to 100 percent of their prior-year allocation.

*Layoff Aversion Funding*

Layoff Aversion activities will be funded from the previously state-held Rapid Response Competitive Solicitation Fund. These funds will be distributed to Local Areas based on the Local Area's relative share of the Rapid Response formula allocations.

*Additional Assistance Funding*

Additional Assistance Funding will continue to be available as currently outlined in WSD13-2, Dislocated Worker Additional Assistance Projects. An updated future policy directive will be issued to separate Additional Assistance from Rapid Response guidance and clarify the policy and procedures for use these funds.

**Uses of Rapid Response 25 Percent Funds**

Attachment 1 describes the required and allowable uses of Rapid Response funds. Layoff aversion activities are a required activity in WIOA. It is the state's policy priority that the full scope of required Rapid Response activities, as described in the WIOA, must be provided in each Local Area.

The scope of business solutions that may be provided at Rapid Response events is not restricted to the activities described in Section 134 of WIOA. Local Boards are encouraged to leverage other local or state funding sources to provide a broader scope of business solutions. Examples include assisting with Trade Adjustment Assistance, Unemployment Insurance claim filing, economic development, financial assistance counseling, and mental health counseling.

**Reporting**

Baseline, layoff-based, and hold-harmless Rapid Response funds will continue to be issued to each Local Board, in the master subgrant, as grant codes 540 and 541. These formula funds may be spent on the wide range of required and/or allowable activities. Participants receiving

Additional Assistance services must be enrolled in grant code 241. Local Boards shall continue to report participant enrollments receiving incumbent worker training using Rapid Response formula funds under grant code 2274.

Layoff Aversion funding will be issued under grant codes 292 and 293 in each Local Board's master subgrant. These funds can be spent and the wide range of required and/or allowable activities. Local Boards are to report participant enrollments receiving incumbent worker training using layoff aversion funds under grant code 2274.

*Rapid Response Reporting Requirements (121 Report)*

Activities to be included on the Rapid Response 121 Report are those relating to employer contacts in response to layoffs or closures, as defined by the State Board. The Rapid Response 121 report must be completed to report <u>all</u> employer layoff/closure planning/orientation meetings. Planning meetings and/or orientations of nine or less employees are for <u>information only</u> and will not be used in the calculation of the dislocation-based formula funding factor.

Complete a separate line item entry for each employer contact occurring on different days, locations, or employers. Complete a single line item entry if multiple sessions are conducted on the same day, for a single employer with the note of how many multiple orientations were made that day. Note – this is a cumulative report.

The Rapid Response 121 Report and line item instructions are included as Attachments 2 and 3. The Rapid Response 121 Report must be completed quarterly and submitted via email by the 20th of the month following the quarter's end to the Local Area's assigned Regional Advisor, with a "cc" to the Local Area administrator.

*Layoff Aversion Reporting Requirements (122 Report)*

This is a new report, specifically developed to capture and report business solution strategies delivered to business during any stage of the business cycle that relate to and result in job retention and/or rapid re-employment. A 122 Report may be submitted for a "single" job retained at an existing employer and/or a single rapid re-employment with a different employer. It is important that Local Area staff consider and document how layoff aversion activities will result in a positive outcome before allocating resources. Note – this is a cumulative report. It is <u>not</u> a register of local activities. It is to be used to report <u>only</u> business solutions (incumbent worker training to prevent a layoff, Work Sharing or Talent Transfer) completed during the reporting quarter.

For completion of the business solution strategy, documentation of outcomes must be attached to the 122 Report and retained locally for audit purposes. Note – the Local Board's administrative, fiscal, and program activities will be subject to the state's monitoring.

The 122 Report and line item instructions are included as Attachments 4 and 5. The 122 Report must be completed quarterly; it is a cumulative report and submitted via email by the 20th of the month following the quarter's end to the Local Area's assigned Regional Advisor, with a "cc" to the Local Area administrator. The reporting period is from April 1 to March 31 of the following year.

## ACTION

Bring this directive to the attention of all relevant parties.

## INQUIRIES

If you have questions, please contact your Regional Advisor at 916-654-7799.

/S/ JOSÉ LUIS MÁRQUEZ, Chief
Central Office Workforce Services Division

Attachments are available on the internet:

1. Required, Allowable and Prohibited Rapid Response Activities
2. Rapid Response 121 Report
3. Rapid Response 121 Report Line Item Instructions
4. Layoff Aversion 122 Activity Report
5. Layoff Aversion 122 Activity Report Line Item Instructions
6. Summary of Comments

**EXHIBIT D**

**CALIFORNIA RAPID RESPONSE PROGRAM**
**BUDGET SUMMARY PLAN**

| | | |
|---|---|---|
| **Applicant Name: Employers' Training Resource** | | |
| **Project Title: Rapid Response Program** | | |
| **Term: July 1, 2025 through June 30, 2026** | | |
| **Initial Application: ☒ Amendment Request: ☐ Amendment #:** | | |
| **I. Budget Detail** | | **Program** |
| A. Staff Salaries | | $27,000 |
| B. Number of full-time equivalents | .4 | |
| C. Staff Benefits | | $13,500 |
| D. Staff Benefit Rate (percent) | 50% | |
| E. Staff Travel | | |
| F. Operating Expenses (communications, facilities, utilities, maintenance, consumable supplies, etc.) | | $9,500 |
| G. Equipment (list, on page 2, items with a unit cost over $5,000) | | |
| H. Tuition | | |
| I. Indirect Costs | | |
| J. Indirect Cost Rate (percent)* | % | |
| K. Supportive Services | | |
| L. Other (describe): | | |
| M. Total Dislocated Worker Assistance | | $50,000 |
| **II. Quarterly Total Expenditure Plan (Specify Year)** | | |
| A. 09/2025 | | $0 |
| B. 12/2025 | | $10,000 |
| C. 03/2026 | | $30,000 |
| D. 06/2026 | | $50,000 |

**EXHIBIT E**

# REPORTING REQUIREMENTS

*Rapid Response Reporting Requirements (121 Report)*

Activities to be included on the Rapid Response 121 Report are those relating to employer contacts in response to layoffs or closures, as defined by the State Board. The Rapid Response 121 report must be completed to report all employer layoff/closure planning/orientation meetings. Planning meetings and/or orientations of nine or less employees are for information only and will not be used in the calculation of the dislocation-based formula funding factor.

Complete a separate line item entry for each employer contact occurring on different days, locations, or employers. Complete a single line item entry if multiple sessions are conducted on the same day, for a single employer with the note of how many multiple orientations were made that day. Note – this is a cumulative report.

**The Rapid Response 121 Report information will now be entered into CalJOBS – please see Attachment *CRM for Rapid Response*. The information must be entered quarterly and submitted by the 15th of the month following the quarter's end.**

*Layoff Aversion Reporting Requirements (122 Report)*

This is a new report, specifically developed to capture and report business solution strategies delivered to business during any stage of the business cycle that relate to and result in job retention and/or rapid re-employment. A 122 Report may be submitted for a "single" job retained at an existing employer and/or a single rapid re-employment with a different employer. It is important that Local Area staff consider and document how layoff aversion activities will result in a positive outcome before allocating resources. Note – this is a cumulative report. It is not a register of local activities. It is to be used to report only business solutions (incumbent worker training to prevent a layoff, Work Sharing or Talent Transfer) completed during the reporting quarter.

For completion of the business solution strategy, documentation of outcomes must be attached to the 122 Report and retained locally for audit purposes. Note – the Local Board's administrative, fiscal, and program activities will be subject to the state's monitoring.

**The 122 Report information will be entered into CalJOBS – please see Attachment *CRM for Rapid Response*. The information must be entered quarterly; it is a cumulative report and submitted by the 15th of the month following the quarter's end.**

The Rapid Response Quarterly Report must be completed quarterly. Please submit the report by the 15th of the month following the quarter's end to Marina Tapia via email mtapia@lacooperativa.org.

## Categorization of Rapid Response Activities
## Title 20 Code of Federal Regulations Notice of Proposed Rule Section 682.330

| Activity | Required | Allowable | Prohibited |
|---|---|---|---|
| Conducting planning meeting with employer | X | | |
| Assessing layoff aversion potential | X | | |
| Conducting orientation meeting with employees | X | | |
| Providing TAA orientation | X | | |
| Delivering/mailing Rapid Response informational materials | X | | |
| Providing access to CalJOBS℠ and SkillsMatch on-site, using company's or mobile facility | X | | |
| Enabling participants to register with America's Job Center of California℠ onsite | X | | |
| Job fair or information expo focused on one or more dislocation events, at or not at the dislocation site | X | | |
| Coordinating Labor-Management/Workforce Transition Committee | X | | |
| Providing information about services available in the AJCCs and setting up systems to provide on-site access to information and services | X | | |
| Providing training orientation on industry specific opportunities (ex: Biotech) | X | | |
| Providing resources for food, shelter, clothing and other emergency assistance | X | | |
| Conducting Business Engagement Activities | X | | |
| Conducting Research on Business Activities | X | | |
| Devising layoff aversion strategies with employer | X | | |
| Providing layoff aversion technical assistance to employer | X | | |
| Conducting business services workshops | X | | |
| Training affected workers to upgrade skills for another position in company | X | | |
| Attending Regional Roundtable | | X | |
| Attending conferences | | X | |
| Conducting interview technique workshops | | X* | |
| Conducting job search assistance and resume writing workshops | | X* | |
| Completing Unemployment Insurance applications | | | X |
| Job fair or information expo not related to a dislocation event | | | X |

* Local Workforce Development Areas may conduct group workshops (e.g. job search assistance and/or resume writing workshops) as part of on-site Rapid Response to business closures or significant layoffs and charge the cost to their 25 Percent Rapid Response funds if they have determined, in consultation with the local workforce services manager, that EDD workforce services staff are not available to conduct such workshops.

ATTACHMENT 2

**Name of Reporting Local Area:** ______________________
**Local Area Lead RR Contact Person:** ______________________
**Email address:** ______________________
**Telephone Number:** ______________________
**Fax Number:** ______________________

Date submitted: ______________________
Quarter Ending: ______________________

**INSTRUCTIONS: Activities reported on the Rapid Response 121 Report are those relating to visits in response to layoffs or closures, as defined in this Directive. Reportable visits include Worker Adjustment and Retraining Notification (WARN) and non-WARN events. The Rapid Response 121 Report must be completed for all layoff/closure planning/orientation meetings. Planning meetings and orientations for 9 or less employees are for information only and will not be used in the calculation of the dislocation-based formula funding factor. Complete a separate line item entry for each visit occuring on different days, locations or employers.**

**Complete a single line item entry if multiple sessions are conducted on the same day, at a single location, and for a single employer with the note of how many multiple orientations were made that day. The Rapid Response 121 Report is cumulative, must be completed quarterly and submitted via e-mail by the 20th of the month following the quarter end to the assigned Regional Advisor, with a "cc" to the Local Workforce Development Area (Local Area) Administrator. For example, submit the 03/31 report by 04/20.**

| Date of Visit | Reason for On-Site Visit: Planning (Plan) or Orientation (OR) | Was more than one orientation conducted per day? Y/N | If multiple orientations per day, how many? | Company Name | Street Address | City | Zip Code | Industry Sector Code/Title | Date of Layoff that Caused Visit | Total number of affected employees | Number of affected employees who actually attended orientation | Comments |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
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**RAPID RESPONSE 121 REPORT**
**LINE ITEM INSTRUCTIONS**

The Excel Spreadsheet Report is designed to collect data to be considered as a factor in the process of allocating Rapid Response funds to Local Workforce Development Areas (Local Area). Activities reported on the Rapid Response 121 Report are those relating to employer contacts in response to layoffs or closures, as defined by the California Workforce Development Board. Reportable employer contacts include Worker Adjustment and Retraining Notification (WARN) and non-WARN events. The Rapid Response 121 Report must be completed to report all employer layoff/closure planning/orientation meetings. Planning meetings and/or orientations of nine or less employees are for <u>information only</u> and will not be used in the calculation of the dislocation-based formula funding factor.

