

Section 4

BSR Special Projects

Overview

Introduction

Workforce Innovation and Opportunity Act (WIOA) provides for a workforce system accessible to all job seekers and businesses. The Business Services Unit is an important piece of the workforce system. The Business Services Unit delivers solutions to:

- Address the needs of businesses in transition,
- Provide:
 - Business lifecycle (expansion and contraction),
 - Comprehensive business engagement and layoff aversion strategies, and
 - Activities designed to prevent or minimize the duration of unemployment,
- Convening, brokering, and facilitating the connections, networks and partners to ensure the ability to provide assistance to dislocated workers and their families such as legal aid and financial advice, and
- Strategic planning, data gathering and analysis designed to anticipate, prepare for, and manage economic change.

These services are considered Special Project and completed by the Business Service Representative (BSR). This chapter outlines the process for the Special Project BSR.

Referrals

The Special Project BSR relies on referrals from the Business Service Providers, also known as Business Consultants, and the America's Job Center of California (AJCC) staff. The AJCC staff identifies businesses who may need WIOA services and refers the businesses to the Special Project BSR, these are considered reverse referrals.

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Business Consultant

Introduction

The Business Consultant is Service Providers who were selected through the Request for Qualification (RFQ) process conducted by the Workforce Development Department. The Special Project Business Service Representative (BSR) is responsible for:

- Consulting (New In-Person Business visits),
 - Reviewing the intake forms (Smart Sheets),
 - Managing and monitoring the Business Consultants,
 - Monthly reporting,
 - Managing invoices,
 - Communicating with the Business Consultants, including follow-up communications, and
 - Executive Summary Report to the department and the Workforce Development Board (WDB).
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Consulting new business visit

Once a business is approved for Rapid Response Services, a discovery meeting is scheduled with the business, Business Consultant, and the Special Project BSR to identify the business needs and provide appropriate resources or connections. Part of the discovery is doing a comparison from prior year to current year ensuring businesses is perched for growth and healthy growing.

Intake forms

The Business Consultants complete intake forms for potential new businesses to receive Workforce Innovation and Opportunity Act (WIOA) Rapid Response Services. The Special Project BSR reviews the intake forms and determines if the business will benefit from the Rapid Response Services. If the business is not approved, other resources are provided.

Note: The Intake forms are saved in Smart Sheets project management website, which the Business Consultants are given access to for completion of the forms. The Smart Sheets dashboards must be created separately for each fiscal year for the Business Consultants.

Follow up business visit

Follow Up "In Person" business visit is a courtesy check-in with the new business to ensure we are meeting their needs or any additional assistance. This is also a great networking tool to keep a business in constant contact for Business Services and WDD.

Manage and monitor

The Special Project BSR, as the designated point of contact (POC), is responsible for managing and monitoring the Business Consultants to ensure they are providing the services they were hired to deliver. The POC is subject to Director approval.

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Business Consultant, Continued

Monthly reporting

The Business Consultants are required to create and submit a monthly report to the Special Project BSR. The report provides the following information:

- Date
- Business Name
- Status Update
- Contact Name/Number and Email
- Last Meeting Date
- Next Meeting Date
- City
- Date of Intake form
- Number of employees
- Industry
- Types of jobs that will be saved
- Salary Ranges
- Referral name

Note: The Business Consultant reports are used to create the Executive Summary Report for the WDB.

Quarterly 122 Layoff Aversion Report

The Business Consultants are required to submit quarterly reports (122 Report) to the Special Project BSR by the 10th of the month following the end of the quarter. Once the 122 Reports are collected from each consultant organization, the Special Project BSR reviews them to confirm each project is updated and submits to the Business Services Supervisor to be aggregated into a Master 122 and submitted to the State WDD Director and EDD Advisor. The funding report period is from April 1st to March 31st, so the quarters are as follows:

- Quarter 1 = Apr May Jun (due July 20th)
- Quarter 2 = Jul Aug Sep (due October 20th)
- Quarter 3 = Oct Nov Dec (due January 20th)
- Quarter 4 = Jan Feb Mar (due April 20th)

