





WAGE\$

Wisconsin Apprenticeship Growth and Expansion Strategies

Employer Outreach Reporting Guide Using JCW Business

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Use of JCW Business for the WAGE\$ Grant

This guide provides information about documenting on JCW Business employer outreach activities for Wisconsin Apprenticeship Growth and Expansion Strategies (WAGE\$) grant metrics. WAGE\$ is a federally-funded grant through the US Department of Labor. The Bureau of Apprenticeship Standards (BAS) oversees implementation and distribution of the funds. A portion of grant funds is passed through to the workforce development boards (hereafter referred to as "boards"), as subgrantees, to provide additional local employer outreach and strategic activities that directly support expansion of Registered Apprenticeship in the occupations commonly referred to as "WAGE\$ occupations."

Introduction

Specifically, the purpose of funding employer outreach activities through the WAGE\$ grant is to increase - statewide - the number of apprenticeship sponsors, apprenticeship programs, and apprentices in the WAGE\$ occupations, with an emphasis on increasing the number of apprentices from underrepresented populations.

JCW Business is the reporting platform for the State of Wisconsin Job Service.

- Employers use the platform to post vacant jobs;
- Job seekers use the platform to search and apply for jobs, upload searchable resumes, etc.; and
- Business Services Teams use the platform to record employer outreach and contacts.

Beginning July 1, 2018, JCW Business is the platform being used to report employer outreach related to the WAGE\$ grant metric of a minimum of 3,000 outreach activities.

Apprenticeship liaisons (board staff and/or contracted designees) and apprenticeship training representatives (ATRs) document their employer outreach activities for reporting metrics.

An entry qualified to be counted towards metrics will meet the requirements indicated in this guide. Liaison supervisors are responsible for ensuring that entries made by boards' reporters meet expectations. The ATR supervisor is responsible for ensuring that entries made by ATR reporters meet expectations.

Who can report

Reporters may be the apprenticeship liaisons, other board staff members or board designees identified by the liaison supervisor, ATRs, or BAS grant management staff. This guide will use the term "reporter" for any of these categories. All reporters must have access to JCW Business in order to make entries.

Each board's liaison supervisor will work with the WAGE\$ grant manager to identify which board staff members (and/or other designees) will enter employer outreach on behalf of the board. The liaison supervisor will notify the grant manager promptly if a new board reporter will make entries for the grant and/or if a previously designated individual will no longer make entries. The ATR supervisor will notify the grant manager promptly if a new ATR reporter will make entries or if an existing reporter will no longer enter grant outreach.

If the new reporter needs to gain access to JCW Business, the grant manager will coordinate access.

Liaison supervisors and the ATR supervisor are responsible for ensuring that all reporters (respectively) are properly trained in reporting employer outreach. BAS is responsible for ensuring that the WAGE\$ Employer Outreach Reporting Guide is updated as needed and available for training reporters. DET is responsible for arranging reporter access to JCW Business and the training portal, as appropriate and within policy.

Liaison and ATR supervisors may contact the grant manager if additional training is needed.

Filing deadlines



Employer outreach entries are due monthly on the 15th of the month following the reporting month unless the 15th falls on a weekend or holiday. In these cases, the entries are due the first business day following the 15th. Reporters may report activity at any time in the reporting period up until the deadline has passed.

What to report

Each workforce development board is responsible for providing a minimum of five qualifying entries each month. Apprenticeship Training Representatives (ATRs) follow the guidance of their supervisor; ATRs' activities do not count towards the boards' monthly tally but do count towards the grant metric.

Boards and ATRs are strongly encouraged to report <u>all</u> WAGE\$ outreach activities that will count towards the 3,000 outreach activities metric and not limit reporting to the required minimum of five per month. All qualifying entries (including those in excess of five per month) are tallied, attributed to the board or BAS district that conducted the outreach, and counted towards the 3,000 metric.

Some employer outreach does not count towards the metric, such as follow-up to previous meetings. (More details on what counts and what doesn't is in later sections of this guide.) It is the boards' and ATRs' choice to report only the WAGE\$ outreach that will contribute to the metric <u>or to also include</u> outreach that does not contribute to the metric. By reporting the outreach that does not count towards the metric, the reporter contributes to the record of the timeline and topics discussed, including those that lead up to an employer's commitment as a sponsor in specific WAGE\$ occupations. This information can be useful to others who conduct outreach or those who want to identify promising or best practices. Missing documentation can lead to miscommunication, duplicated requests for meetings, repeating messages already provided, and overlooking great success stories.