Complete a separate line item entry for each employer contact occurring on different days, locations, or employers. Complete a single line item entry if multiple sessions are conducted on the same day, for a single employer with the note of how many multiple orientations were made that day.

The Rapid Response 121 Report is cumulative, and must be completed quarterly and submitted via email by the 20th of the month following the quarter's end to the assigned Regional Advisor, with a "cc" to the Local Area administrator.

| | |
|---|---|
| Date | Date on which the Local Area staff provided Rapid Response planning services to a company where workers are being laid off or date that orientation was provided to affected workers. If the services span more than one day or extend to more than one site, complete a separate line item entry for each day and/or site. |
| Reason for Visit | Enter "OR" for an orientation provided to affected workers or "PLAN" for an employer planning meeting. |
| Company Name | Name of the company. |
| Street Address | Street address of company, which is location where Rapid Response services were provided. |
| City | City of company. |
| Zip Code | Zip code of company. |
| Industry Sector (NAICS Code) | Select item from drop down menu. |
| Date of Layoff | Date of first layoff. |
| Total number of affected employees | Enter the total number of employees affected by the layoff/closure. If multiple local areas participate in a joint meeting, the local areas must agree on the division of the affected workers to report on the RR121. The aggregate shall not exceed that the total number of affected workers for the event. |
| Number of affected employees who attended | Enter number of employees who attended the orientation. |
| Comments | Additional comments, notes, explanations. |

**Name of Reporting Local Area:** ______________________

**Contact Person:** ______________________

**Email:** ______________________

**Telephone:** ______________________

**Fax:** ______________________

Date Submitted: ______________________

Quarter Ending: ______________________

**INSTRUCTIONS - Activities reported on the Layoff Aversion (LOA) 122 Report are those relating to business solution strategies delivered, and/or providing Rapid Re-Employment Services, by Local Workforce Development Area (Local Area) staff and/or partners, to businesses during any stage of the business cycle. It is important that the Local Area staff consider and document how layoff aversion activities will result in a positive outcome before allocating resources. For completion of the layoff aversion activity, documentation from the business receiving the solution and/or the business rapidly re-employing is required for validation of outcomes. Copies of documentation must be submitted with the 122 Report and also retained locally. Note: This is a cumulative report.**

| Date of Initial Contact | Company Name (Company Retaining Jobs) | Company Name (Company hiring for Rapid Re-employment within 45 calendar days after becoming unemployed) | City | Start Date of LOA Solution Delivery (or) Termination Date for Rapid ReEmployment | End Date of LOA Solution Delivery (or) Rapid Re-employment date (45 calendar days) | Business Solution Delivered | Industry Sector Code/Title | Local Area Priorty Sector (Yes / No) | # of Jobs Retained | # Rapidly Re-employed | Documentation from Employer for # of Jobs Retained (Yes / No) | Documentation from Employer for # of Rapid Re-Employment (Yes / No) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | |
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EDD Employment Development Department State of California

# Rapid Response
# Quarterly Narrative Report
# PY 2025-26

*E-mail report to La Cooperativa (Marina Tapia at mtapia@lacooperativa.org ) by the 15th day after the end of the quarter.*

| | | | |
|---|---|---|---|
| Grantee Name: | | Grant Code: | 541 |
| Contact Name: | | RA Name: | Teri Brimacomb |
| Email Address and Telephone: | | Date Report Submitted: | |

Reporting Quarter: ☐ JAN – MAR ☐ APR - JUN ☐ JUL - SEPT ☐ OCT – DEC

1. Project Expenditures

| Total Award | Amount Expended this Quarter | % Expended | Balance |
|---|---|---|---|
| | | | |

2. Contractors

| Name of Contractor | Amount Expended this Quarter |
|---|---|
| | |
| | |
| | |

3. Activity Data

| Type of Activity | Number Completed |
|---|---|
| Local Board Meetings Attended | |
| Employer Meetings Attended | |
| Orientation Planning Meetings Participated In | |
| Orientations Hosted | |
| Orientations Attended that were Hosted by Local Boards | |
| Affected Employees assisted at Rapid Response Orientation | |

| Type of Activity | Number Completed |
|---|---|
| Roundtable Meetings Attended | |
| Statewide Meetings Attended | |
| Trainings Given | |
| Other Events/Meetings Attended | |
| Jobs Saved with Layoff Aversion | |

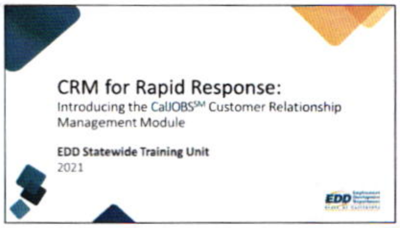
4. Describe your Rapid Response coordination efforts to create and maintain partnerships with the Local Workforce Development Boards, targeted population businesses and job seeker communities, and partners during this quarter, such as attending meetings, developing layoff aversion strategies, etc.

5. Describe any outreach materials that were developed and how they were distributed to the targeted population.

6. Describe any other major activities for this quarter, including successful strategies, achievements, and success stories.

7. Describe any project challenges, concerns, or possible delays experienced this quarter. How do you intend to resolve them in the next quarter?

8. Describe any technical assistance that the state can provide that would support or accelerate your efforts.



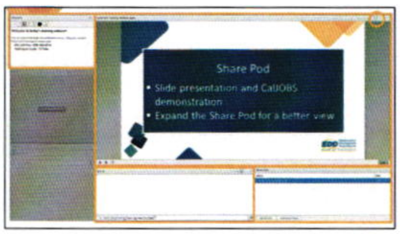

Hello everyone and welcome to the CRM for Rapid Response training! Thank you for taking the time to join us for this look at the benefits of using the CRM module in the CalJOBS℠ system when you are assisting employers with Rapid Response activities. **We're glad to share it with you.**

My name is __________, and I have with me ________ and __________ of the Statewide Training Unit.




Before we begin our training, there a few items within the Adobe Connect room we would like to highlight.






First, as you can see, we no longer include a Sign-In pod, as you have already signed in through our new registration system when you entered the room. This should help us provide a more accurate count of our webinar participants.

**[Animation click]** On the top left-hand side of your screen, you will see the Welcome Pod. We have included the conference line and access code for anyone who would prefer to listen in over their phone. If at any point you have trouble hearing us through your computer, feel free to call in through the conference line. Please be aware that the **conference line is in "Broadcast" or listen**-only mode. That means, you can hear us, but we cannot hear you.

**[Animation click]** Next, on the bottom left-hand side of the screen you will find the Q&A Pod. If you would like to pose a question you can do so by typing it into the dialog box at the bottom. We will either reply to you in the dialog box or read you question aloud and respond verbally. We encourage you to ask any question about the content of the training or questions related to the training topic. If there are questions that we **can't answer, we may need to do a little research first and get back to you.**

**[Animation click]** To the right of the Q&A Pod you will find the Resources Pod. This is

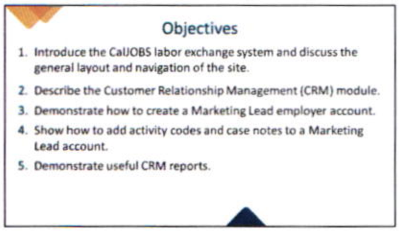


where we will upload any documents related to the training that we would like to share with you, including the PDF slide deck(s) for the presentation. To download these documents, simply highlight the item(s) and select the Download File(s) button. The files will then appear in a new browser window with instruction on how to open or save them

**[Animation click]** Finally, the large Share Pod in the center of the screen is where we will display the presentation slide deck or the CalJOBS training site for our live demonstration.

**[Animation click]** Please note, to get a better view of the presentation/demonstration you can enlarge the Share Pod to full-screen mode by selecting the icon with four arrows pointing outward. If you would like to then access the Q&A or Resources pods, you can return to the standard view by reselecting the icon, now with four arrows pointing inward.

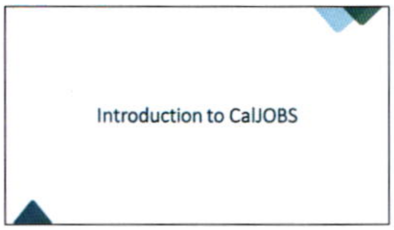





The objectives for this webinar include the following:

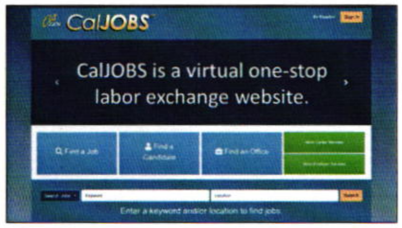
1. **[Animation click]** Describe the Customer Relationship Management (CRM) module and identify the benefits of using the CalJOBS CRM module
2. **[Animation click]** Demonstrate how to create a Marketing Lead employer account
3. **[Animation click]** Show how to and add activity codes and case notes to a Marketing Lead account
4. **[Animation click]** Discuss additional features in the CRM module






**Let's start by taking talking about CalJOBS in the broadest terms as California's** statewide labor exchange system with various types of users.

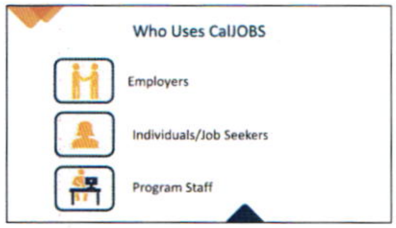





The Workforce Innovation and Opportunity Acts (WIOA) mandates that every state maintain a statewide labor exchange system that connect job seekers and employers. CalJOBS serves that purpose for the state of California, allowing employers to post job openings and job seekers to search for opening in their industry. But as we will see, CalJOBS does a lot more besides.

For instance, CalJOBS **is our state's system of record for all WIOA programs, meaning** that we use CalJOBS to gather the data we report to the Department of Labor.






So, who uses CalJOBS?

**ČalJOBS** is utilized by three main customers:

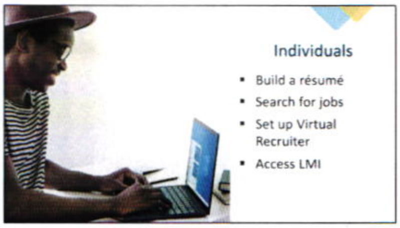
- Employers
- Individuals (or job seekers)
- Program Staff

Each customer uses CalJOBS in a different way, but all of these customers use the system to engage in the labor exchange system and workforce development **community. Let's take a look at each customer and which common features they utilize.**




Here are a few of the services available to Employers:
- Post jobs
- Recruit candidates for a job
- Access Labor Market Information
- Send correspondence to job seekers

We will discuss how employers use CalJOBS, and how program staff can best assist employers, in our Employer Services training series.




Individuals who use CalJOBS include adults, dislocated workers, youth, veterans, job seekers, those collecting unemployment insurance benefits, and people looking for a new career path.

