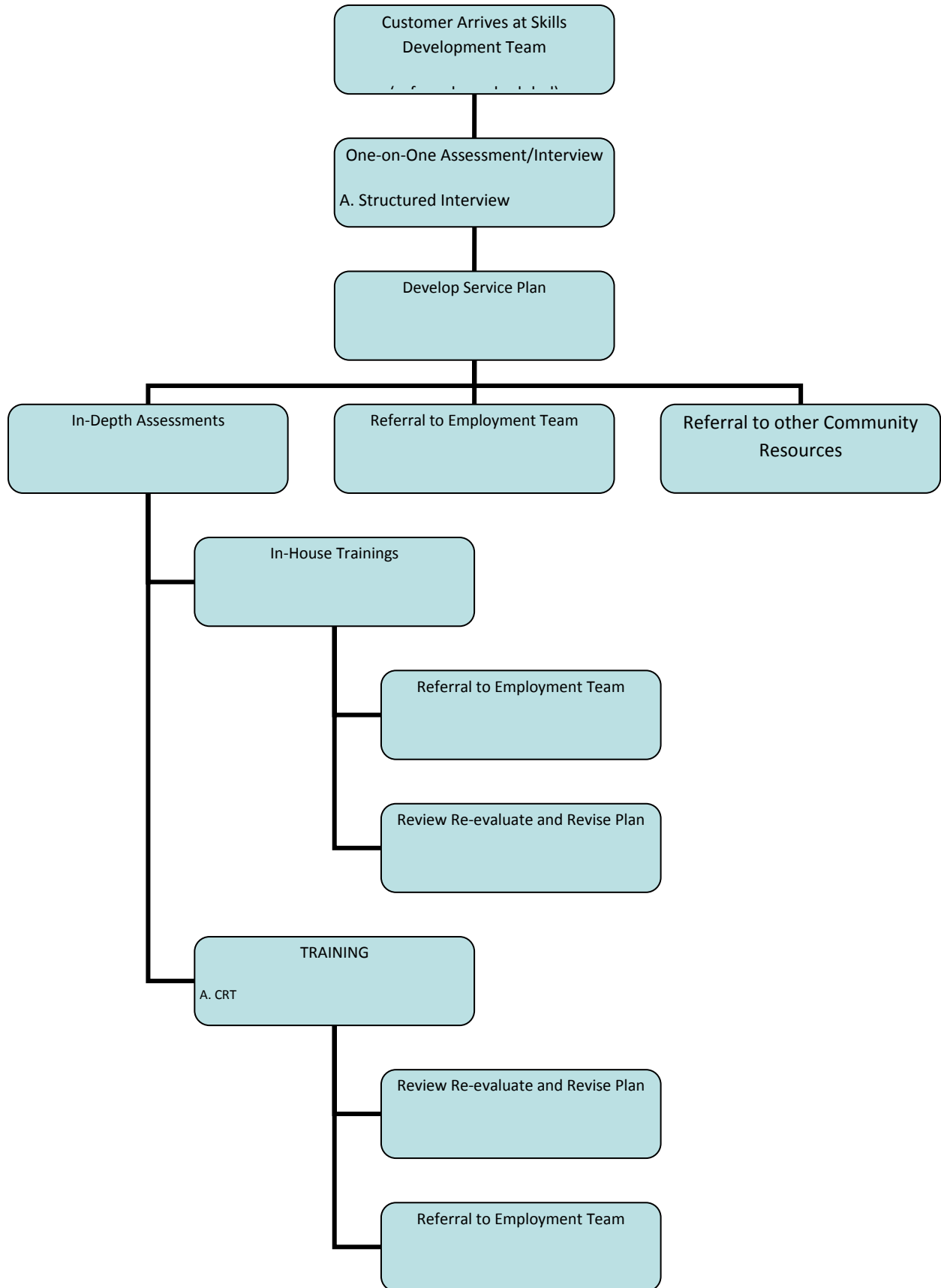


**SKILLS and  
CAREER  
DEVELOPMENT  
TEAM  
PROCEDURES**

## **Skills Team Mission**

The Skills and Career Development team will assist motivated customers by facilitating skill/career development to become self sufficient in a customer friendly and professional environment. Customers will explore new and enhanced existing career skills that are in demand by area employers. Customers will be able to sustain employment through the successful marketing of their skills.

# The Skills Team Process – Customer Flow



## **Skills and Career Development Team Job Description: Employment and Training Specialist**

### **Functional Responsibilities**

- Conduct intensive needs assessments with customers to identify skills, aptitudes, interests, and supportive service needs. Prepare various forms of testing/assessment for customers, including selecting appropriate testing/assessment tools, proctoring tests, and interpreting results for each customer.
- Deliver a variety of employment and skill development services for customers addressing their needs in the areas of education, employment, and supportive services. Deliver these services in both group and one-on-one settings to customers with diverse backgrounds. Maintain a high level of familiarity with the local labor market to ensure that services are aligned with employer and labor market needs.
- Develop Individual Plans (IP) with customers that establish appropriate career goals and detail specific plans for New Mexico Workforce Connection services, skill development activities, and job search strategies. Update and modify the plan as needed to ensure that customer needs are met.
- Facilitate and arrange for the customer to attend needed skill development activities. This can include arranging for both in-house training sessions as well as classes at various area training providers, including post secondary institutions. As appropriate, assist the customer with the scheduling of needed training activities and with the search for financial aid.
- Meet one-on-one with customers to develop job search plans and advise them on their job search process. Assist customers with writing and revision of job search paperwork, including employment applications, cover letters, and resumes. Conduct practice interviews and provides networking advice. Assist customers in locating positions of employment in the community, including obtaining job listings and employment ads and notifying customers of employment opportunities. Make referrals to the Business Services unit as appropriate based on knowledge of employer requirements. Assists customer with utilizing computers, including internet job listings, career software programs, and printer.
- Assess customer financial need. Create, monitor and modify individual customer budgets, while developing justification for New Mexico Workforce Connection services.
- Maintain proper documentation of customer's information, activities, and case notes entered into NMVOSS, ensuring compliance and performance. Oversee and maintain files and computer databases ensuring proper documentation is available to support program eligibility and services received.
- Maintain knowledge of other community agencies and programs and training offered.
- Maintain communication with and refer individuals as appropriate to other community and partner agencies.
- Maintain current knowledge on occupational, educational, and economic information to assist individuals in defining vocational and educational goals. May serve on Rapid Response Team, including attending related meetings, providing employment services to companies that are eliminating workforce. May travel to various companies to provide training to their workforce, including job search, educational, and occupational information.
- May occasionally assist with special projects, including, but not limited to, specialized outreach programs to targeted groups, the development of new skills training activities, and the delivery of specialized recruitment and training activities for local employers.
- Attend staff meetings, submit required reports, interpret program information, and make policy and procedural recommendations.