This is a cumulative report that is submitted quarterly by consultants to:

- Provide all layoff aversion activities; some may need a comment,
- Report the development, implementation, and completion of a business solution strategy(s) relating to and resulting in job retention (incumbent worker training, customized training, work sharing, etc.),
- Report the rapid re-employment (talent transfer) of affected workers,
- Provide documentation required and attach to the 122 report for completion of the business solution strategy for job retention and rapid re-employment. Documentation:
 - Can be a letter or email from the employer or self-attestation from staff, and
 - Is retained locally for audit purposes.

Note: Template and Instructions for the 122 report is located in the WDD-Share drive>Business Services>121 and 122 Forms folder.

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Business Consultant, Continued

Managing invoices

The Business Consultants submits invoices based on benchmarks. There are three (3) benchmarks the Special Project BSR reviews and verifies the services received. The three (3) benchmarks are:

- 1st benchmark – completion of the intake forms in Smart Sheets
 - 2nd benchmark – mid-service process or call employer for update
 - 3rd benchmark – completion of project, which includes:
 - Number of jobs saved or retained
 - Increase revenue
 - Decrease cost
 - Increase job growth
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Follow up communication

Follow up communication with new and existing businesses is extremely important. Communication is to ensure satisfaction and for keeping the relationship between all partners.

Executive Summary report

The Special Project BSR collects the monthly reports from the Business Consultants and creates an Executive Summary of all the providers into one report. The report is submitted to the Business Services Supervisor, WDD leadership, and the WDB.

Note: Template of the Executive Summary report is located in the Business Services shared folder under consultant documents.

Contracts

Introduction

This section outlines the contract process for promoting and selecting Business Consultants and workshops for the Workforce Development Department (WDD) to partner with for Rapid Response Services.

RFQ

The Request For Qualification (RFQ) is the competitive process used to select vendors (also known as Business Consultants) for assisting businesses with Rapid Response activities. The RFQ is also used when the Business Consultants or the Special Project Business Service Representative (BSR) want to plan for workshops.

The Special Project BSR assists in the development of contracts from RFQ's with WDD Administration Staff Analyst. The WDD Administration Staff Analyst must allow a minimum of 60 days for promoting and soliciting for the services needed for Rapid Response.

The competitive process to select vendors normally occurs every three (3) years with a potential of a two (2) year extension.

Scope of work

The Special Project BSR creates the scope of work for the potential vendors (Business Consultants). The scope of work includes, but not limited to the following:

- Identify prospective business process improvement consulting services candidates, subject to WDD's approval.
 - Coordinate a prospective candidate discovery meeting attended by the point of contact.
 - Complete intake forms and prepare a detailed prospective work plan, including outcomes, schedule, milestones, costs, and periodic performance reporting
 - Provide services pursuant to the Work Plan, but not limited to the following topics:
 - Innovation and Growth
 - Process Improvement
 - Quality Improvement
 - Supply Chain Development
 - Technology
 - Workforce Development
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Selection process

The WDD Administration Staff Analyst and Special Project BSR will follow the guidelines outlined in the Administration Handbook – Chapter 9/Contracts for the selection process.

Contract agreement

Once the selection process is completed, the Special Project BSR works with the WDD Administration Staff Analyst to develop the individual contract agreements for the approved Business Consultants.

Workshop

Introduction

Historically, Business Services conducts an average of 24 to 30 Workshops and 4 to 5 Webinars Planning in a Fiscal Year (FY). The Workshops and webinars are provided by the Business Consultants and/or other vendors obtained through the Request for Qualification (RFQ) process. The workshops and webinars consists of the following process:

- Research topics of interest (use past surveys and BSR feedback)
 - Create fliers
 - Booking locations
 - Manage speakers
 - Create registration page and links
 - Reminder calls/emails to registrants
 - 003/invoices
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Topics

Topics are identified through surveys, Business Service Representatives (BSR), and/or Business Consultants. Part of the process when selecting topics also includes the coordination of speakers.