Requirements of a qualifying entry

This specific metric measures meaningful face-to-face contact with employers for the purpose of exchanging information specific to that employer. It does not refer to email, letters, or phone calls where conversation is limited or one-way. It does not refer to group presentations (e.g., at a conference, to a civic organization.) Those activities should be reported in the quarterly narrative report if considered noteworthy. However, when a group presentation results in a discussion with an individual employer - whether after the presentation, during a break, or after an exchange of business cards - generally, it will count if entered into JCW and linked to the individual employer.

The following is an overview of the elements of a solid, qualifying entry. Details are found in later sections, especially the step-by-step process section.



- A. The WAGE\$ box is checked.
- B. The service name matches the type of contact
- C. The comments box includes all of the required items:
 - key phrases if the service is a continuing service (more on this later)
 - name(s) and title(s) of RA representative providing RA information (e.g., liaison, ATR, technical college apprenticeship rep)
 - name(s) and title(s) of the contact(s) at the company and other attendees if important
 - RA topic(s) discussed (four specific topics)

- employer needs, challenges, concerns, decisions, etc. Also any special circumstances, notes, etc.
- next steps

It is assumed that all entries reflect face-to-face meetings with an individual employer. In rare circumstances a virtual meeting (e.g., Skype call, conference call, lengthy phone call) may qualify in lieu of face-to-face when the greater benefit is to the employer or it is overwhelmingly logical.

Examples:

- If inclement weather would make travel dangerous or difficult and the virtual meeting or phone call is the best alternative to canceling or rescheduling the meeting.
- If the reporter and employer have already established a good working relationship and the location of the employer makes it overwhelmingly illogical for the reporter to physically travel to and a virtual meeting or phone call would be equally effective due to the already established strong relationship.
- If the employer specifically requests a virtual meeting or phone call because it is more convenient for the employer.

In any case where the outreach was not in-person, the reporter is expected to explain the format and circumstances.

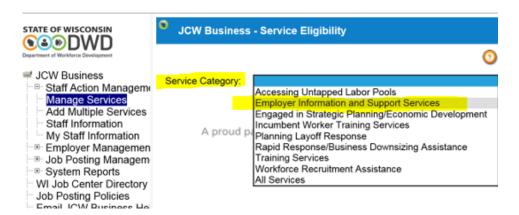
The abbreviated process to document outreach

(A step-by-step with pictures is at the end of this guide.)

- 1. Log in to JCW Business
- 2. Go to Staff Action Management
- 3. Select Manage Services
- 4. Search for the site
- 5. Select the site
- 6. Review the list of services already entered
- 7. Select Add Service
- 8. Select the service category (*Employer Information and Support Services*)
- 9. Select the service name (Contact Employer Continuing or Contact Employer Initial)
- 10. Enter and record the service

Service categories vs. service names

For WAGE\$, all employer outreach entries will be placed in the service category called *Employer Information and Support Services*.



Within this service category, there are subcategories, referred to as "service names." Only two service names are relevant to WAGE\$ reporting.

- Contact Employer Continuing
- Contact Employer Initial



Overview of service names

Employer outreach may be either "initial" or "continuing." WAGE\$ guidance is slightly altered from JCW Business guidance regarding use of service names but remains consistent with the intent of JCW Business.

Service Category	JCW Service	WAGE\$ Definition
	Name	
Employer Information	Contact Employer -	Continuing or follow-up contact to engage employer in discussion
and Support Services	Continuing	about at least one of the four apprenticeship topics. This entry
		assumes that Contact Employer - Initial service has already been
		entered.
Employer Information	Contact Employer -	Initial face-to-face meeting with an employer to discuss at least one
and Support Services	Initial	of the four apprenticeship topics.