- Contribute in their team role(s) to ensure New Mexico Workforce Connection Center performance standards are met and/or exceeded, while ensuring compliance with Federal, State, and Eastern Area Workforce Development (EAWDB) rules and regulations.
- Performs other related duties as assigned.

### **Qualifications**

- Minimum of three years professional work experience in the workforce development system.
- Ability to work as a member of a functional team that provides employment and skills development services to job seekers.
- Knowledge of skills and aptitude assessment tests and ability to interpret and analyze test results. Ability to conduct customer interviews seeking information that will assist in the identifying service needs.
- Knowledge of and ability to provide training to customers on resume preparation, proper interviewing skills/conduct, and networking skills. Ability to assist customers with on-line job search activities.
- Knowledge of the local labor market, including jobs in demand, employer skill expectations, and wages. Ability to organize and present this information to groups of customers and/or to individuals.
- Ability to effectively deliver workshop curricula on a range of skill development topics. Effective presentation skills will be required to ensure that these curricula are customized to meet customer needs.
- Ability to maintain accurate and organized records in an automated case management system. Ability to maintain these records in an on-line, real-time environment.
- Ability to compile, analyze, and evaluate data, make determinations, and present findings in oral or written form.
- Ability to maintain confidentiality of customer information and records according to legislated and policy requirements.
- Ability to work alone with minimum supervision and work with others in a team environment. Ability to work rapidly for long periods and work on several tasks at the same time, often under pressure. Ability to meet deadlines for the completion of required activities.
- Ability to effectively communicate orally and in writing with co-workers, other New Mexico Workforce Connection teams, various community organizations, educational institutions, employers, training providers, customers, and the public, including being sensitive to professional ethics, gender, cultural diversities and disabilities.
- Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.
- Ability to meet all hiring requirements.

## **Skills Team Process – Overview of Customer Flow**

### **1. Arrive at Skills**

a. Customer is assigned to Skills Team and Skills Team Member

### **2. Interview**

a. Collect all WIA intensive eligibility verification data and determine if individual is eligible for intensive services under WIA (Citizenship, selective service, employment, income information, layoff information if applicable)

b. Review NMVOSS Data and Assessment scores to gain baseline understanding of customer

c. Collect and add any new information about the customer as needed

- d. Learn the reason the customer has come to the center (“Why are you here”)
  - e. Look for specific skills that the customer may need to be successful in their effort to find work
  - f. Identify and arrange for first services to ensure immediate engagement of customer to New Mexico Workforce Connection activities
- 3. In-Depth Assessment (required of some customers)**
- a. Determine customer goals and barriers
  - b. Determine how customer goals fit within local labor market demand
  - c. Complete appropriate assessment(s) of customer to better define current skills and skills gaps
  - d. Determine if there is any additional documentation that is needed to serve the customer
- 4. Develop Individual Plan (IP)**
- a. Outline the customer’s goals
  - b. With the customer present, outline the steps necessary to reach their employment and wage goals
  - c. Assign the customer to needed activities
  - d. Identify possible supportive service needs
  - e. When necessary, staff the customer with other team members to coordinate activities and funding
- 5. Assign Activities**
- a. Assign the customer to the appropriate activities as identified in the IP
  - b. Review attendance requirements and other required documents
  - c. Provide supportive services or make appropriate referrals if needed to ensure customer success in planned activities
  - d. Schedule additional appointments or additional activities as needed to ensure customer success. Whenever possible, the customer should not leave without another activity or scheduled visit to the New Mexico Workforce Connection Center.
  - e. Retain fiscal flexibility by registering customers in all appropriate funding streams
- 6. Review, Evaluate, and Revise Plan as Necessary**
- a. Review outcomes from all activities
  - b. Update and revise the IP with additional services as needed
  - c. Continue to review customer needs for supportive services and provide these services or refer to community agencies as necessary.
- 7. Follow-along**
- a. Coordinate with the Tracker to follow up with customers that have not been to the New Mexico Workforce Connection Center for over 60 days to determine needs for additional services.
  - b. Maintain regular email contact with customers to ensure they are receiving information on New Mexico Workforce Connection services and job leads.
- 8. Obtain Employment**
- a. Once customer has been successful in their job search, collect and record this information (if known).
  - b. Complete a final review of supportive service needs that relate to the customer’s ability to retain employment. Provide supportive services as necessary or refer customer to other community agencies.
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## **Skills Team Process – Transition from Welcome Team and Immediate Engagement in New Mexico Workforce Connection Services**

A. **Greet the Customer:** Customers may be walked back by the Welcome Team or they may be coming into the center for a scheduled appointment. In either case, when the customer arrives in the Skills Team, they will be greeted in a professional and friendly manner.

B. **Handling Customers that are Walked Back:** If the customer is walked back by the Welcome Team, the following three things will occur with each customer:

1. If the customer that is walked back is a veteran, the customer will be referred to a Veterans Staff person. If a Veterans Staff person is not available, the customer will be served by any available Business Services Team Specialist.

2. The customer will be given an explanation of the services and support that can be expected from the Skills Team. The staff person will identify any immediate service(s) that the customer may require and desire. If the customer has not completed their registration in NMVOSS, the customer will be instructed to complete this activity at this point.

a. The Staff should review the customer's registration to ensure that it is properly completed. Assistance in improving the customer's work registration should be provided by the Staff as appropriate.

b. If the customer completes the work registration process and needs to schedule a time to come back, a follow up appointment should be scheduled for the customer to return for a second visit.

3. In an attempt to immediately engage the customer in New Mexico Workforce Connection activities, the Staff will provide the customer with an immediate service consistent with the information learned in the initial interview. Examples of services that can be offered to customers on an immediate basis would include:

← Creation of a KeyTrain account and a brief overview of how to use the KeyTrain system

← Schedule the customer for a workshop consistent with their stated needs or desires

← Connect the customer to an e-learning or tutorial based activity

← Provision of a resume builder to help the customer begin thinking through information that will be needed to build an effective resume

← Provision of job leads consistent with the customer's abilities as measured in initial assessment activities

← Provision of information about an upcoming job fair and suggestions to the customer for preparing for this event

← Familiarizing the customer with the Skills Team resources and encouraging them to begin exploring internet job search sites

← Provision of information (as appropriate) on a range of topics including job search issues, job interview tips, tips for conducting an internet job search, resume tips and suggestions, employment testing, financial aid information, job fairs, and other topics

4. The Staff will schedule the customer for an appointment as necessary in order to further pursue desired skills development services. An appointment card will be provided to the customer to remind them of the appointment date.