Once topics are identified the information is entered into Eventbrite, which is a great tool for tracking and creating reports.

Eventbrite

Prior to entering information into Eventbrite, the following information must be identified and determined:

- Topic
- Calendar – date for the workshop or webinar will occur
- Name of speaker

Once the information is identified, the Special Project BSR will access the Eventbrite link and will:

- Create an Eventbrite page, and
- Generate an Eventbrite ticket (mandatory to generate)
 - Ticket start date is the date the information is being entered into Eventbrite
 - Ticket end date is the actual date of the event

Note: It is important to check and ensure the end date is the date of the event and not before. If it isn't the actual end date, the ticket will be closed and employers will not be able to register for an event.

Webinar

Webinars are the best marketing tool for gaining broader and deeper engagement with a targeted audience. A webinar is an online meeting that combines some form of educational presentation or training on the Internet.

The Business Consultants supply their own webinar platform and will provide the information to the Special Project BSR to include in the Eventbrite page.

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Workshop, Continued

Communication	After the workshops are generated in Eventbrite, the Special Project BSR will E-blast contacts and remain in constant communication, do reminder calls, and emails to registrants.
Workshop locations	<p>When a workshop has been identified and planning has begun, the Special Project BSR must determine if the workshop is going to be in person or online. For in-person workshop sessions, the Special Project BSR will work with organizations who will partner with them and allow WDD to utilize their location at no cost.</p> <p>Example: City of Upland allows WDD to use the Carnegie Hall for in-person workshops.</p>
Eventbrite ticket – order form	Great tool in Eventbrite is the “order form”. The order form allows the user to customize survey questions per business and specific questions related to type of industry, and specific information about the business (number of employees, positions, etc.). The Special Project BSR can pull reports based on the survey responses to create reports for the department.
Workshop set-up	<p>For In-person workshops, the Special Project BSR will be responsible for ensuring the set-up is completed. Included in the set-up, but not limited to:</p> <ul style="list-style-type: none">• Gathering promo items,• Developing fliers,• Putting packets together with the required material for the workshop, if applicable,• Reminder emails and calls to the registrants,• Present the BSR services orientation on the day of the workshop
Workshop orientation	The Workshop orientation is based on the Business Services flier, which is saved in the Business Service Share drive. The flyer is used to provide an overview of the services and is presented as an introduction during the workshop or webinar.
Promo items	The Special Project BSR works with the Business Service Technician (BST) to gather and order promo items for workshops and special events. When purchasing promo items, the BST and BSR will follow the Administration Handbook Fiscal Chapter regarding the 003 process.

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Workshop, Continued

Surveys

Surveys are important and a great tool for the Business Consultants and WDD. The Special Project BSR creates a Survey Monkey for each workshop and sends the Survey Monkey link to the registrants after each workshop has ended.

The Special Project BSR has to think of the following when using the Survey Monkey:

1. How do you ensure everyone completes the survey?
 - a. Explain the importance of the survey to businesses.
 - b. How the survey will be used.
 - c. Email reminders for businesses to complete survey.
 - d. Phone calls to request businesses complete the survey.
2. What questions are important to the WDB?

The BST will work with the Special Project BSR to create and send out the Survey Monkey link to businesses.

Flyers

Approved flyers for Business Services to utilize are saved in the Business Services Share Drive. The flyers will get updated whenever a workshop or event is taking place. Flyers are also uploaded and included in the Eventbrite invitation.

When creating new flyers and not using existing templates, flyer must be approved for County branding following the guidelines outlined in the Administration Handbook, Chapter Media.