A few features available to individuals within CalJOBS include:

- Build a résumé- A registered individual can choose from several different methods to build a résumé in CalJOBS.
- Search for jobs- use a variety of search options to find the right job
- Set up a Virtual Recruiter- allows job seekers to automate the task of searching for available job openings

We will discuss how job seekers access and utilize these features, and how program staff can best assist them, in our Building Power User training series. We will also be **discussing Assisting Job Seekers Remotely: CalJOBS from a Job Seeker's Perspective in** our next webinar on Friday.




**An individual or an employer can go to a local America's Job Center of California (AJCC)** for assistance in finding a job, learning about the possibilities of job training, or posting **a job and searching for candidates. Let's take a look at how staff use CalJOBS to assist in** these functions.

Staff who use CalJOBS may be an EDD employee, a local area staff, or a non-local area staff.

**This list we've provided is not exhaustive, but we want to give you an idea of how Staff** can use the system:

- Provide job search assistance- help individuals build their profile, help create résumés, and help set up Virtual Recruiter
- Complete applications and enroll in programs
- Track services
- Run reports

We will be offering a wide array of training webinars that cover all of these features in CalJOBS for program staff in the weeks and months ahead. You can learn more about

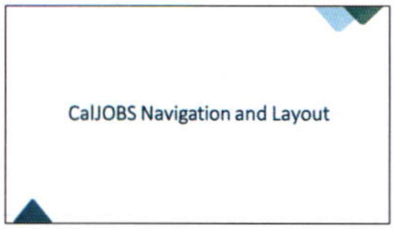


these training webinars in the CalJOBS Training Webinar Series Schedule for 2021 available in the Resources pod.



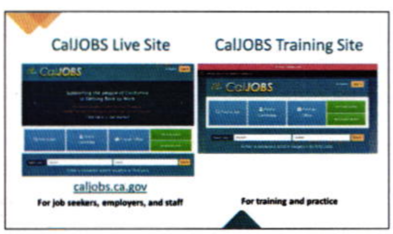

As you can see, CalJOBS is a valuable tool that can link qualified job seekers with employers, help individuals to find job training, and assist staff to manage WIOA program applications, eligibility, services, and reports, all with the end goal of improving employment outcomes in the State of California.






**Now that we have discussed CalJOBS in its broadest sense, let's now** review the basic layout and navigation tools that can be utilized when using CalJOBS.



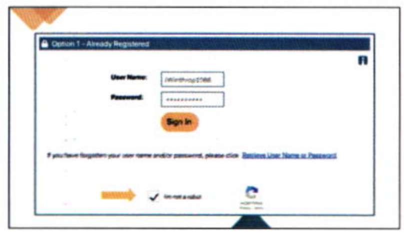



There are two CalJOBS websites:

The CalJOBS Live Site is managed by the CalJOBS Operations Unit. This site is used by job seekers, employers, and staff and has real, live data.

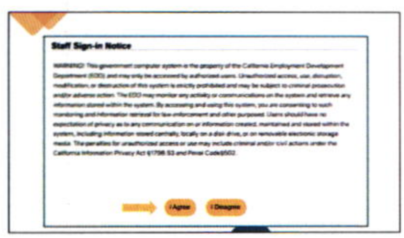
The Training Site is managed by the statewide Training Unit (STU). This site is only available to staff, who can use it to learn and practice in the system. The individuals and employers shown in the training site are fictional, but it does access actual job postings.


The CalJOBS CRM module is embedded and available in the CalJOBS system. In order to create an employer account, navigate to the **www.caljobs.ca.gov homepage or "splash page." Once there,** they simply select the Sign In link at the top right-hand corner and follow the instructions to sign in to your CalJOBS staff account.




You will log in to your staff account by entering your Username and Password into the appropriate fields. Then you will need to check the box next to the **"I'm not a robot"** reCAPTCHA field. Once you have checked the reCAPTCHA box and entered your username and password, you can select **Sign In**.





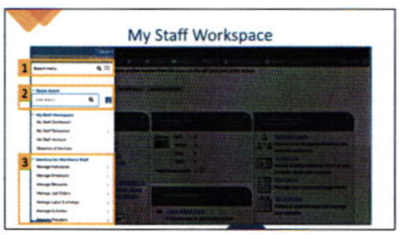

Read the **Staff Sign-in Notice, select "I Agree".**


The first screen you will see is **My Staff Workspace**.

There are six key areas:

1. At the top of the screen, there are short-cut links (**Home, Accessibility, My Dashboard, Sign Out**, etc). These links follow throughout all navigation of CalJOBS.
2. At the top right of all screens there is a magnifying glass icon for conducting a **Quick Search**. This allows staff the ability to quickly conduct a search of job postings, employers, candidates, or LMI by keyword and location.
3. Near the top of the page, there are blue and gray tabs going horizontally across the page (**My Dashboard, My Staff Resources, My Staff Account**, and **Directory of Services**), which provide you with one way of navigating around CalJOBS.
4. The widgets that fill the rest of **My Staff Workspace** are shortcuts to frequently-used tasks and pages. The widgets are customizable, so you can move them, collapse them, and delete them per your preferences.
5. Finally, at the top left corner of the screen there is a hamburger **Menu** that you can select to expand a navigation menu.






Once you have selected the hamburger Menu, an extensive navigation menu will appear, which provides you with another way to navigate around CalJOBS. We usually call this the **Left-Hand Navigation Menu**. Once opened, the menu will overlay the current CalJOBS page, which will also appear grayed out while the menu is open.

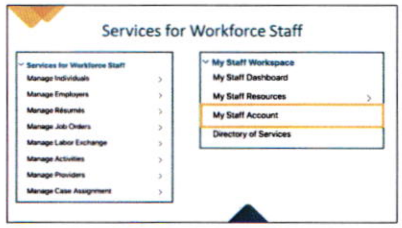
1. One new features within the left navigation meu include a new **Search Menu** box that allows you to search for and access the menu option you are looking for. You can also enter a partial option name in the top search box, and the menu adjusts to show the options meeting that search string. A second new feature is the **Show or Hide Link Descriptions** icon that toggles short descriptions of each menu option on or off.
2. There is a Quick Assist search box that allows you to quickly search for an individual **or employer. You can select the "I" icon to see a list of identifying information you** can use in the Quick Assist search box.
3. The left-hand navigation menu now includes a dynamic drill-down with no fly-outs. Rather than showing fly-outs, the menu changes to display the drill-down options (and includes an arrow to return to the previous menu).

Note: The left-hand navigation menu is also customizable if you go to **My Staff**



**Resources > My Preferences > Configure what menu groupings appear.**

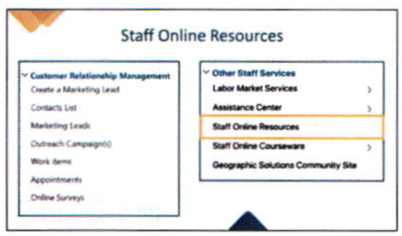





One of the primary areas you will work is within the **Services for Workforce Staff** left navigation menu. Here you will be able to select **Manage Employers** in order to **Assist an Employer and Create an Employer** (i.e. create a new CalJOBS account on behalf of an employer) Once you are assisting an employer, you can then add activity codes and case notes, among other services.

Within the **My Staff Workspace** menu, you can use the **My Staff Account** to access your CalJOBS account information. From there you can edit account information, change your password, and customize the content you are interested in, such as landing pages, display options, or the number of individuals recently assisted you would like displayed on the individual search page.

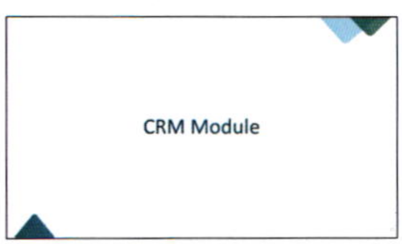





Most of our session today, however, will focus on the Customer Relationship Management (CRM) module, which has its own menu grouping.

Finally, toward the bottom of the left-hand navigation menu you will find a group heading called Other Staff Services. Withing this menu the Staff Online Resources option takes you to a CalJOBS page that includes links to CalJOBS System Guides provided by our vendor, GSI, as well as a selection of EDD CalJOBS training materials that you can download, including the slide decks for this training series.






**We'll begin by describing the CalJOBS Customer Relationship Management module and** reviewing its features and benefits.




In general, customer relationship management is an approach to coordinating a company's interaction with current and potential customers. In our case, the customers are employers with whom we are – or could potentially – collaborate at career fairs, on-the-job training programs, or other employment services.

CRM software enhances the customer relationship by managing customer interaction, tracking leads, and streamlining processes. A CRM application assists organizations and their business outreach staff to consolidate all company data into one central space. The CRM acts as a hub for all team members to access needed information including, contact information, communication history and customer history. The ability to update data in a centralized location accessible to all employer outreach staff the potential for inaccurate information and the duplication of effort.

Today we are going to discuss the CRM module that is integrated into the CalJOBS system. **But before we do so, let's quickly distinguish between two types of employer** accounts available in CalJOBS, **Marketing Lead** accounts and **Recruiting Employer** accounts.




In the CalJOBS system there are two types of employer accounts that can be created: a Marketing Lead employer account and a Recruiting Employer account (formerly known **as a "Preferred Employer").**

**[Animation click]** A Marketing Lead account is created in the CRM module and is used for an employer who is not fully registered in the CalJOBS system. A Marketing Lead employer does not need to provide their Tax ID number at the time of registration and therefore does not need to be vetted through the system. To create a Marketing Lead, **all you need is an employer's name, primary location information, contact information -- such as the head of HR or the CEO's first and last name and phone number** -- and lastly, the method in which they prefer to receive their CalJOBS notifications. We will provide a live demonstration on how to create a Marketing Lead in the live demonstration in just a few moments.

The purpose of the marketing lead account is that it allows staff to track outreach **efforts. Let's say staff provided services to an employer**--for example, by informing the employer about tax credit benefits they can apply for. Using a Marketing Lead account in the CRM module, staff can record this activity in the CalJOBS system without fully registering the employer and vetting the account.



Because the Marketing Lead employer account is created by staff, the employer will only have limited system access to services in the CalJOBS system. For example, they will not be able to access recruitment tools such as job order management, resume search, and resume alerts.

A Marketing lead can be used to identify potential Recruiting Employer leads. Staff can look at all the employers who have been registered as Marketing Leads to see if they might be converted into Recruiting Employers.

**[Animation click]** A Recruiting Employer – **formerly known as "preferred employer"** – is an employer account that is fully registered in CalJOBS. A Recruiting Employer account goes through the vetting process since the employer will need to provide their EDD Tax ID number.

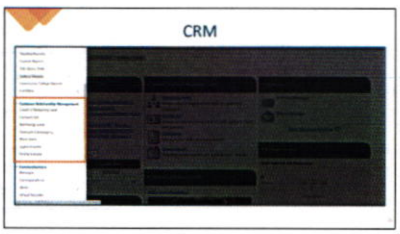
A Recruiting Employer account is created by either a staff member or the employer and is used to recruit job seekers. Unlike a Marketing Lead, a Recruiting Employer has access to CalJOBS recruitment tools, which means they can post job orders, search and view resumes, and set up virtual recruiter alerts.

To recap: the main difference between these two employer accounts is that the Marketing Lead is created to track outreach efforts without having the employer go through the vetting process and the Recruiting Employer account is used to recruit job seekers by gaining access to the recruitment tools available in CalJOBS, in addition to all the features available to the Marketing Lead.

In this webinar, we will focus on the Marketing Lead accounts since these accounts are created in the CRM module.