C. **Handling Customers that come for an Appointment:** If the customer is coming for an appointment (whether scheduled by the Welcome Team or the Skills Team), the following four things will occur with each customer:

1. If the customer coming for an appointment is a veteran, the customer will be seen by a Veterans Staff person. If a Veterans Staff person is not available for the appointment, the customer will be seen by any available Business Team Staff.

2. A structured interview will occur with every customer. The purpose of this interview will be to learn the detailed work history of the customer and to clarify skills, educational, and/or personal issues which could affect customer success. This interview will focus on issues that help identify a need for skills development services, employment services, support services, and/or counseling support to assist the customer in making progress towards defining and achieving their specific job/career goals. This interview will also serve as the first step in the development of an Individual Plan (IP) for the customer.

3. If the customer has not completed their registration in NMVOSS system, the customer will be directed to complete this activity at this time. The Staff will work with the customer by reviewing their registration to ensure its completeness and accuracy. If the customer completes the work registration process and needs to schedule a time to come back, a follow up appointment should be scheduled for the customer to return for a second visit.
4. In an attempt to immediately engage the customer in New Mexico Workforce Connection activities, the Staff will provide the customer with an immediate service consistent with the information learned in this interview. Examples of services that can be offered to customers on an immediate basis have been identified in section B.3. above.
5. The customer should be scheduled for further services and one-on-one meetings as appropriate.
6. The appropriate activity must be recorded in NMVOSS to report the service that the customer receives. Additionally, a case note must also be entered into NMVOSS to describe the service that was provided.

## **Skills Team Process – Additional Assessment Activities**

**A. Completing Additional Assessment Activities with the Customer:** Once the customer has been immediately engaged in New Mexico Workforce Connection services, additional and more comprehensive assessments may be needed. Each customer assigned to the Skills Team will participate in additional assessment activities as appropriate, based on the knowledge, expertise, and judgment of the Business Services Staff. These assessment strategies will fall into three broad categories as follows.

1. Certain assessments are required for any customer that is to participate in occupational skills training, on-the-job training, or customized training with an employer. The required assessment for these customers will be the appropriate TABE Survey or WorkKeys, to measure the customers academic or employability skills in the areas of reading and math that will help ensure the customer has the foundational basic skills to be successful in planned training activities.
2. A review of the customer’s financial circumstances (their budget) is required when that customer is to receive occupational skills training, on-the-job training, customized training, and/or support services. This budget is necessary to help identify the need and level of New Mexico Workforce Connection financial support that may be required for training and/or supportive services.
3. The following assessment strategies may be administered by staff as appropriate to help identify customer aptitudes and skills, learning styles, and service needs.

Examples of additional assessment strategies that can be used include:

<b>Assessment Strategy</b>	<b>Purpose of Strategy</b>
KeyTrain Assessments	KeyTrain assessments can be used to determine specific academic remediation needs of customers. They can also be used to assess the customer’s readiness to complete an employment test
Aptitude/skills tests, including WorkKeys	These assessments measure specific career aptitudes and/or employer skill expectations. They may also measure technical or social skills
Aptitude/skills tests, including WorkKeys	These assessments measure specific career aptitudes and/or employer skill expectations. They may also measure technical or social skills
Career Interest Inventory	These assessments are used to help customer’s explore their interests and aptitudes and to help

	determine career goals
Verification of a Disability	This verification is appropriate if additional services are needed or accommodations need to be made to ensure customer success in planned activities. This verification will also help to determine the need for referral to VR or a physician to identify these additional services or accommodations
Required Training Provider Assessments	Many post secondary schools require that assessments be completed as part of their registration and enrollment process. These assessments are effective at helping to identify a customer's readiness for occupational skills training as well as any remediation needs that may exist

4. Each time that a customer participates in a more comprehensive assessment activity, this service must be reported in NMVOSS. A case note must also be recorded in NMVOSS that summarizes the assessment services the customer received. This case note must provide the following information:

- a. Describe the assessment activity in which the customer participated; and,
- b. Describe any additional and/or critical information learned from the assessment activity.

**B. Optional Staffings:** Based on the results of the comprehensive assessment, the Staff may choose to schedule a meeting with other specialized team members to discuss individual customer assessment results and the implications of these results on planned services.

Additionally, the Staff will share these results with Business Team staff to seek input on what job search or placement services may be most appropriate.

**C. Individual Plan (IP) creation:** Based on all of the assessment results, a service strategy will begin to develop. Specific procedures for developing IPs for customers are found in the next section of the manual.

## Skills Team Process – IP Planning and Development

### *Overview*

All customers receiving services will develop an Individual Plan (IP) which is critical to ensuring that the customer has a plan of action for building their skills and achieving their employment goals. However, when “training” dollars are to be expended on a customer, additional IP details will be included in case notes.

**A. Initial Customer Discussion:** The IP development process will actually have begun in the one-on-one interview with each individual customer. As part of this interview, the Staff will explain to the customer the purpose of the IP and what to expect from the service planning process. If the customer has been asked to bring additional information with them to this interview as part of the planning process, this will also be reviewed.

**B. Develop IP with Customer:** By this point in the process, the customer should be prepared to commit to writing their education and career goals. The Staff and the customer will work together to plan the customer's service strategy based on the results of assessment activities. The IP will be focused first and foremost on broad employment and education outcomes relative to Common Measures performance standards, including a strong focus on skill acquisition relative to the local labor market need. Specific IP expectations will include:

1. If the customer is to receive intensive services only, the IP will be used to capture all service strategies and plans.

2. If the customer is to participate in occupational skills training, on-the-job training, or customized training activities, additional details about the IP must be included in a case note.

**C. Record a Case Note in NMVOSS:** The Staff must also enter a case note in the NMVOSS system on the same date that the IP is developed. The case note should be titled “Enter/Exit customer into IP Activity.” This case note should include a narrative containing the following information:

1. Describe the specific IP planning activities in which the customer participated;
2. Describe the services that have been planned for the customer and how these services will help the customer achieve their employment goal; and,
3. If the customer is to participate in occupational skills training, OJT, or customized training activities, include a quick summary of the planned training schedule with a beginning and end date, the planned provider for each training activity, a rationale for referring the customer to training services, and any planned investments that are expected.

**D. Remind the Customer of First Activity:** The Staff will make sure that the customer knows when they are expected to be at the first training activity. If appropriate, an appointment card will be provided to the customers with this information.

**E. Ongoing Communication with the Customer:** The Staff will review the customer’s progress in planned activities and will schedule customer meetings as appropriate to ensure customer success in these activities and make adjustments to the IP as needed.

**F. Updating the IP as Needed:** As activities are planned and scheduled, it may be necessary to update the customers IP from time to time.