Choosing a service name

- Initial = first face-to-face visit to an employer and/or sponsor for WAGE\$
 reporting purposes. This meeting must be face-to-face and specific to
 the employer (not a group meeting or presentation.)
- Continuing = generally required to be face-to-face with very few exceptions.
 Falls into one of three categories:
 - "Repeat"
 - previously reported company and contact for WAGE\$. The contact
 is already aware of Registered Apprenticeship. This could be a
 follow-up call to complete sponsorship paperwork, provide
 additional information, etc. The information adds to the existing
 timeline and documentation but is not required to be entered.
 - "New contact"
 - a new contact at a previously reported company. The idea of this
 type of entry is that the specific contact has not heard "the
 apprenticeship story" and by hearing it, the employer may move
 closer to becoming a sponsor, starting a new apprenticeship
 program, or increasing the number of apprenticeship contracts.
 - "New WAGE\$ occupation"



a meeting <u>scheduled specifically</u> to discuss a <u>newly or soon-to-be</u> <u>available</u> WAGE\$ occupation that the reporter thinks is especially relevant to the <u>employer/sponsor that has already been counted in</u> <u>the metric</u>. This is a newly allowed type of outreach to count towards the metrics due to the importance of updating employers with information about newly released occupations. The occupation(s) must be specified in the comments.

Service name	When it applies	If it counts in the metric
Contact Employer - Initial	For first time visit to employer	Contributes to the count (metric)
Contact Employer - Continuing	Meeting with previously reported employer, same contact	Does not contribute to the count
Contact Employer - Continuing	Meeting with a previously reported employer but a new contact person	Contributes to the count only if the first words of the comment are "New contact".
Contact Employer - Continuing	Meeting with a previously reported employer, but the meeting is set up specifically to discuss a newly available WAGE\$ occupation	Contributes to the count only if the first words of the comment are "New WAGE\$ occupation" and provides the occupation

Choosing service dates

JCW Business provides four places to input dates. WAGE\$ reporting requirements are different than JCW Business's requirements. It is important that reporters understand that WAGE\$ outreach reports are generated using **only one** of the four possible dates – <u>Service Actual</u> <u>Closed Date</u>. To be counted as outreach, the entry must have the date of the activity reported as the Service Actual Closed Date.



Comments



Comments are to follow a protocol and are to include all of the following information, *in the* same order as appears below.

- 1. If it is a continuing service, "Repeat", "New contact", or "New WAGE\$ occupation" as the first words. If it is an initial service, no introductory phrase is required.
- 2. Name(s) & title(s) of people organizing the meeting/presenting the RA information (liaison, ATR, tech college rep, etc.)
- 3. Name and title of the contact at the company
- 4. RA topic(s) discussed: (enter all that apply)
 - a. RA in general
 - b. WAGE\$ (include specific industry and/or occupations)
 - c. Youth Apprenticeship (any apprenticeship occupation)
 - d. pre-apprenticeship (specifically as a solution to employer's hiring needs <u>related to</u> <u>apprenticeship occupations</u> and with the intention of contributing to the number of apprentices)

- 5. Employer needs, challenges, concerns, decisions, etc.
- 6. Next steps: follow-up referral needed or done with ATR, YA, etc.; who will make the next contact and when; etc.

Examples of comments

Initial:

Comments:

Liaison Foster and ATR Grant jointly met with Angel Jones, owner. Discussed RA in general, Advanced Manufacturing, and possibility of IT apprenticeships. Owner is very interested b/c is in process of large expansion and automation. Set up a meeting with the HR lead, Avery. Meeting is set for June 2018. We left business cards and print materials

Text Limit: 2000 | Text Entered: 347

Continuing - repeat:

Comments:

Repeat: Liaison Loggins follow-up visit with owner, Mr. Messina. Interested in expanding his YA sponsorship to RA Mechatronics. Wants to get YA completer (graduate) hired before summer starts and in RI by fall; also wants to start another YA in pipeline. I gave a basic timeline. I will schedule a meeting with YA coordinator, school counselor, Mr. Messina, YA completer, and ATR. Aim for two weeks.

Text Limit: 2000 | Text Entered: 399

Continuing – new contact:

Comments:

New contact: Liaison Starsky and BTC app coord Hutch met with HR manager Elaine Rozvelt. Discussed YA and pre-apprenticeship in adv mfg. I gave Rozvelt the YA coord info and will follow with YA coord. Discussed pre-apprenticeship certification process. Hutch and Rozvelt will prep app and submit before Sept's advisory council meeting. Rozvelt has ATR Hoppson's business card. I'll hand off to Hoppson now.