Job Fairs

Introduction

Business Services team conduct and plan three (3) Regional Job Fair Events every year. Purpose for job fairs is partnerships, community input, and promoting marketing. The Special Project Business Service Representative (BSR) coordinates the planning of the events, which includes, but not limited to the following activities:

- Coordinate planning meeting
- Book location
- Handle and create registration for both job seekers and employers
- Follow up with partners
- Organize and purchase food and rentals
- Promote events through social platforms such as Eventbrite, Constant contact, and local partners
- Create flyer
- Donation letter
- Survey

Planning Meeting

The planning meetings process begins the day after an event has ended for the following year and continuous meetings until the day of the event. Part of the planning meeting is to go over the:

- Pros and Cons from last Job Fair.
- Partners who were missing and should be included for upcoming events.
- Gift card incentives for the Job Seekers.
- How do we attract more job seekers or employers?
- How was the location, time of the Job Fair and food?

The following members are invited to the Planning meeting for the events:

- Economic Development Agencies from represented cities from the county
- Regional partners
- Local Cities
- Chamber members

Location

The Special Project BSR scouts for new locations for upcoming events. Three (3) quotes are required and must be sent to fiscal along with selection and justification for the selection. When selecting a venue consider the following (this is not an all-inclusive list):

- What is the cost of the venue?
- Are there restrictions?
- How is the parking?
- What is the maximum capacity?
- Is the location accessible for disabled individuals?
- Does the location allow food?

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Job Fairs, Continued

**Location,
continued**

Once the selection is approved, the vendor is notified and creates the contract. Contract is forwarded to the Special Project BSR to ensure it is received and completed. Contract must be sent to County Counsel for approval. In addition to the contract, the vendor must provide the insurance for the facility, which County Counsel will review.

Reminder: Any purchases that includes location costs, must have the 003 completed and submitted. The Special Project BSR or BST will follow the guidelines outlined in the Administration Handbook Chapter – Fiscal for the 003 process.

Registration

There are two (2) formats used for Job Fair registration, they are:

- Constant Contact for employers, and
 - Eventbrite for job seekers.
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Follow up

Throughout the process, follow up conversations with partners and businesses are important. This is an opportunity to brainstorm with businesses and partners on how to create more interest; leveraging partnerships not only to promote job fairs but bring resources to the community.

**Food and
rentals**

Just like locations, the Special Project BSR must scout for food and rental equipment, if applicable. Must obtain three (3) quotes, submit to fiscal with justification for selection and complete the 003 process. Once the vendor is notified they were selected, the vendor will create and submit the contract to the Special Project BSR for review.

Contract will be sent to County Counsel for review, if applicable.

Flyer

The approved Job Fair flyer template is located in the Business Service share drive. The Special Project BSR will update the flyer with the appropriate dates and time for the Job Fair.

Swag bags

The Special Project BSR with the help of the BST put together swag bags to hand out during the Job Fair. The swag bags consists of promo items and are handed out to employers who attend the Job Fair.

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Job Fairs, Continued

Confirmation letter

Once businesses register for the Job Fair, the Special Project BSR sends a confirmation letter to the company informing them they have been approved to participate in the Job Fair. The letter includes the following information:

- Confirms the registration,
- Thanks them for their participation in the upcoming event,
- Request for gift card donations,
- Check-in time,
- How many representatives can attend the event, and
- What will be provided to the business (i.e. table, chair and linen)?

Note: Example of a confirmation letter is saved in the Business Service Share Drive.

Gift card donations

Businesses are asked to donate gift cards for the event to the contact person at the location. Job Fairs at the America's Job Center of California (AJCC), the cards are obtained and logged with the managers.

The Special Project BSR with the help of the BST sends out donation letters to Job Fair attendees. The donation letter explains the gift card is an offer to the attendee as a gift for calling us and letting WDD know that they received a job. The letter also addresses providing assistance if a job offer was not given

The AJCC Case managers issues the gift card to attendees who call with for job acceptance.

Note: Example of a donation letter is saved in the Business Service Share Drive.