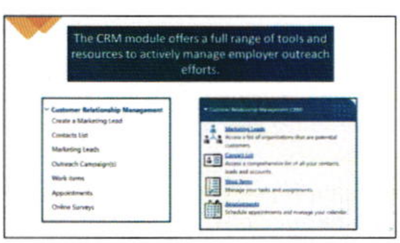

**Staff can access the CRM module from two different areas of their My Staff's** Workspace. **[Animation]** The first location is the CRM widget located under Services. **[Animation]** The second location is in the menu. Click on the menu to expand and see further options, including the CRM module.






By clicking on the hamburger menu, the menu expands and staff can scroll down to find the **[Animation]** CRM options.






**Let's take a look at what the CRM module has to offer Business Services staff:**

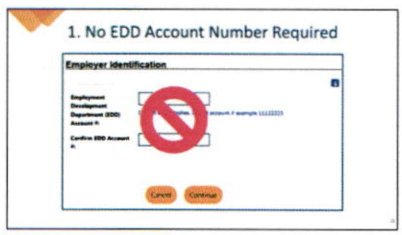
The CRM module offers a full range of tools and resources to actively manage employer outreach efforts more efficiently in a centralized location in the CalJOBS system.

For example, some features that staff can utilize in the CRM module include: using the employer ***Contacts List*** to manage employer outreach; creating an employer To-Do List by using the ***Work Items*** feature; or scheduling appointments with employers through the ***Appointments*** tool. Most importantly, the CRM module allows staff to track and record all services that are provided to employers.




Let's discuss the CRM benefits.



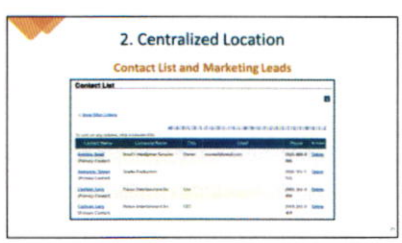



The first benefit of the CRM module is that the Marketing Lead employer account type **does not require staff to enter the employer's EDD Account Number. This is also known** as the employer Tax ID number, or the State Tax ID number **[Animation]**.

**As many of you may know, this hasn't always been the case. Before the implementation of the CRM module, staff were required to enter the employer's EDD account # if they** wished to register the employer in the system.

Because the CRM module is used for tracking staff outreach efforts to the employers of California, the EDD account number is not required. In the outreach stage, staff might not yet have a relationship with the employer to have access to the EDD account **number, or the employer simply isn't interested in using CalJOBS to post jobs or search** for candidates. CRM still allows staff to enter services and case notes to track outreach efforts.






The next benefit of the CRM module is that it provides a central location for staff to organize and manage their ongoing employer outreach work.

For instance, the CRM has two key features that help us manage employer outreach: ***Marketing Leads*** and ***Contact List***.

The ***Contact List*** feature is a directory of the company and contact names of Marketing Lead employers created by staff. In addition, employers that you created as Marketing Leads, but later convert to Recruiting Employers will appear on this list as well. Additionally, staff can add activity codes to the employer accounts that appear on the Contact List.

**For example, let's say you meet a new employer at a job fair event and exchange** business cards. You can create a Marketing Lead employer account for that business and then record and track all of your outreach efforts here within the CRM module.

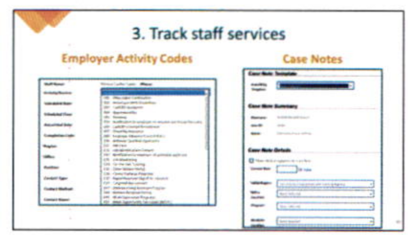
The ***Marketing Leads*** list is identical to the ***Contact List*** screen. The only difference is **that the Marketing Leads list defaults to having the "Marketing Lead" box checked in the "Account Type" section, and therefore only the Marketing Lead account types that**



you have created will appear in the list.

**Additional note:** The information being entered into the CalJOBS system allows business services staff to share information across partner programs and encourages collaboration with one another to provide seamless services to employers.






The third benefit of the CRM module is that it allows staff to track the services they provide to employers.

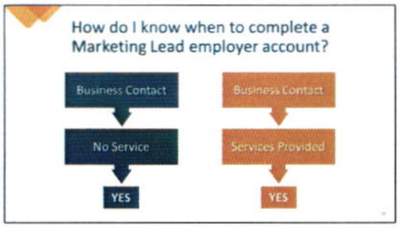
The CRM module allows staff to document the services they provide to Marketing Leads by using ***Employer Activity Codes* [Animation]**. This is important because under WIOA we now have to report employer services to the Department of Labor under the Effectiveness in Serving Employers performance measure, which is one of the six performance indicators mandated by WIOA.

By entering *Employer Activity Codes* into the CRM module, staff can now effectively and efficiently track services for employers without having the employers be fully registered in the CalJOBS system.

In addition, staff can use *Case Notes* **[Animation]** to document interactions with and outreach to employers in detail.




Now that we have explored **the benefits of the CRM module, let's take a look at how** we can create a Marketing Lead account in CalJOBS.




But first, how do you know when to complete a marketing lead employer account in CalJOBS?

Staff can use the CRM module to convert potential business customers into Marketing Leads for purpose of providing assistance to these businesses and tracking the profile details.

In other words, if a staff member makes **[Animation]** a business contact and collects enough information from an employer, **[Animation]** and is going to potentially reach out to provide services, **[Animation]** then the staff member can create a marketing lead account in CalJOBS to reach out at a later time. Also, if a staff member makes **[Animation]** a business contact with an employer and **[Animation]** provides them information and/or an employer service, **[Animation]** then the staff member can create a marketing lead account in CalJOBS and document the activities they provided.

Meet an employer at an event and receive their contact info, You **don't** have their EDD Account Number and they are not interested in posting their jobs in CalJOBS. Enter the employer into CalJOBS as a **Marketing Lead.** You will be able to track services provided and enter information on interactions with the employer.
**Additional example regarding Recruiting employer**: An employer comes into your AJCC and is looking for assistance in hiring qualified candidates

The employer is willing to provide you with their EDD Account Number and other company information. Enter the employer into CalJOBS as a **Recruiting Employer.** You will be able to track services provided and enter information on interactions with the employer. The employer will also be able to post jobs and access candidate resumes and Track referrals and hires.

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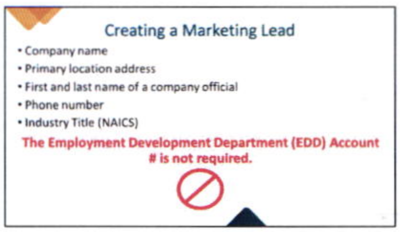


When you create a marketing lead employer account, all you need is the **[Animation click]** company name, **[Animation click]** primary location address, **[Animation click]** first and last name of a company official, and **[Animation click]** phone number.

**[Animation click]** The EDD Account number is not required.

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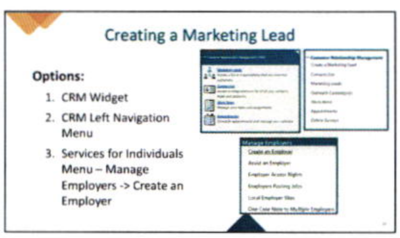


Before we switch **to a live demonstration, let's look briefly at the various ways to create** a Marketing Lead that are scattered throughout CalJOBS.

There are five ways to create a Marketing Lead:

1. **[Animation click]** Through the CRM Widget on the Dashboard
2. **[Animation click]** Using the Create a Marketing Lead link in the CRM tab on the left Navigation Menu
3. **[Animation click]** Through the Create an Employer link in the Manage Employers section of the Services for Workforce Staff tab on the left Navigation Menu

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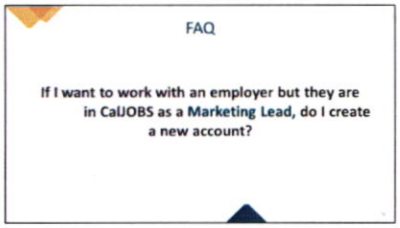


**Let's say you searched for** the employer first, and you see that they are already in CalJOBS as a Marketing Lead. **We often get asked by staff "If I want to work with an** employer but they are already in CalJOBS as a Marketing Lead do I create a new **account?"**

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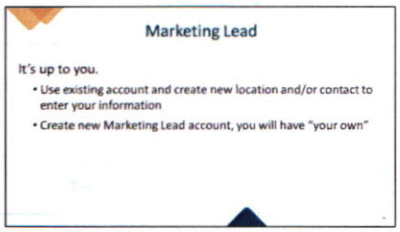


If there is already a Marketing Lead account for the employer you would like to work **with, it's up to you if you would like to use the same account or create a new account.** We recommend you check with your manager to see if you have a Local Area policy around creating duplicate Marketing Leads.

If you use the existing Marketing Lead account, you can add the specific location and/or contact that you are working with to keep all employer information in one account. **However, the system will not stop you if you'd rather create another Marketing Lead** account for the employer. Keep in mind this increases the amount of duplicate entries in the system.

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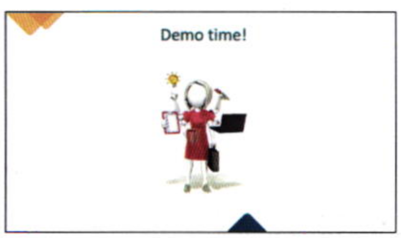


At this point, we have covered what CRM is, what a Marketing Lead account entails, the benefits of using CRM, and we explained the multiple ways to create a Marketing Lead.

Now, **let's now switch to the CalJOBS training site and learn how** to create a Marketing Lead.

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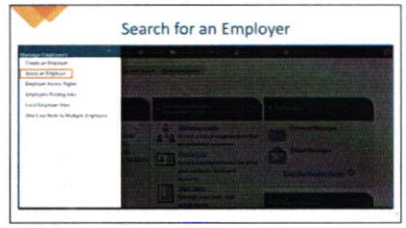


Before you create a Marketing Lead employer account, it is recommended that you first ***search for the employer*** to verify that the employer you interested in providing a business service is not already registered in the CalJOBS system. To do that, select *Assist an Employer* in the Services for Workforce Staff group of the left navigation menu.

Occasionally, employers that you are assisting may already be registered or partially registered in the system.

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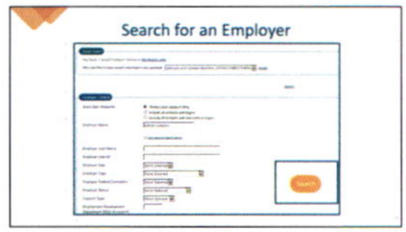


You can search for an employer many ways, including by company name or Tax ID **number. Once you have entered their information, click on the 'Search' button.**

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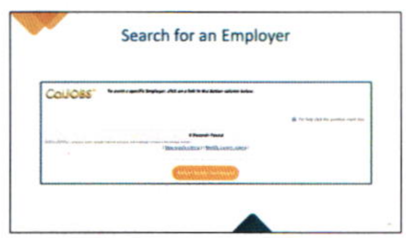


If your search turns up no results – as in this example, where there is no employer with the name Batman Company – you would need to create an employer account.

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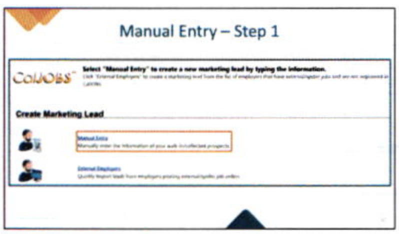
**To do this, let's begin by selecting the *Create a Marketing Lead*** option in the CRM group of the left navigation menu. Ideally, a Marketing Lead should be created as soon as a staff member has made contact with an employer or business customer.