1. There is no need to update a customer’s IP if a simple schedule change has been made, but the goal remains the same and the customer remains on track. These minor changes can be documented in a case note with a simple explanation that would enable another Staff to understand what has happened.
2. The IP will be updated if there are changes in planned training activities for the customer. The process for updating an IP will be the same as the IP development process detailed in this section of the manual. To report this service, the Staff will enter an activity in the NMVOSS system on the same date that the activity is provided. The Staff will also enter a case note on this same date that is titled “Enter/Exit Customer into IP Review Activity.”

## **Skills Team Process – In-House Pre-Vocational Training and Workshops (Including Computer Training)**

### ***Overview***

Many New Mexico Workforce Connection services are delivered in group training or workshop settings. This will include job search workshops, customer service training activities, time management classes, computer classes, and various academic training activities such as KeyTrain or math brush up classes. Many of these pre-vocational activities will be delivered by New Mexico Workforce Connection staff, while other more specialized pre-vocational activities may be delivered by outside vendors. However, it is clear that these pre-vocational activities will be the backbone of the New Mexico Workforce Connection continuous engagement strategy since customers will be provided with many opportunities to participate in these on-site skill building activities.

**A. Identify Customer Need for Service(s):** The Staff will meet (or talk) with the customer to identify specific pre-vocational activities that the customer may need. The Staff will use available assessment results to help guide this discussion, ensuring that any barriers identified in the assessment process are addressed.

**B. Schedule the Customer:** As the need for pre-vocational services is identified, the Staff will immediately work with the customer to identify an appropriate date and time for the activity to begin.

1. If the customer is being referred to an in-house training or workshop activity, the

Staff will directly schedule the customer for the activity using the New Mexico Workforce Connection internal scheduling system. When scheduling the customer for an activity, the Staff should enter the customer's name on the schedule as well as their own name or initials (this will help in communicating attendance information on the day of the activity). The customer will be informed of the date and time of the planned activity and an appointment card will be given to the customer if appropriate.

2. If the customer is being referred to a training or workshop activity that is being delivered by an outside vendor, the Staff will need to make arrangements with the vendor for the customer to attend the planned activity. This will include the following steps.

a. The vendor will be contacted directly by the Staff and the customer will be scheduled for the planned activity.

**C. Ensure Customer Attendance:** In order to report the service as being provided, customer attendance at these workshops and pre-vocational training activities must be documented. Plans for tracking customer attendance will include the following.

1. If the workshop or pre-vocational training activity is delivered by New Mexico Workforce Connection staff, the classroom facilitator will communicate attendance with all Skills Team members. Each Staff will make an attempt (through email or phone) to contact any customer that did not attend and get them scheduled back to the New Mexico Workforce Connection Center for services

2. If the workshop or pre-vocational training activity is delivered by an outside vendor, the customer will be asked to verify attendance information to NMWC staff. Staff will make an attempt (through email or phone) to contact any customer that did not attend and get them scheduled back to the New Mexico Workforce Connection Center for services.

**D. Enter NMVOSS Information:** Once it has been confirmed that the customer has participated in the workshop or pre-vocational training activity, this service (along with a case note) must be entered into the NMVOSS system.

1. If the workshop or pre-vocational training activity is delivered by New Mexico Workforce Connection staff, the classroom facilitator will enter each customer into the appropriate activity in the NMVOSS system and include a case note (which is dated the same as the activity record) that includes the following information:

a. Identify the specific workshop or pre-vocational training activity in which the customer has participated; and,

b. Briefly describe the content and purpose of the workshop or pre-vocational training activity.

2. If the workshop or pre-vocational training activity is delivered by an outside vendor, Staff will be provided attendance information and will use this information to enter the customer into the appropriate activity in the NMVOSS system. Staff will also enter a case note (which is dated the same as the activity record) that includes the information noted above.

**E. Customer's Resume is Updated:** Once the customer has completed the workshop or pre-vocational training activity, the Staff will need to determine if the customer's resume needs to be updated. For example, if the customer just completed a Microsoft Word class, this fact might be added to the customer's resume. Staff will ensure that the customer's resume reflects any new skills attained through these activities.

## **Business Team Process – Referral for Veterans Specific Support**

### **Overview**

Many veterans will access employment and training services through the New Mexico Workforce Connection system, including the full line of job training and job search services that are offered. Additionally, customers that are veterans are also entitled to certain preferences in the job searching and job referral process. To ensure that veterans have access to all needed services and that veterans preference is applied as required, the following procedures have been put into place.

**A. Identify Customers that are Veterans:** Most customers that are veterans will be identified by the Welcome Team during their one-on-one activities. Moreover, the fact that these

customers are veterans will be shared by the Welcome Team when the customer is referred to the Skills Team for services. The process for engaging customers that are also veterans will be as follows.

1. As veterans come into the Skills Team, they will be seen by available veteran staff who will then provide the full range of services available in the New Mexico Workforce Connection Center to the veteran.

2. If Veterans Staff are unavailable (they are with another customer for example), the veteran should be seen by the next available Skills Team Staff. This will ensure that veterans receive quick and efficient services and that they can get the service(s) they require during their visit.

**B. Refer Customers that are Veterans to Veterans Staff as Needed:** As Staff see veterans and provide the full range of New Mexico Workforce Connection services to them, some veterans will most certainly have issues or questions that are specific to veterans preference, veterans benefits, or veterans programs. When this occurs, the Staff must arrange for the veteran to meet with a Veterans Staff person to address the issue or question.

1. If a Veterans Staff person is available to see the veteran on an immediate basis, the veteran will be referred for immediate assistance with their issue or question.

2. If a Veterans Staff person is not available, the veteran will be scheduled for an appointment with the Veterans Staff. The veteran will be provided with all other services that the Staff can provide and be given an appointment card as a reminder of the day and time of their return visit.

**C. Enter NMVOSS Information:** When veterans are provided with services (either by Veterans Staff or a Business Team Staff), these services must be reported in the NMVOSS system along with a case note that is dated the same date as the service in NMVOSS. Case note for veterans services should include the following information:

1. Describe the service being provided to the veteran (for example, working on a resume, preparing for an interview, or dealing with a VA or GI Bill question); and,

2. Describe two details that show the depth of service being provided to the veteran (for example, two jobs/employers to which resumes were mailed, two details about the interview preparation activity, or two suggestions for addressing the VA or GI Bill questions that were raised).

## **Skills Team Process – Basic Skills Training Activities**

### ***Overview***

Following the completion of basic and more detailed assessments of New Mexico Workforce Connection customers, some customers may be identified that require basic skills training. While some of these customers may need a basic math brush up course, others may need remediation in specific areas, and still others may need help getting their GED. For many customers, this basic skills service may make the difference between obtaining and not obtaining a good job.

**A. Identify Customer Need for Service(s):** The Staff will meet with the customer to review assessment results and identify any specific basic skills training activities that will enhance the customer's employability. The Staff will use available assessment results to help guide this discussion, ensuring that any basic skills issues are addressed.