Staff assignments

All BSRs are required to attend and participate in the Job Fairs; the Special Project BSR creates a staffing assignment document for volunteers to sign-up for the specific functions. Included in the specific functions are the times of when staff is needed and how many volunteers are needed for the Job Fair. Staff assignments are as follows:

- Set-up/Employer Registration
 - Employer Runners
 - Entrance Ticket Takers/Traffic Control
 - Quick Tap Survey Job Seekers
 - Floater
 - WDD staff to maintain Job seeker booth
 - WDD Job seeker Check-in
 - Breakdown
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Job Fairs, Continued

Job Fair Agenda

Job Fair Agenda is created for the day of the event for all attendees to have so they are aware of what is being presented.

Note: Example of an agenda is saved in the Business Service Share Drive.

Quick Tap survey

A Quick Tap survey collects demographic questions from the Job Seekers and is collected during the event. The survey consists of 10 questions and is used to develop the Job Fair outcomes.

Opening remarks

On the day of the event, the Special Project BSR begins the Job Fair with opening remarks. The opening remarks include the following:

- Welcome employers and partners,
 - State who the partners are,
 - Number of employers attending,
 - Estimated number of available jobs,
 - Types of jobs, and
 - Thanking everyone who assisted with putting the Job Fair together, including the volunteers.
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Job Fair report

At the end of the Job Fair, the Special Project BSR gathers all the information from the surveys and registration to develop a “Summary of Accomplishments” report. The report is shared with the:

- Business Services Supervisor,
- AJCC Managers and Supervisor,
- WDD Administration, and
- WDB

Note: The Job Fair Summary of Accomplishments report is saved in the Business Service Share Drive.

Special Event Planning

Introduction

Business Services team participates in special events to promote workforce related services, build stronger partnerships and linkages, and expand business contacts and relationships. There are three (3) special events that occur throughout the county each year, they are:

- State of the County (SOC)
 - Manufacturing Council of Inland Empire (MCIE)
 - Women in Manufacturing
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State of the County

The Regional Business Summit/State of the County is a dynamic event that attracts more than 1,000 industry professionals representing more than 300 organizations within the County of San Bernardino. This is an excellent collaboration with the most influential business owners, presidents, CEO and other decision makers in both the public and private sectors.

Opportunities to learn from local and global industry leaders across various disciplines about the importance of creating strong partnerships, leveraging resources and developing a workforce for the future.

The State of the County event occurs once a year at the beginning of the year. The Special Project Business Service Representative (BSR) is part of the planning committee.

MCIE

The Summit brings together manufacturers throughout Southern California and even national and international locations to demonstrate support for the industry and to share what the latest trends, challenges and solutions are for the manufacturing industry.

The Special Project BSR is responsible for identifying and showcasing a vendor for the “What is made in the Inland Empire” booth for the MCIE event. The Special Project BSR is also involved in the planning committee for the MCIE event and will:

- Contact local makers to show what they make, and
 - Help promote the event.
-

Women in Manufacturing

Women are largely underrepresented in the manufacturing industry, at all levels!

The goal of this event is to bring women together to support, encourage, empower, and break the stereotype of this being a male dominated industry. There are over 600,000 good paying manufacturing jobs unfilled in the USA and that number continues to climb, we need to inspire our makers and women interested in those career pathways.

Resources

Intro

Special projects utilizes multiple platforms to perform business outreach, workshop registration and customer surveys. This section includes information about the various resources the Special Project Business Service Representative (BSR) uses for performing his/her job duties.

Platforms

This is a list of the platforms used by the Special Project BSR:

- [Eventbrite.com](https://www.eventbrite.com) – used for business workshops and America’s Job Center of California job seeker registration
 - [Constant Contact.com](https://www.constantcontact.com) – Promote services and register employers for job fairs
 - [Survey Monkey.com](https://www.surveymonkey.com) – used for customer feedback for workshops and job fairs
 - [Smart Sheets](#) – Business Consultants have access to the Intake forms needed to approve for businesses
 - [Econovue.com](https://www.econovue.com) – used to pull business information for business visits and outreach
 - [Quick Tap Survey](#) – used to gather demographic information from job seekers
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Contacts

The Special Project BSR must establish relationships and create a contact list. Contacts are very important for networking with business, chambers, and other government agencies.