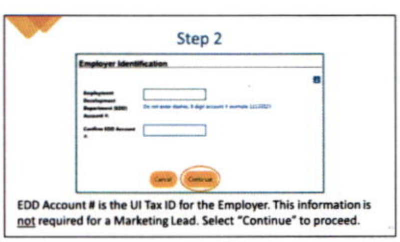



After selecting *Create a Marketing Lead* from the left menu, we can choose from the two methods shown here:

- **Manually enter the information of an employer you're working with, or plan to work** with, or,
- Select from a list of external employers – those employers whose jobs are gathered **and "spidered" into the** CalJOBS system.

**First, let's select** Manual Entry.

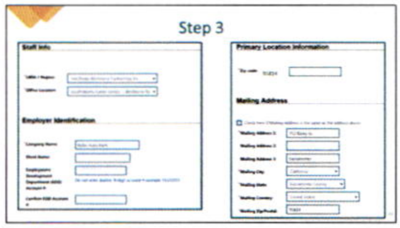





After choosing the Manual Entry option, we are brought to this ***Employer Identification*** screen.

The EDD Account Number, also known as the employer Tax ID #, is not a required field for Marketing Lead employers, so you may either enter the EDD Account Number if you **have it, or just select the "Continue" button.**

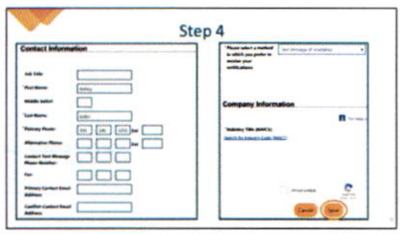





On the next page you will enter information about your Marketing Lead. First, select the appropriate **LWIA/Region** and **Office location** in the **Staff Info** section. Next, enter the **Company Name** in the **Employer Identification** section. Again, the EDD Account # is not a required field.

Next, enter the **Zip code of the employer's main, or primary, location. When you enter** the **Zip Code**, additional fields for the Street Address of the Primary Location will populate below. Then, continue by completing the **Mailing Address**. If the Mailing Address is the same as the Primary Location, use the check box to auto-fill the Mailing Address fields.



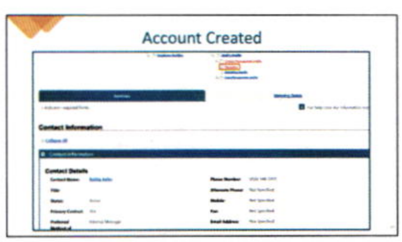



Next, complete the first three required fields in the **Contact Information** section. If you have additional information, you can enter it in the corresponding fields, but it is not required for a Marketing Lead.

Finally, choose the method in which the Marketing Lead prefers to receive notifications **from CalJOBS or staff. Typically, staff will select "Internal Message" when first creating** the Marketing Lead account. This can be always be updated. In addition, staff can now must associate the Industry Title (NAICS) for the company. Click the Search for Industry Code (NAICS) link to search and associate.

Finish the Recaptcha check box.
**Select "Save" when complete. You have now created a Marketing Lead.**

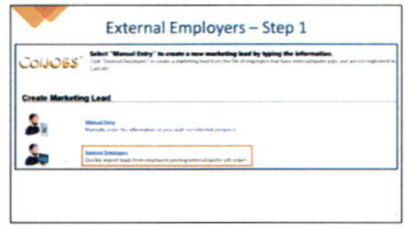





**After selecting "Save", the Marketing Lead from a manual entry is created.**

The system will automatically route you to the **Staff's Profile** folder, **Contact Management Profile** subfolder, **Summary** section, where information about your Marketing Lead will now appear.



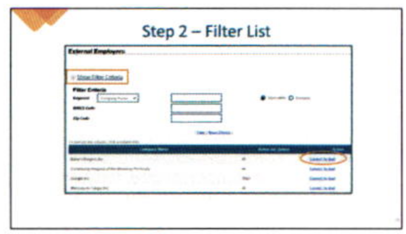



**Now let's go back and create** a Marketing Lead using the External Employers option. **External employers are those whose job postings have been "spidered" into** CalJOBS from other internet job posting sites.

Again, from the CRM group on the left navigation menu, select ***Create a Marketing Lead***. Then, select the ***External Employers*** link.

Select External Employers link to view list of Employers with spidered job orders.

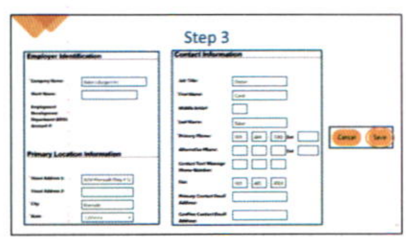





**This will take you to a list of all the "spidered" employers currently in CalJOBS. This list** can be sorted by **Company Name**, or by **Active Job Orders**. Or, we can expand the ***Show Filter Criteria*** link and filter the search. You can filter by keyword, industry code, **or the zip code of the employer's location.**

**After you've identified an employer you plan to contact, from the right hand side, under** the **Action** column, select the Convert to lead link.





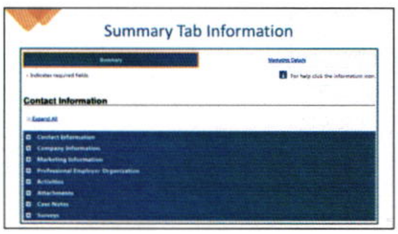

This will bring you to the same employer information entry screen that we saw when completing a Manual Entry. However, now most fields will be auto-populated with the company information the system has retrieved from the job order spidered into CalJOBS.

**Complete any additional required fields, then select the "Save" button.**


**After selecting "Save", the Marketing Lead from an external employer is created.**

The system will automatically route you to the **Staff's Profile** folder, **Contact Management Profile** subfolder, **Summary** section, where information about your Marketing Lead will now appear.

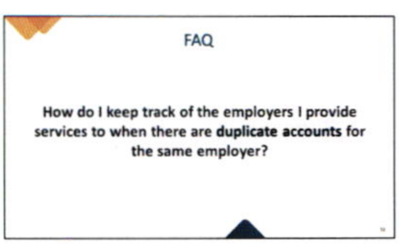





The **Summary** tab contains the following sections that are useful in the management of the Marketing Lead:

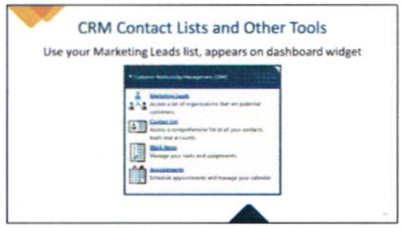
- **Contact Information** – Here you can edit contact and login information, including User Name
- **Company Information** – Where you can add Locations and Contacts, or View Account Type
- **Marketing Information** – Here you can view the Marketing Lead Owner (the staff person who created the Lead account and/orcurrently **manages the employer's** needs)
- **Professional Employer Organization** – Where you can Select a Professional Employer Organization to associate to the Lead
- **Activities** – Where you can view and add Work Items for the Lead (not to be confused with Employer Activity Codes, which is housed in a different section of the employer profile)
- **Attachments** – Here you can upload and associate important documents, for example, business license, with the account profile
- **Case Notes** – Where you can view existing and add new case notes
- **Surveys** – Which is not used by California






In our last FAQ, we mentioned that staff can create more than one Marketing Lead (or Recruiting Employer) account for employers. When this happens, it creates duplicate accounts which staff sometimes have difficulty managing.

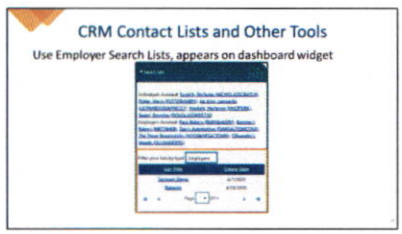





We would like to highlight three tools to keep track of the Marketing Lead accounts staff work with, despite the large number of duplicates.

First, staff can use the Marketing Leads list. This is a directory of the company and contact names of Marketing Lead employers created by staff. This list defaults to showing only the accounts for which you are the Lead Owner.





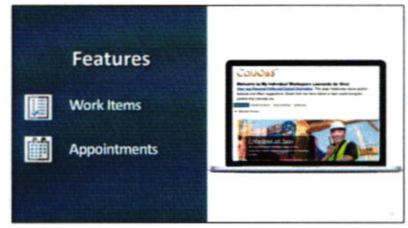

Second, staff can create an Employer Search List with the employer accounts they work **with. All you need is the employer's username, which is a unique identifier, to create a** new list or add them to an existing list. The list is easily accessible in the Saved Lists widget on the staff dashboard.




Lastly, staff can assign themselves as the employer case manager within the employer profile.

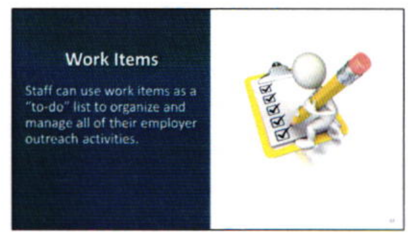
Please note the system allows more than one case manager to be assigned to an **employer account, whether it's for the same or different locations. Once assigned as** the case manager, you can access the list of all employers you are assigned as a case manager within the Manage Case Assignment left hand menu, Employer Case Assignment section, Employers View Case Load link.






**Next, let's take a look at the features of the CRM module and how they can benefit staff** in performing their job duties.





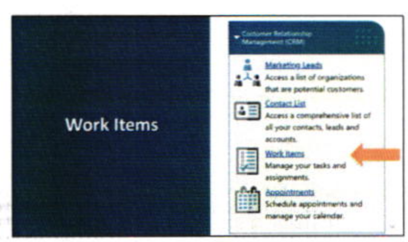

The first feature is the ability to create Work Items. A *Work Item* is a task that Business Services staff want to complete for a Marketing Lead employer. *Work Items* can be assigned (and re-assigned) to staff, and can be prioritized based on their importance.

For example, a manager from a field office can use the *Work Item* feature to assign one of their staff members to phone an employer regarding a potential job seeker referral. As another example, a staff who is working with a Marketing Lead might want to call the employer to invite them for a recruitment event that will be held in their office. Staff can assign themselves a *Work Item* and check it off when they complete the task.

So, the *Work Items* feature is basically a to-do list that allows staff to manage employer outreach.

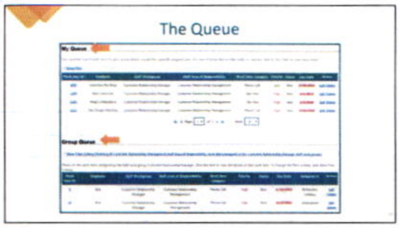
**Staff can use work items as a "to-do" list to organize and manage all of their their** employer outreach activities. When used in this way, it also provides a record of their daily and weekly work activities for managers to view, as needed.






The next sub-menu is **Work Items**. A work item is a task that Business Services staff want to complete for a Marketing Lead employer. Work items can be assigned, and re-assigned, to staff and can be prioritized based on importance.

**Staff can use work items as a "to-do" list to organize and manage all of their their** employer outreach activities. When used in this way, it also provides a record of their daily and weekly work activities for managers to view, as needed.



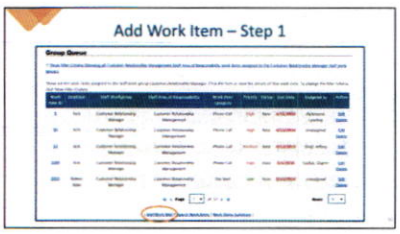

The **My Queue** section on top shows the work items assigned to you, if any.