**B. Schedule the Customer:** As the need for basic skills services is identified, the Staff will immediately work with the customer to identify an appropriate date and time for the activity to begin.

1. If the customer is being referred to an in-house basic skills activity (KeyTrain for example), the Staff will directly schedule the customer for the activity to begin. The customer will be informed of the date and time of the planned activity and an appointment card will be given to the customer if appropriate.

2. If the customer is being referred to a basic skills activity that is being delivered by another provider, the Staff will need to make arrangements with the provider for the customer to attend the planned activity.

a. The Staff will contact the basic skills provider and schedule the customer to begin basic skills training on an agreed upon date. The Staff will also arrange for the appropriate information to be given to the provider so that they can accurately understand the customer's need(s).

b. The customer will be provided with the schedule (dates and times) of the planned basic skills activity. The importance of good attendance will be emphasized with the customer and expectations for attendance will be established.

c. The Staff will enter a case note in NMVOSS indicating that a referral has been made to a basic skills activity.

**C. Ensure Customer Attendance:** In order to report the service as being provided, customer attendance at the basic skills training activity must be documented. Plans for tracking customer attendance will include the following.

1. If the basic skills activity is delivered by New Mexico Workforce Connection staff, the classroom facilitator will communicate attendance with all Skills Team members. Each Staff will make an attempt (through email or phone) to contact any customer that did not attend and get them scheduled back to the New Mexico Workforce Connection Center for services.

2. If the basic skills activity is delivered by another provider, the customer will be asked to verify attendance information to staff. Staff will make an attempt (through email or phone) to contact any customer that did not attend and get them scheduled back to the New Mexico Workforce Connection Center for services.

**D. Enter NMVOSS Information:** Once it has been confirmed that the customer has participated in the basic skills activity, this service (along with a case note) must be entered into the NMVOSS system.

1. If the basic skills training activity is delivered by New Mexico Workforce Connection staff, the staff will enter each customer into the appropriate activity in the NMVOSS system and include a case note (which is dated the same as the activity record) that includes the following information:

a. Identify the specific basic skills activity in which the customer has participated; and,

b. Briefly describe the content and purpose of the basic skills activity.

2. If the basic skills activity is delivered by another provider, Staff will be provided attendance information and will use this information to enter the customer into the appropriate activity in the NMVOSS system. Staff will also enter a case note (which is dated the same as the activity record) that includes the information noted above.

**E. Customer's Resume is Updated:** Once the customer has completed the basic skills training activity, the Staff will need to determine if the customer's resume needs to be updated. For example, if the customer just attained their GED, this fact would need to be added to the customer's resume. The Staff will ensure that the customer's resume reflects any new skills attained through these activities.

## **Skills Team Process – Referral to Business Team Workshops and Products**

### **Overview**

In the New Mexico Workforce Connection system, the Business Team will offer a number of workshops and products that many Skills Team customers will need to access. This will include a wide array of job search workshops, including sessions on resume writing, interview preparation, and internet job search. One of the foundational principles of an integrated system is that all customers can access all available services and products in the New Mexico Workforce Connection system. To that end and to ensure customers access to specific job search and job placement activities, customers connected to the Skills Team will be referred to and scheduled to participate in Business Team activities as needed.

**A. Identify Customer Need for Service(s):** The Staff will meet (or talk) with the customer to identify specific Business Team activities that the customer may need to facilitate their job

search process. The Staff will review the customer's resume and assess the customer's overall job search knowledge to help guide this discussion, ensuring that any barriers identified in the job search process are addressed.

**B. Schedule the Customer:** As the need for Business Team activities is identified, the Staff will immediately work with the customer to identify an appropriate date and time for the activity to begin.

1. The Staff will directly schedule the customer for the Business Team activity.
2. The customer will be informed of the date and time of the planned activity and an appointment card will be given to the customer if appropriate.

**C. Ensure Customer Attendance:** In order to report the service as being provided, customer attendance at these Business Team activities must be documented. To ensure that this occurs, the resource room facilitator will communicate attendance with all Skills Team members. Each Staff will make an attempt (through email or phone) to contact any customer that did not attend and get them scheduled back to the New Mexico Workforce Connection Center for services.

**D. Enter NMVOSS Information:** Once it has been confirmed that the customer has participated in the Business Team activity, this service (along with a case note) must be entered into the NMVOSS system. Specifically, the staff will enter each customer into the appropriate activity in the NMVOSS system with a case note (which is dated the same as the activity record) that includes the following information:

1. Identify the specific Business Team activity in which the customer is participating; and,
2. Briefly describe the content and purpose of the activity.

## **Skills Team Process – Occupational Skills Training**

### **Overview**

Many New Mexico Workforce Connection customers will participate in skill building activities; however, some of these customers will participate in formal skills training that lead to certifications, degrees, and other credentials. Typically, these customers will have job/career goals that require a formal certification or formal skills training. For customers that are assessed as appropriate and ready for occupational skills training, the following procedures will be utilized.

**A. Requirements to Access Occupational Skills Training Programs:** Depending upon the funding stream that is being considered to pay for needed skills training activities, the following requirements exist for a customer to be considered for this activity.

1. If the WIA funding stream is being considered and the customer is *unemployed*, the customer must have participated in a assessment testing and be determined to be in need of skills training activities to earn a self-sufficient wage.
2. If the WIA funding stream is being considered and the customer is considered to be *under-employed*, the customer must have participated in a assessment testing activities and must not be earning a self-sufficient wage. For purposes of this process, refer to the New Mexico Workforce Connection Eligibility Policy for customer earning limits.()
3. If the dislocated funding stream is being considered, the customer must have participated in assessment activity, must have been displaced from the employer. ()
  - ← No suitable employment is available for the customer;
  - ← The customer would benefit from participation in an appropriate training activity;
  - ← There is a reasonable expectation of employment following completion of the training activity;
  - ← The training to be approved is reasonably available to the customer and first consideration has been given to opportunities within a normal commuting area;
  - ← The customer is qualified to undertake and complete the training activity; and,
  - ← The planned training is suitable and available at a reasonable cost.
4. All customers will apply for financial aid (Pell Grants) unless it is determined that the specific school that is being considered does not accept Pell Grants.