Text Limit: 2000 | Text Entered: 406

Continuing – new WAGE\$ occupation:

Comments:

New WAGE\$ occupation: ATR Grant met with new facility manager, Regina Ford. Discussed IT Service Desk Technician and Help Desk. Has two IT staff who could serve as apprentice supervisors. Needs to hire three IT staff by end of quarter. I left Job Books and Ex A's. Scheduled phone call for next Thursday. I'll call her.

Text Limit: 2000 | Text Entered: 319

Step-by-step process for adding a service (with pictures)

1. Log in to JCW Business





2. Go to Staff Action Management



3. Select Manage Services



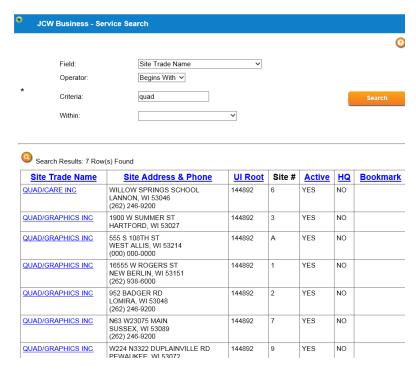
- 4. Search for the employer and site
 - a. Enter criteria

Field: Site Trade NameOperator: (your choice)

Criteria: (according to your operator choice)



- b. Select Search
- 5. Select the site (not just the employer but the correct site) by clicking on the linked name. In this example (Quad/Graphics) there are many sites. Clicking on the name of the specific site opens the record of services documented for that specific site and opens the option for adding a service.



If a company's headquarters site is coded as such, it will show up in the column HQ.



Search Results: 2 Row(s) Found						
Site Trade Name	Site Address & Phone	UI Root	Site #	Active	HQ	<u>Bookmark</u>
DESIGN TRAIN, LLC	415 TUNNEL DRIVE OREGON, WI 54943 (920) 920-9200	970583		YES	NO	
DESIGN TRAIN, LLC	514 LOCOMOTION TRAIL BERLIN, WI 44560 (920) 920-9200	970583		YES	YES	
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JCW Business has a bookmark option to save time finding employer sites by displaying a ribbon in the Bookmark column. If you would like to bookmark a site to make it easier to find later, you may do so by following the instructions in the last section of this guide.

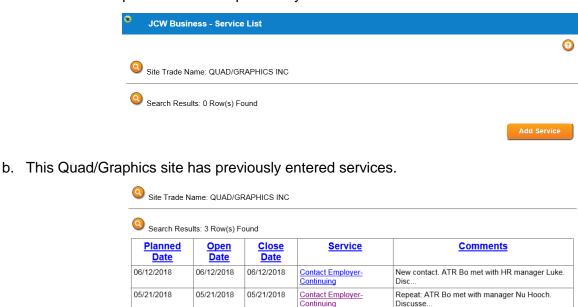
- Review the list of services already recorded for that site. Look at the two examples below.
 Note that the location address disappears. You should make sure that you are viewing services for the proper site.
 - a. This Quad/Graphics site has no previously entered services.

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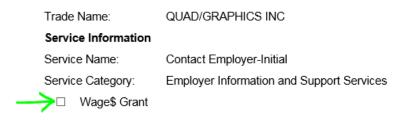
Contact Employer-Initial

Add Service

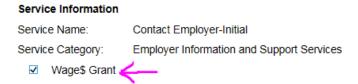
Liaison Turner met with manager Nu Hooch.

Discusse

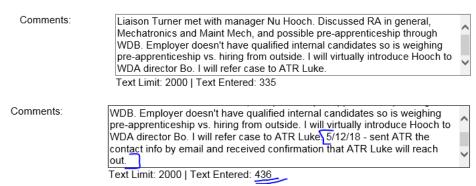
If there are services already entered but this is <u>your</u> first visit with the employer, it might still be considered *Contact Employer – Initial* as long as none of the previously entered services were marked as WAGE\$. Remember that many non-RA staff use JCW Business. You would need to open each previous service (dated after 10/1/15 because this was the first date of WAGE\$) and see if WAGE\$ was checked for any of them. To see details of the service, select the hyperlinked service name of the service you want to view. If no services had the WAGE\$ box checked, you can document your service as initial. (Don't change anything in someone else's service, though.)