The **Group Queue** section shows all the work items assigned to the entire CRM work group. There is only one CRM work group in CalJOBS. Everyone who is using the Work Items feature is in the same group.

You can filter this list using a select number of criteria:

- Work Item Category (Phone Call, Site Visit, Face-to-Face Meeting, etc.)
- LWIA Region
- Hide Already Assigned/Show Closed Work Items



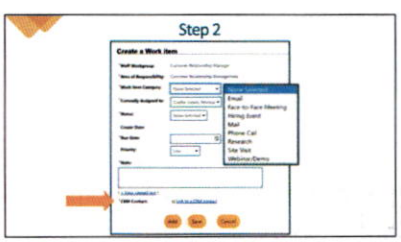



Below the Queues, there are three links:

Add Work Item – Select this link to create a new Work Item
Search Work Items – Select this link to search for Work Items using multiple search filters
Work Items Summary – Select this link to view a summary of work items for the whole state

**Let's select the** Add Work Item link.



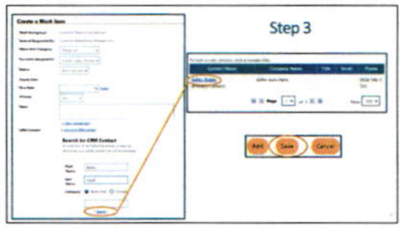



On this screen, staff with appropriate privileges can add a new work item for themselves, or assign a work item to another staff. First, select the **Work Item Category** from the drop-down.

The **Currently Assigned To** dropdown will only show names of those staff who have been designated as part of the CRM staff workgroup. Contact your MIS Administrator or CalJOBS SPOC if your name does not appear on this list.

Next, complete the **Status**, **Due Date**, **Priority**, and **Note** fields. Finally, click on Link to a CRM contact at the bottom to link a Marketing Lead to the work item.



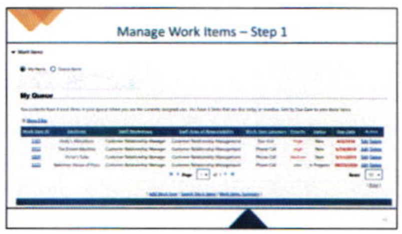



After selecting Link to a CRM contact, use the search options (First Name, Last Name, and Company) to link to the appropriate employer for this work item. After entering the search criteria, select the Search link. A new page will populate with the matching results at the bottom of the page in a table. Click on the Contact Name link of the correct Marketing Lead. The employer will now appear in the Employer Name and CRM Contact fields.

**Note: After linking a CRM Contact, the system will give you the option to "Generate a Case Note from Note". Select the checkbox if you would like to do this and a Case Note** will be added to the employer profile.

**Finally, select the "Save" button to finish creating the Work Item. After selecting "Save",** you will be directed to the Activities section of the Leads Summary tab, where your work item now populate.



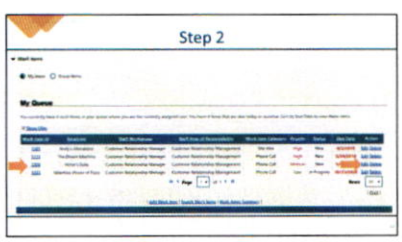



Now that we reviewed how to add a Work Item, **let's address how to manage a Work** Item.

When you login to CalJOBS, a message notification may pop up and show any Work Items that were created with a due date of today. To open the Work Item from the pop-up notification, simply click on the underlined number link.

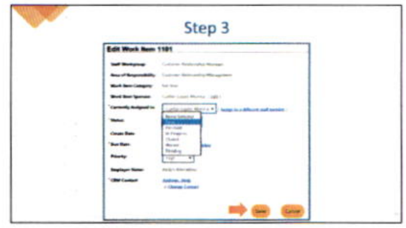
In addition, when staff log in, they will see the Work Items queue widget at the bottom of the staff dashboard. Finally, staff can also access their Work Items by using the CRM menu. We will access Work Items using the CRM menu.






**To select a work item and it's details from the queue, simply click** on the Work Item ID in the first column. Or, you can edit or delete the work item from this screen in the far **right "Action" column.**






On their own work items, staff can change the status from New to In Progress or Closed, and add Notes at the bottom.

**Select the "Save" button when you are done working on the Work Item. If you closed** the Work Item, it will be removed from your Queue.

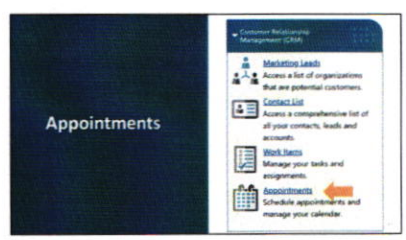



The next sub-menu is **Appointments.** Navigating to the left menu for CRM, select the fifth sub-menu: **Appointments**.

Staff may set **Appointments** for the Marketing Lead and employers they manage.

**Now it's a great time** to distinguish between the appointments feature and the events **calendar. The events calendar is where you'll see the events that are created for job** fairs and workshops and typically everyone can view the events calendar. The appointment calendar is only viewable by you and this is where you can schedule meetings with employers and/or job seekers.



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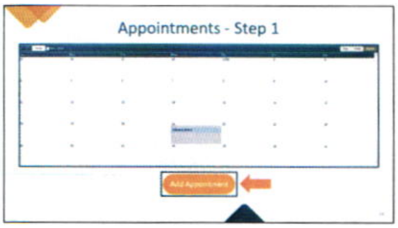
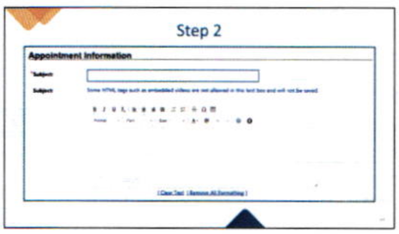


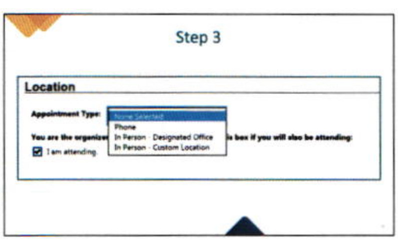

To add an appointment to your calendar, click on *Add Appointment* button from the appointment screen.

68




From here under the **Appointment Information** section, you would enter the subject of the appointment in the *Subject* field.

69

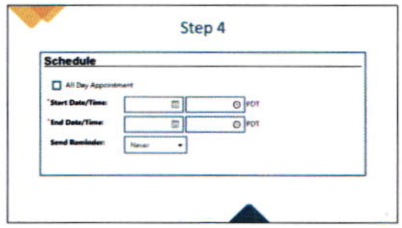



In the **Location** section select an *Appointment Type* from the drop-down list (Phone, In Person – Designated Office, or In Person – Custom Location). Depending on your selection this will appear on your screen for example,

- If *In Person – Designated Office* is selected, the *Workforce Region*, *Office Location*, and *Meeting Room* drop-down lists will appear.
- If *In Person – Custom Location* is selected, the *Custom Location* field will open in which staff can enter freeform text to describe the location.

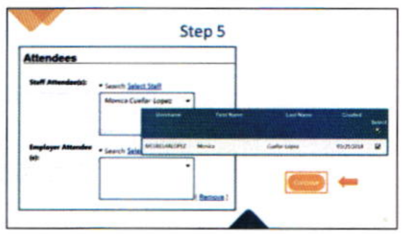
Then, staff can indicate if they plan to attend by selecting the *I am attending* checkbox.

70




In the **Schedule** section of the appointment page, staff should select the box if the appointment is an all-day event or if the appointment is not an all-day event, enter the *Start Date* and *Time* and the *End Date* and *Time*. To have the system send a reminder of the appointment, select an option from the *Send Reminder* drop-down list (the options are 1 – 4 days prior to the appointment).

71




Next, in the **Attendees** section of the appointment screen, staff can invite other staff members or employers to the appointment. For instance, you can invite staff attendee(s) by clicking the <u>select staff link</u> **[Animation]**. A Search screen will open; search for the staff. On the Search Results screen, select the checkbox(s) for the attendee(s) to be invited and click the **Continue** button. The system will close the Search Results screen and add the selected attendees to the Attendees list automatically.

To add employer attendees to your appointment, follow the same process as above for the staff attendees. Simply, click on the Select Employer(s) link. A Search screen will open; search for the staff. On the Search Results screen, select the checkbox(s) for the attendee(s) to be invited and click the **Continue** button. The system will close the Search Results screen and add the selected attendees to the Attendees list automatically.

72

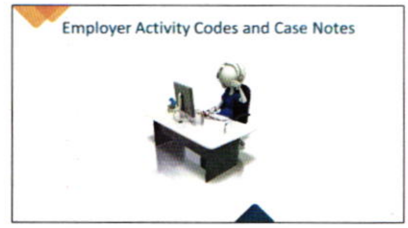

In the next section of the appointment screen, **Notification Options**, select the option to be used to notify the invitees of the appointment. The *Internal Message* option is checked as a default. If desired, select an additional notification method from the list displayed.

If staff wants to include this appointment on their personal calendar (i.e., Microsoft Outlook), click the Download checkbox.

The last section of the appointment screen is the ***Marketing*** section, select a *Client Type* from the drop-down list (New Prospect, Current Client, Former Client/Win Back, or Office/Networking/Training).

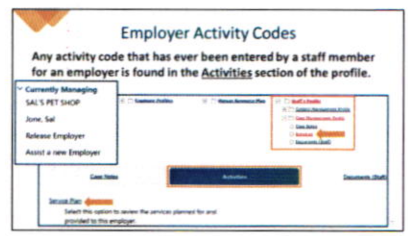
Click the **Save** button to save the appointment. The system will send the notification(s) to the invitee(s) automatically.

73




**Now that we have explored some of the features of the CRM module, let's demonstrate** how to record employer activity codes and case notes.

74



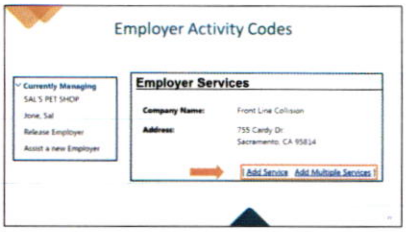

**[Animation Click]** Any activity code that has ever been entered by a staff member for an employer is found in the Activities section of the profile.

Within the Activities section, staff simply access the Services Plan **[Animation Click]** to view existing services and add additional ones.

75


**Now, let's now switch to the CalJOBS training site and learn how** to create a activity codes and case notes.

76




If applicable, here is where the existing activity codes will be listed for this employer. In our example, no services have been added.

To add a single service, select the Add Service link. To add multiple services, select the Add Multiple Services link. Here, we will add a single service.

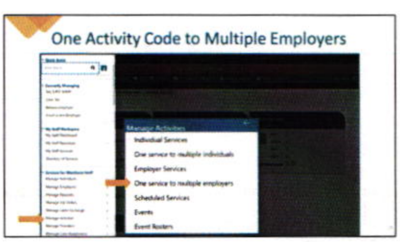



There are only four required fields when entering an Employer Activity Code: **Activity/Service**, **Region**, **Office**, and **Worksite Location**. To enter the Worksite Location, select the Find Worksite Location link. When selected, a popup will appear with the list of the company locations at the bottom. Select the appropriate location (the location you are providing this service to) and it will populate into the Worksite Location box.

In addition, if you enter a **Completion Code**, be sure to enter an **Actual End Date**.