**B. Identify Specific Customer Need for Training:** Once it has been determined that the customer meets the required criteria to participate in occupational skills training activities, the Staff will meet with the customer to review the need for specific credentials or degrees that can be earned through occupational skills training. As part of this conversation, the Staff will also address specific skills that must be acquired through the formal training activity. The Staff will use available assessment results to help guide this discussion, ensuring that all certification and skill issues are addressed. Other questions that the Staff will explore with the customer include:

- ← Are the certifications and skills in demand by employers in the Eastern labor market?
- ← What are the current skill levels of the customer and what level of training is needed to build upon and enhance these skills?
- ← What are the customer's testing and assessment scores and do these scores indicate that the customer could be successful in the planned training activity?
- ← What credential is required by employers in the customer's desired career field?
- ← How does the customer plan to use these skills and what job will result from the training?
- ← Does the customer have any barriers (transportation, child care, living expenses) that will need to be addressed to ensure success in a training activity?
- ← How will the customer meet current financial obligations while they are attending formal training activities?
- ← What training vendors can provide the needed training/credential and what are the schedules and costs of their training programs?

**C. Schedule the Customer:** After these initial discussions, the Staff and customer should have reached an agreement that occupational skills training is needed to improve skills that will result in employment. At this point, the Staff will immediately begin working with the customer to begin the process of identifying the specific training activity(ies) that the customer will attend. This process will include the following steps.

1. A specific occupational skills training program and vendor will be selected.
2. The vendor will be contacted and the customer will be registered for the training program. Registration may also occur electronically for many local training vendors. However, in all cases, the Staff will request a confirmation statement from the vendor and give a copy to the customer for their information.
3. The Staff will complete a ITA contract for the selected training vendor. The ITA contract will identify the specific training program by name as well as all expenses that New Mexico Workforce Connection will cover for the customer. In all instances, the customer will sign the ITA contract, indicating their concurrence with the training plans.
  - a. If WIA funds are being used to pay for the training, the training voucher must be signed by an Staff who is employed by the service provider (or a representative of the service provider if the Staff is employed by the State of New Mexico).
  - b. If TAA funds are being used to pay for the training, the training voucher must be signed by Staff who is employed by the State of New Mexico (or a representative of the State of New Mexico if the Staff is employed by the service provider).
4. One copy of the ITA contract must be sent to the vendor and the original must be sent to the fiscal department of the service provider. The Staff should also keep one copy for their customer file.
5. The customers IP must be updated to include planned training activities and investments. For TAA and WIA customers.
6. Prior to start of training the Staff will conduct a brief school orientation explaining the requirements for attendance, schedules, grades, and midterm reports. Attendance forms will also be provided to the customer along with an explanation on how to complete and submit them.

7. **At this point, a file is created for the customer.** There will be six sections in the file, the first section will include Voss applications and eligibility documents, the 2<sup>nd</sup> section will contain IP, case notes, VOSS activities and assessments. 3<sup>rd</sup> section will contain ITA contracts, ETPL, degree plan, grades and financial aid documentation. 4<sup>th</sup> sections will contain, vendor Financial Claim for payment and receipts. 5<sup>th</sup> sections will contain attendance sheets. 6<sup>th</sup> section will contain credentials and follow-up information.

**E. Enter NMVOSS Information:** Once it has been confirmed that the customer is participating in the training activity, this service (along with a case note) must be entered into the NMVOSS system. NMVOSS expectations at this point will require that three items be entered into NMVOSS (all on the same date):

1. In NMVOSS, the Staff will record a service for the occupational skills training activity. The date of the service will be the first date of class and the planned exit date will be the published last date of the class.
2. In NMVOSS, the Staff will obligate funds that are required to support the planned training activity.
3. In NMVOSS, the Staff will enter a case note for this activity that includes the following four pieces of information.
  - a. Summarize why the customer is unable to obtain/retain employment with the services that have been provided (e.g. a review of the customer's skills gap that is to be addressed through the training activity). Other barriers to employment should also be noted and could include a sentence addressing the customer's financial need;
  - b. Describe the specific training program the customer will be attending and the training institution that will deliver the training.
  - c. Detail the status of any PELL grants and/or other sources of financial aid that is available to the customer. If the customer has selected a training program that is not PELL eligible, this fact should be noted in the case note; and,
  - d. Describe the skills that the customer is to acquire as a result of the training activity and how these skills will assist the customer in attaining their employment goal.

**F. Monitor Customer Progress:** Throughout the training activity, the Staff will stay in contact with the customer and make changes or adjustments to the planned training activity/schedule as needed.

1. All customers in occupational skills training activities should be contacted as required to ensure their attendance and progress in the activity. These contacts can be made over the phone, through email, or in-person (whichever is the best manner for the contact to be made).
2. The Staff will request submission of mid-term and final grade reports to assess customer progress in training activities.

**G. Closing the Training Activity:** When the customer completes planned training activities, there are specific steps that must be followed to close this activity in NMVOSS. These steps include:

1. The Staff should obtain copies of the customer's certificates of completion as well as copies of any credentials, certifications, or degrees to verify successful completion of training activities. The Staff will record these credentials in NMVOSS.
2. The Staff will close the occupational skills training activity in NMVOSS at the completion of the training program, using the published semester end as the date of completion. As appropriate, other activities may also need to be closed as well.
3. The Staff will enter a case note in NMVOSS that indicates the customer has completed the training program. If a degree or credential has been earned, this will also be reviewed in the case note.
4. If the customer is a TAA customer, the Staff will terminate any TRA monetary benefits, with the possible exception of TRA-B (if the participant still meets the TRA-B requirements).

**H. Update Customer's Resume:** Once the customer has completed the occupational skills training activity, the Staff will work with the customer to update the customer's resume. For example, if the customer just attained their LPN license, this fact would need to be added to the customer's resume. The Staff will ensure that the customer's resume reflects any new skills attained through training activities.

**I. Report Employment Outcome if Known:** If, in conversation with the customer, it becomes known that the customer has obtained employment, the Staff will enter the job and wage information into the Work History section of NMVOSS to report this outcome.

## **Skills Team Process – On-The-Job Training Activities**

### **Overview**

On-the-job training (OJT) is intended to train customers in full time jobs for which they cannot receive training within a classroom setting due to the nature of job functions and activities. OJT may also be used with customers for whom classroom training has been determined to be an inappropriate way to learn new skills. In short, OJT enables customers to develop skills and progress to a higher performance level during a period of subsidized employment. OJT is also viewed as an employer service and, therefore, the employer services team will play a critical role in the OJT process.

**E. Identification of OJT Opportunities:** The Business Services Team will be constantly marketing a wide range of employer services, including OJT activities as appropriate. When the Business Services Team identifies an OJT opportunity, it will inform both the Skills and the Business Services Team of this opportunity and communicate the following specific information to the teams:

- ← Name and location of employer with the OJT opportunity;
- ← Job title, hours per week (full time or part time), and the scheduled daily hours of the position;
- ← Wage information for the position the OJT will train for;
- ← Job description or tasks list that details the critical functions of the job;
- ← Employer requirements for customers to be considered for the OJT opportunity (experience, education, skills, others); and
- ← Any specific training expectations that the employer may have.

**F. Identification of Customers for the OJT:** Once the job requirements and expectations are known, the next step is to identify customers that would be appropriate for the OJT.