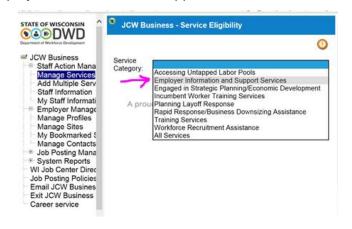
If WAGE\$ was checked for any of the services, you would need to read the comments and determine which *Contact Employer – Continuing* category is most appropriate. (See the section on service names if you want a review.)



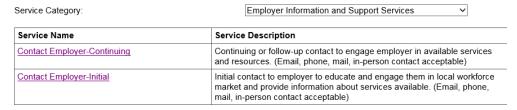
7. Select Add Service. Your outreach will be documented through Add Service. (Follow-up activity to an already entered service may be added to the end of that already-entered service and does not count as outreach. Follow-up activity is not required for WAGE\$ reporting. If you choose to enter follow-up activity, do NOT change the Service Actual Closed Date!) See the example below where the reporter updated a previously entered service by adding to the relevant comment to record that follow-up was done. This example shows an update and is not considered an outreach activity.



8. Select the service category - Select Employer Information and Support Services



 Select the service name – Select Contact Employer – Continuing or Contact Employer – Initial

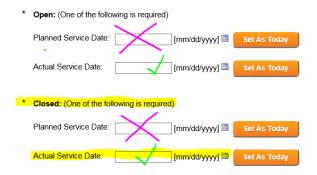


10. Enter and record the service

a. Check the WAGE\$ box.

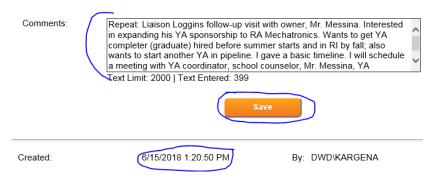


b. Select the dates. JCW Business requires that you select at least one of the "open" options and one of the "closed" options. <u>For our reporting purposes</u>, <u>you must mark the Actual Service Closed Date as the date of the outreach activity</u>. This is the only important date for WAGE\$ reporting; it is the date that that reports will be generated from.



- c. Enter your comments using the protocol. In conjunction with the WAGE\$ box, the contents of the comments box determine if this is a qualifying entry. See the section, Requirements of a Qualifying Entry.
- d. Save

The system will timestamp your entry.

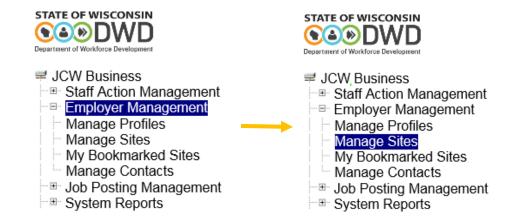


End of step-by-step process for adding a service

Step-by-step instructions for bookmarking an employer's site

To make site identification and selection easier in the future, you may bookmark a site.

1. Select Employer Management then Manage Sites



2. Search for the company

Field:	Profile Trade Name	~
Operator:	Begins With ✓	
Criteria:	quad/gra ×	

3. Select the company



After the company has been selected, all of the sites that someone has entered into JCW Business will be listed.



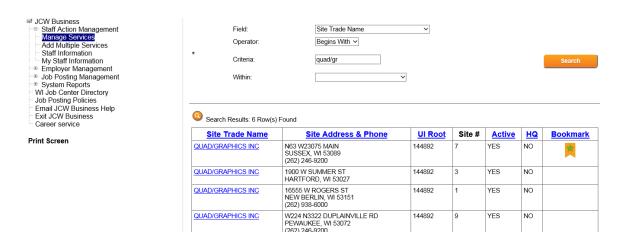
4. Select the site that you want to bookmark

5. Select the bookmark icon



When bookmarked, the star will turn green. Select it again to remove the bookmark.

When you go into Manage Services and the select the employer the next time, the site will be bookmarked and easy for you to identify.



End of this guide