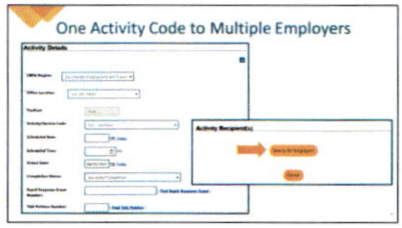
The other fields are optional, but can be helpful to collect important information on the **service provided. Once the four required fields are complete, select the "Save" button.**





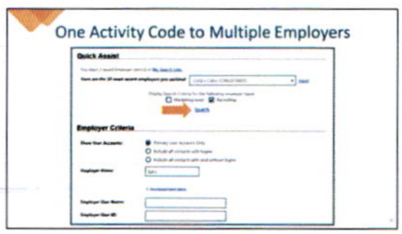

Within **Services for Workforce Staff**, **Manage Employers**, staff can create an activity for multiple employers at the same time by selecting **One Service to Multiple Employers**. This saves staff time in cases where they assist multiple employers in the same way. For example, if 10 registered employers in CalJOBS participate in a Local Area job fair, staff can document that all in one.





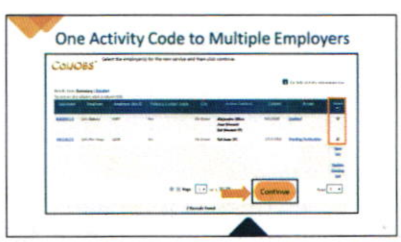

Complete the required fields including the **Activity Recipient(s)** section. Next, select **the "Search for Employers" button to choose the appropriate employers.**





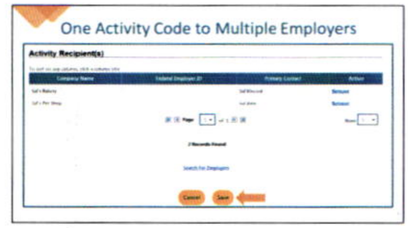

Use the search criteria to search for the employer(s). If you have a saved list of the employers, you can select them from the **Quick Assist** area, My Search Lists link. Otherwise, select the Search link.





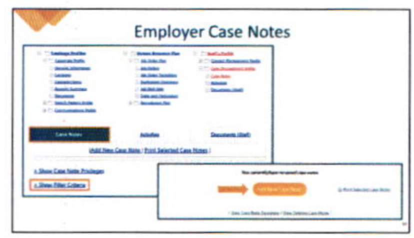

From the results, mark the box in the **Select column and then click the "Continue"** button.






Your chosen employer will now populate in the **Activity Recipient(s)** table. To add additional employers, select the Search for Employers link. Once you have added all **employers, select the "Save" button to finish. The activity will now be added to all of the employer's profiles.**



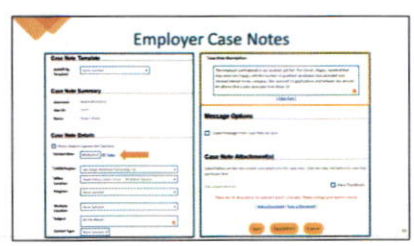



Case notes are another way to track services provided to employers. To create a case note on an employers account, under the **Staff's Profile** folder, Case Management Profile subfolder, select the Case Notes link.

This will bring you to an area with existing case notes for this employer, if any. If there are existing case notes, you can filter them using the Show Filter Criteria link.

To add a new case note either select the Add New Case Note **link or the "Add New Case Note" button.**

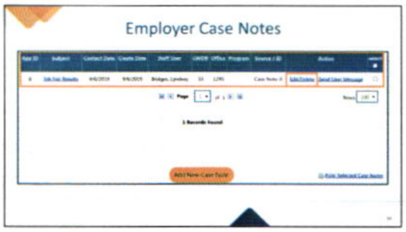





If you would like to create the case note using an existing template, select the appropriate template from the **Autofill by Template** dropdown. Otherwise, create a unique case note by completing the required fields, including the **Case Note Description** area.

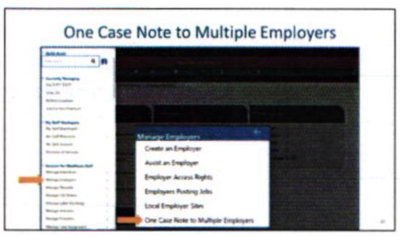
Note that there are fields that are not required, but may be completed for a more complete case note. For example, you may attach a document to this case note in the **Case Note Attachment(s)** section, but it is not required.

**Select the "Save" button when complete.**



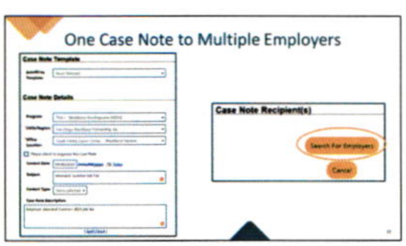

The completed case note will now populate in the **Case Notes** section, with the ability to Edit/Delete (depending on privileges) or email the case note from the **Action** column.

86



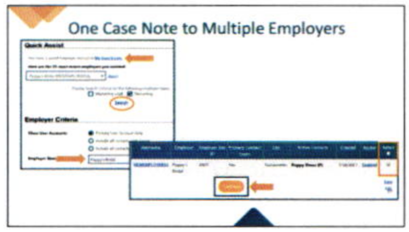

Within **Services for Workforce Staff**, **Manage Employers**, staff can create a case note for multiple employers at the same time by selecting **One Case Note to Multiple Employers**. This saves staff time in cases where they assist multiple employers in the same way. For example, if 10 registered employers in CalJOBS participate in a Local Area job fair, staff can document that all in one.

87



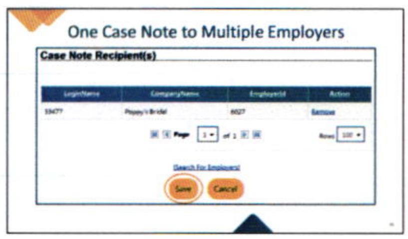

Complete the required fields including the **Case Note Description** section. Next, select **the "Search for Employers" button to choose the appropriate employers.**

88



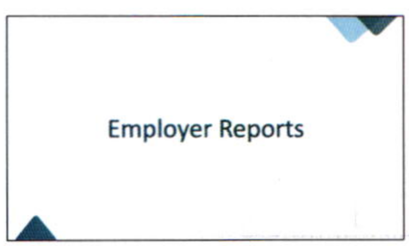

Use the search criteria to search for the employer(s). If you have a saved list of the employers, you can select them from the **Quick Assist** area, My Search Lists link. Otherwise, select the Search link. From the results, mark the box in the **Select** column **and then click the "Continue" button.**

89



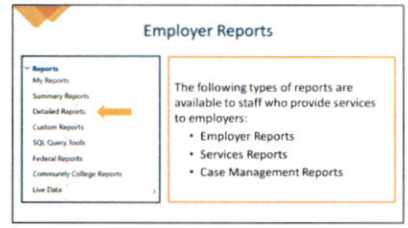

Your chosen employer will now populate in the **Case Note Recipient(s)** table. To add additional employers, select the Search for Employers link. Once you have added all **employers, select the "Save" button to finish. The case note will now be added to all of the employer's profile.**

90




**Now we'll explore** several reports available in CalJOBS that staff can set up and run to find data about employers.

91

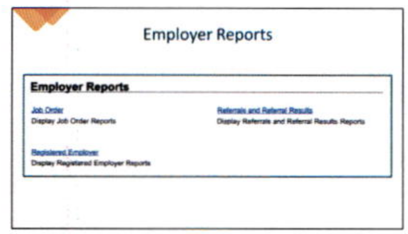



CalJOBS reports are housed in the **Reports** section of the left-hand navigation menu, or from the **Reports** ribbon within the **Directory of Services** tab located on the Staff Workspace. All of the reports that we will review in this training are housed under the **Detailed Reports** category.

We will highlight several reports in the following three categories:

- Employer Reports
- Services Reports
- Case Management Reports

92




The reports in the **Employer Reports** category include Job Order, Registered Employer, and Referrals and Referral Results. Each type of report is data on:

Job Order Reports - These reports document data from job orders created by preferred employers (employers who registered in the system) and external jobs (jobs that are "spidered" **in from other job banks). More data can be collected from internal job** orders, but some information can also be gleaned from external job orders.

Registered Employer Reports - These reports include a large number of sub-categories for filtering to see particular breakdowns (such as by Zip code, county, or number of employees). Most of these categories deal with questions that were asked during the two-page registration form for employers. In addition, these reports document an **employer's access rights, including throughout their history with the system and** currently. Lastly, these reports includes a Count of résumé Views, Individual Job Seeker Views, Open Job Orders and Summary Counts of Total Activity between specified dates (shown in this screenshot).

Referrals and Referral Results- These reports list job referrals by region, office, referring staff member, and referral type.

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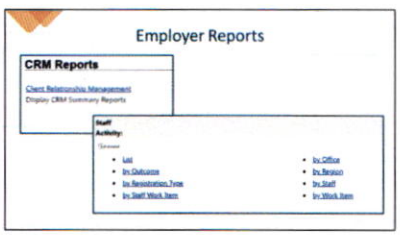
Note: We are not going to cover **Referrals and Referral Results** reports in this training.

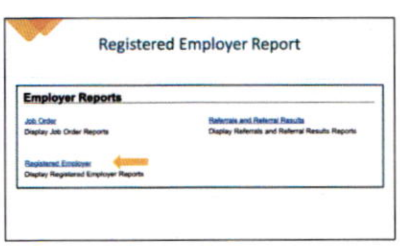
93


We will also review the **Services Provided Employers** report available in the **Services Reports section. Finally, we'll look at the Employer Case Notes** report located in the **Documentation** section of **Case Management Reports**.

94




95



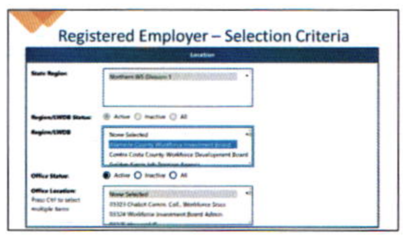

Let's begin with the **Registered Employer Report**.

96


After you select the **Registered Employer** link, you will see that there are a number of ways that you can configure your report. This will be the case with most reports in **CalJOBS. You can use the "?" icon, located in the top right**-hand side of the table, to see a description of each configuration and how it will present the data. I highly **recommend using the "?" bubble**.

If we run this report by **Zip Code**, for example, we will get a breakdown of registered employer in each zip code within.

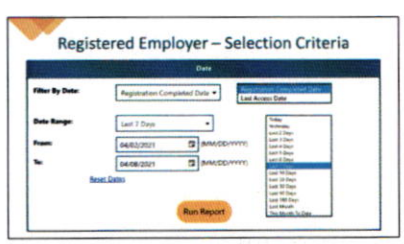
97




Next, you will choose the appropriate selection criteria, or filters, for your report. By selecting various filters you will narrow down the data that will be included in your report. We always like to say, less is more when it comes to selection criteria for your reports. That is, the fewer filters you choose, the more data you will get. Which means you will not want to choose a filter from every section of the report. Think about the data you are looking for and choose your filters to match.

One of the primary filters you are likely to choose is the location. Here you can select your **Region/LWDB**, for instance. This will give us a report with the registered employers in your area.

98




The other important filter is the **Date**. Here you will select a date range option from the dropdown menu, or you can enter a custom date into the **From** and **To** date fields. You will also select the **Filter By Date**, either **Registration Completed Date** or **Last Access Date**. Just note that these two filter by dates will yield very different results.

Once you configured all your selection criteria/filters, you are ready to run the report.