1. Using the information that has been provided, Staffs will review their customer roster and/or applicants to identify customers that match up with these requirements and expectations. As Staffs identify customers they believe would be appropriate for the OJT, they will forward these resumes to the appropriate staff for review.

2. The Business Services Team will work with the employer through whatever process the employer requires (interviews, WorkKeys assessments, others) to identify the specific customers to be selected for the OJT opportunity.

3. When a customer is selected for the OJT opportunity, the Business Services Team will inform all Staffs of the selection.

a. The Business Services Team will inform the Staff that referred the customer that their customer has been selected. If there are specific items the customer must have before the OJT begins, this will be communicated to the Staff who will work with the customer to get prepared for the OJT.

b. The Business Services team will also inform all other Staffs that their customers were not selected. If there is any specific feedback on a customer that is not selected (for example, they

failed a drug test), the Business Services Team would communicate that information to the appropriate Staff.

**G. Execution of OJT Contract:** The Business Services Team will execute an OJT contract with the employer detailing the terms of the OJT and the training plans and expectations for the customer. A start and end date for the OJT will be identified in this contract and these dates will be communicated to the appropriate Staff.

**H. Enter NMVOSS Information:** Once it has been confirmed that the customer is participating in the OJT activity, this service (along with a case note) must be entered into the NMVOSS system. NMVOSS expectations at this point will require that three items be entered into NMVOSS (all on the same date):

1. In NMVOSS, the Staff will record a service for the OJT activity. The date of the service will be the first date of work for the customer and the planned exit date will be the end date of the OJT contract.

2. In NMVOSS, the Staff will obligate funds that are required to support the planned OJT activity.

3. In NMVOSS, the Staff will enter a case note for this activity that includes the following three pieces of information.

a. Summarize why the customer is unable to obtain/retain employment with the services that have been provided (e.g. a review of the customer's skills gap that is to be addressed through the OJT activity). Other barriers to employment should also be noted;

b. Describe the OJT training activity in which the customer is participating and identify the specific employer that will provide the OJT training; and,

c. Describe the skills that the customer is to acquire as a result of the OJT activity and how these skills will assist the customer in attaining their employment goal.

**I. Monitor Customer Progress in the OJT:** To ensure success for both the customer and the employer, OJT training activities will be evaluated in two primary ways.

1. The Business Services Team will evaluate the OJT by reviewing customer progress in the activity with the employer. Any information that is learned from this employer review will be shared with the appropriate Staff. If the employer identifies that the customer needs to improve their performance on the OJT, the Staff and a representative from the Business Services Team will work with the customer to develop the improvement plan. This plan will be communicated directly to the employer by the Business Services Team.

2. The Staff will evaluate the OJT by contacting the customer to collect their assessment of OJT progress. Any information that is learned from this customer review will be shared with the appropriate Business Services Team person, who can share this information with the employer if appropriate.

**F. Closing the OJT Activity:** When the customer completes planned OJT activities, there are specific steps that must be followed to close this activity in NMVOSS. These steps include:

1. The Staff should obtain copies of any credentials, certifications, or certificates that may have been earned while on the OJT. The Staff will record these credentials in NMVOSS.

2. The Staff will close the OJT training activity in NMVOSS at the completion of the OJT activity, using the last day the customer worked on the OJT as the closure date. As appropriate, other activities may also need to be closed as well.

3. The Staff will enter a case note in NMVOSS that indicates the customer has completed the OJT training program.

4. If the customer is to remain employed with the OJT employer, the Staff will enter the job and wage information into the Work History section of NMVOSS to report this outcome.

## **Skills Team Process – Referrals to Customized Training Activities**

### **Overview**

The Business Services Team will, through its work with employers, be developing customized training activities for specific employers in the region. Customized training involves the development of training activities that instruct customers in the specific skills required by a specific employer or group of employers (such as specific software skills). And, since the training has been designed to teach the specific skills required by an employer, the employer typically makes a commitment to hire from the pool of graduates that result from the training activity. As these customized training activities are developed, the Business Services Team will be requesting assistance in identifying and enrolling appropriate customers into these activities to meet employer needs.

**A. Identification of Customized Training Opportunities:** The Business Services Team will be constantly marketing a wide range of employer services, including customized training activities as appropriate. When the Business Services Team identifies a customized training opportunity, it will inform both the Skills and the Employment Team of this opportunity and communicate the following specific information to the teams:

- ← Name and location of employer for whom the customized training activity is being designed;
- ← Job title, hours per week (full time or part time), and the scheduled daily hours of the position being trained for;
- ← Wage information for the position being trained for;
- ← Job description or tasks list that details the critical functions of the job being trained for;
- ← Employer requirements for customers to be considered for the customized training opportunity (experience, education, skills, others); and
- ← Any specific training expectations that the employer may have.

**B. Identification of Customers for the Customized Training Activity:** Once the job requirements and expectations are known, the next step is to identify customers that would be appropriate to participate in the customized training activity.

1. Using the information that has been provided, Staffs will review their customer roster to identify customers that match up with these requirements and expectations. As Staffs identify customers they believe would be appropriate for the training activity, they will forward these resumes to the Business Services Team for review.

2. The Business Services Team will work with the employer through whatever process the employer requires (interviews, WorkKeys assessments, others) to identify the specific customers to be selected for the customized training activity.

3. When a customer is selected to participate in the training activity, the Business Services Team will inform all Staffs of the selection.

a. The Business Services Team will inform the Staff that referred the customer that their customer has been selected. If there are specific items the customer must have before the training begins, this will be communicated to the Staff who will work with the customer to get prepared for the training activity.

b. The Business Services team will also inform all other Staffs that their

customers were not selected. If there is any specific feedback on a customer that is not selected (for example, they failed a drug test), the Business Services Team would communicate that information to the appropriate Staff.

**C. Enter NMVOSS Information:** Once it has been confirmed that the customer is participating in the customized training activity, this service (along with a case note) must be entered into the NMVOSS system. NMVOSS expectations at this point will require that three items be entered into NMVOSS (all on the same date):

1. In NMVOSS, the Staff will record a service for the training activity. The date of the service will be the first date the customer participates in the training activity. The planned exit date will be the planned end date of the training program.
2. In NMVOSS, the Staff will obligate funds that are required to support the planned training activity.
3. In NMVOSS, the Staff will enter a case note for this activity that includes the following three pieces of information.
  - a. Summarize why the customer is unable to obtain/retain employment with the services that have been provided (e.g. a review of the customer's skills gap that is to be addressed through the OJT activity). Other barriers to employment should also be noted;
  - b. Describe the training activity in which the customer is participating and identify the specific employer that the training has been designed for; and,
  - c. Describe the skills that the customer is to acquire as a result of the training activity and how these skills will assist the customer in attaining their employment goal.