99

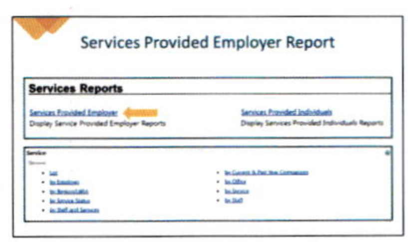

And here are the results. Since we selected the by Zip Code option, we see that the results are broken down by zip code. There are two new registered employers in my region and within my date range. I can select the **hyperlink** in the **Total** column order to get a list of these employers.

The selection criteria we used displays at the top of the report.

100


And here is the **list** for the employers in my search results.

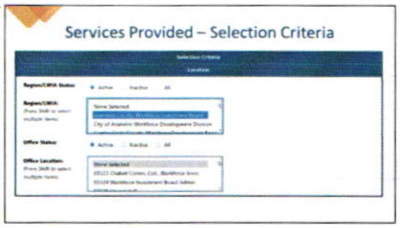
101




Within the **Services Reports** category, are the Services Provided Employer reports. These reports provide information about the services provided to employers by system staff. Staff can run these reports in a few ways, including by Employer or by Staff, to produce results of activity codes entered for employers.

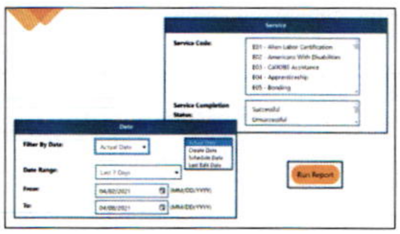
The example on this screen is a List report within Services Provided Employer reports. It provides a list of all employer activity codes entered by the specific staff member, within the week date range, in the designated LWIA/Region.

102




In the Selection Criteria, you can choose your **Region/LWIA** and **Office Location**.

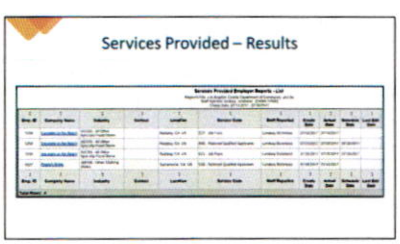





If you would like to filter your results by a specific activity code(s), you can choose the appropriate codes from the Service Code section.

As always, the **Filter By Date** option is very important, as it will determine where the dates are pulled from. After selecting a **Date Range**, you can run your report.

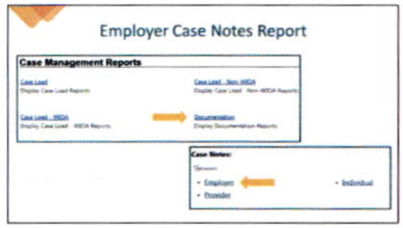





Within the **Services Reports** category, are the Services Provided Employer reports. These reports provide information about the services provided to employers by system staff. Staff can run these reports in a few ways, including by Employer or by Staff, to produce results of activity codes entered for employers.

The example on this screen is a List report within Services Provided Employer reports. It provides a list of all employer activity codes entered by the specific staff member, within the week date range, in the designated LWIA/Region.

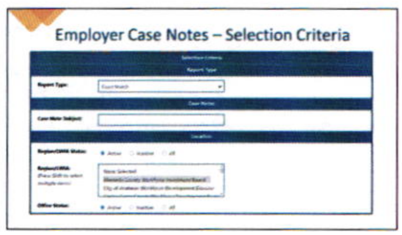





Within the **Case Management Reports** section, staff can utilize the Documentation reports to run case note reports. This report can be used, for example, if staff are entering case notes for an employer and need a list of all case notes they have completed.

The example on this screen is a result of a Case Notes, Employer report.

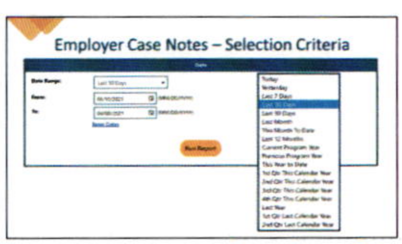





You can filter a by the subject line of the case note by entering a keyword into the **Case Note Subject Field**. You can also choose whether you want this to be an **Exact Match** or **Includes** from the **Report Type** field above.

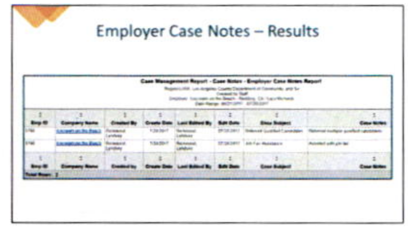
As always, your report can be filtered by your **Region/LWIA** and **Office Location**.





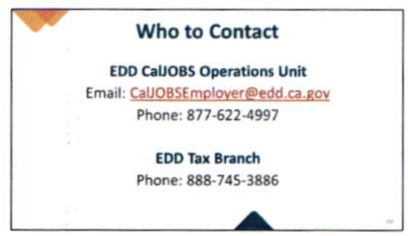

Once you select your **Date Range**, you can hit **Run Report**.






The results identify case notes created by staff for the specific employer (Icecream on the Beach), within the week date range, in the designated LWIA/Region.

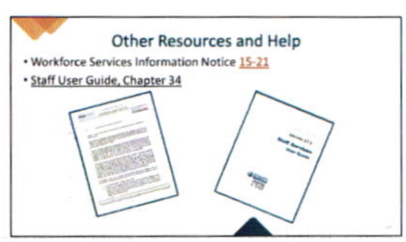





Who to Contact
EDD CalJOBS Operations Unit
Email: CalJOBSEmployer@edd.ca.gov
Phone: 877-622-4997

EDD Tax Branch
Phone: 888-745-3886






These resources will give further, detailed information about using the CRM module. Please reference the WSIN 15-21 for more detailed information and instructions on the CRM module in CalJOBS. In addition, refer to Chapter 34 of the Staff User Guide.

## Objectives Review

1. Introduced the CalJOBS labor exchange system and discussed the general layout and navigation of the site.
2. Described the Customer Relationship Management (CRM) module.
3. Demonstrated how to create a Marketing Lead employer account.
4. Showed how to add activity codes and case notes to a Marketing Lead account.
5. Demonstrated useful CRM reports.

The objectives for this webinar include the following:

1. **[Animation click]** Describe the Customer Relationship Management (CRM) module and identify the benefits of using the CalJOBS CRM module
2. **[Animation click]** Demonstrate how to create a Marketing Lead employer account
3. **[Animation click]** Show how to and add activity codes and case notes to a Marketing Lead account
4. **[Animation click]** Discuss additional features in the CRM module



**The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.**

EXHIBIT F

## Method of Payment

**Monthly payments on the Rapid Response Program shall be made provided that all of the following have been completed:**

1. All programmatic reports have been submitted to La Cooperativa by/on the 15th of every month to report the previous month's activity.
2. In the event that there are no costs for a month an invoice must still be submitted with zero dollars being requested.
3. Signed Invoices must be scanned and e-mailed to Salvador Diaz at sdiaz@lacooperativa.org and America Martinez at americam@lacooperativa.org and copied to Marina Tapia at mtapia@lacooperativa.org.
4. Invoices shall be submitted in the format provided by La Cooperativa without amendments, add-ons, or deletions. Invoices shall be submitted by the 15th of every month to report the previous month's activity and every invoice shall contain the following:

   a. A completed "Budgeted Expenditures" column
   b. A completed "Reversal of Prior Month's Accruals" Column "A"
   c. A completed "Cash Disbursement this Month" column "B"
   d. A completed "Accruals at Month End" column "C"
   e. A Completed "Cumulative Grant Expenditures"

5. The following columns are automatically formulated for you convenience:

   a. Total Expenditures this Month
   b. Percent of Budget
   c. Balance of Budget

6. If after review of invoice and spreadsheets and backup documentation, it is determined that some items are being charged erroneously or if it is found to contain any disallowed costs, a corrected invoice will be requested and justification will be communicated. **All invoices will only** be processed once La Cooperativa has received a corrected and acceptable invoice (if subcontractor is required to submit one).

7. If all conditions above have been met, subcontractor shall be paid within 10 business days (not counting weekends) starting from the day **a corrected and acceptable invoice has been received** by La Cooperativa (if Subcontractor is required to submit one). However, if subcontractor fails to submit a corrected invoice within a reasonable time period, payment on invoice will be made only for those undisputed costs.

# La Cooperativa -Rapid Respone Request Program for Reimbursement

| | | | |
|---|---|---|---|
| **Subgrantee:** | ______ | **Contract Amount $** | $0.00 |
| **Address:** | ______ | **Date** | ______ |
| **City/State/Zip:** | ______ | **Contract Number** | ______ |
| **Contact Person:** | ______ | **Contract Term** | ______ |
| **Phone/Fax:** | ______ | **This Billing Period** | ______ |

| | Budgeted Expenditures | A<br>Reversal of Prior Month's Accruals (enter positive $) | B<br>Cash Disbursements This Month | C<br>Accruals At Month End | Total Expenditures This Month | Cumulative Grant Expenditures | Percent of Budget | Balance of Budget |
|---|---|---|---|---|---|---|---|---|
| **ADMINISTRATION COSTS** | | | | | | | | |
| A Staff Salaries | | | | | $0.00 | | | $0.00 |
| B Staff Fringe Benefits | | | | | $0.00 | | | $0.00 |
| C Staff Travel | | | | | $0.00 | | | $0.00 |
| D Equipment | | | | | $0.00 | | | $0.00 |
| E Supplies | | | | | $0.00 | | | $0.00 |
| F Indirect Costs | | | | | $0.00 | | | $0.00 |
| G Operating Expenses | | | | | $0.00 | | | $0.00 |
| **TOTAL ADMINISTRATION** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | | **$0.00** |
| **PROGRAM COSTS** | | | | | | | | |
| H Staff Salaries | | | | | $0.00 | | | $0.00 |
| I Staff Fringe Benefits | | | | | $0.00 | | | $0.00 |
| J Staff Travel | | | | | $0.00 | | | $0.00 |
| K Operating Expenses | | | | | $0.00 | | | $0.00 |
| L Equipment | | | | | $0.00 | | | $0.00 |
| M Tuition | | | | | $0.00 | | | $0.00 |
| N Contractual | | | | | $0.00 | | | $0.00 |
| O Work Experience Wages & Fringe | | | | | $0.00 | | | $0.00 |
| P Supportive Services | | | | | $0.00 | | | $0.00 |
| Q Needs Related Payments | | | | | $0.00 | | | $0.00 |
| R On the Job Training (OJT) | | | | | $0.00 | | | $0.00 |
| **TOTAL PROGRAM COSTS** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | | **$0.00** |
| **TOTALS** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** | | **$0.00** |

| **Additional Reporting Elements** | **This Report Period** | **Total to Date** |
|---|---|---|
| Stand-In Costs * | ______ | ______ |

**Certification** I certify to the best of my knowledge and belief that this report is true within all respects and that all expenditures are made for the purpose of this program.

**Requested $ $0.00** **Print Name:** ______ **Signature:** ______ **Date:** ______

**Additional Instructions**

We require that financial reporting be on accrual basis. Use Column A if expenditures were accrued last month. These dollars must also appear in either Columns B or C depending on whether last month's accruals were disbursed or re-accrued.

* Stand-in costs are costs for the program paid for with non-federal costs resulting from an audit. Stand-in costs must come from the same year as the costs that they are proposed to replace and they must not cause a violation of the administrative or other cost limitations. These costs must be included in the appropriate expenditure reports if they will be used at a later time. Refer to 20 CFR 683.300(c)(4).