**D. Customer Progress in the Customized Training Activity:** To ensure success for both the customer and the employer, customized training activities will be evaluated in two primary ways.

1. The Business Services Team will evaluate the training activity by reviewing customer progress in the activity with the employer (or the training vendor that is providing the training for the employer). Any information that is learned from this review will be shared with the appropriate Staff. If it is identified that the customer needs to improve their performance in the training activity, the Staff will work with the customer to develop the improvement plan.
2. The Staff will evaluate the training activity by contacting the customer to collect their assessment of training progress. Any information that is learned from this customer review will be shared with the appropriate Business Services Team person, who can share this information with the employer (or training vendor) if appropriate.

**E. Close the Training Activity:** When the customer completes planned customized training activities, there are specific steps that must be followed to close this activity in NMVOSS. These steps include:

1. The Staff should obtain copies of any credentials, certifications, or certificates that may have been earned while in the training activity. The Staff will record these credentials in NMVOSS.
2. The Staff will close the training activity in NMVOSS at the completion of the activity, using the last day the customer participated in training activities as the closure date. As appropriate, other activities may also need to be closed as well.
3. The Staff will enter a case note in NMVOSS that indicates the customer has completed the customized training program.
4. If the customer is to begin employment with the employer for whom the training was developed, the Staff will enter the job and wage information into the Work History section of NMVOSS to report this outcome.

## **Skills Team Process – Support Services**

### **Overview**

On occasion, customers will need assistance with specific financial issues to ensure success in: (1) a New Mexico Workforce Connection training activity, (2) their own job search process, and/or (3) job retention. To ensure customer success in all three of these ways, support services will be provided as appropriate to customers who require them. Examples of support services would include books and school supplies for post-secondary training activities, uniforms or work clothes for new jobs, or assistance with a specific living expense that is required to ensure customer stability.

**A. Identify Customer Need for Support Services:** The Staff will meet (or talk) with the customer to identify specific support service needs that may exist. As part of this discussion, the Staff will review the following information:

1. The Staff will review the customer's budget to assess their financial circumstances as well as their overall need for assistance with specific financial issues. This budget is required to help identify the need and level of New Mexico Workforce Connection financial support that may be required for supportive services.
2. The Staff will review, in some detail, any specific support service issue that is identified that will interfere with the customer's success in training activities, the job search process, or with job retention. The specific impact of this issue on the customer's success will be identified through this review.
3. To the extent that issues are identified which will interfere with customer success, the Staff will review other community-based options to which the customer could be referred for the needed assistance.

**B. Refer to Community-Based Organizations (as appropriate):** Once a support service need has been identified, the customer should be referred to appropriate community based organizations that can provide the needed service. Customers should be given specific information on the organization, its location, and the process for accessing the needed support service. If this information is not known, the Staff will contact the community based organization and get this information for the customer. If there are no community based organizations that can provide the needed support service, the Staff will move to the next step in this process.

**C. Provide Needed Support Services:** If the needed support service cannot be provided through a community based organization, the Staff will provide the service directly to the customer.

1. To provide this service, the Staff will complete a purchase order for the needed service or (if appropriate) issue a gas card or bus pass to assist the customer with transportation needs. This PO must be signed by an Staff who is employed by the service provider (or another representative of the service provider if the Staff is employed by the State of New Mexico). The PO should be written to a specific vendor, for a specific amount, and for a specific item (and quantity if appropriate).
2. If a customer file has not already been created, the Staff will create a customer file to include the customer's budget review, copies of all purchase orders, and copies of any documentation

related to the need for support services (statements of book fees, for example, from a post secondary institution).

**D. Enter NMVOSS Information:** The Staff will enter the service that has been provided to the customer (along with a case note) into NMVOSS. The following specific NMVOSS entries will be made.

1. If the customer has been referred to a community based organization for the support service, the Staff will record the support services referral in the NMVOSS system. The Staff will also enter a case note in the NMVOSS system (on the same date as the referral) that includes the following information.

a. Identify the specific community based organization to which the customer is being referred; and,

b. Describe the specific support service the customer is to receive from this community based organization.

2. If the Staff has issued a PO and provided the support service directly to the customer, the Staff will record the support service in the NMVOSS system. The Staff will also enter a case note in the NMVOSS system (on the same date as the referral) that includes the following information.

a. Describe the customer's need for the support service to be provided, including the specific barrier that the support service is addressing;

b. Describe the efforts made to secure the needed support service from other community organizations; and,

c. Describe the specific support service that is to be provided.

3. The Staff will enter the obligation into NMVOSS, committing appropriate resources to cover expenses associated with the planned support services.

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## **Skills Team Process – Review, Re-Evaluate, and Revise IPs (Service Plans)**

### ***Overview***

As customers participate in various services and activities, their progress in attaining needed skills and in securing employment must be constantly evaluated. As this on-going evaluation occurs, many times a customer will need additional services to further improve their skills and/or to enhance their job placement prospects. Some customers may need additional skills training to fill skill deficits. Other customers may need assistance in developing a more focused job search effort to increase their chance of job placement. Whatever the case, the ongoing evaluation that occurs (and never stops) will identify these additional service needs.

**A. On-going Evaluation of Customer Progress and Need:** Upon completion of every planned activity and at appropriate times during the course of activities (e.g. mid term grades for customers in postsecondary training activities), the Staff will evaluate the progress of the customer in their skill development and job placement efforts. Key issues that must be addressed in this evaluation would include:

1. Was (or is) the customer successful in the activity. For example, did the customer gather the required skills to earn the desired certification? Or did the customer develop an effective resume that can be customized to different employers?

2. Have any barriers been identified that are interfering with the customer's ability to be successful in the activity?

3. Is there feedback from the customer or another source (schools, employers, training providers, partner organizations) that indicates a need for additional service(s)?

4. Has the customer been able to secure employment with the skills that have been attained?

**B. Customers with Additional Service Needs:** If, through this ongoing evaluation, a customer is determined to be in need of additional services, the Staff will immediately work with the customer to get them scheduled for the services they require.

1. Procedures for engaging customers in various skill development and job seeking activities have been detailed throughout this manual and should be followed.
2. As additional services are scheduled and provided, the customer's IP must be updated in NMVOSS. Additionally, these new services must be entered in NMVOSS (along with case notes that are dated the same day as the service).
3. At the completion of these additional services, the Staff and customer will once again evaluate the customer's progress and determine if additional services are still required. If so, these additional services will be immediately scheduled. This ongoing evaluation activity will continue until the customer has found employment.

**C. Customers that have Found Employment:** If the customer has been successful in their effort to secure employment, the evaluation process will shift to focusing on the customer's need for assistance in ensuring job retention.

1. As part of this evaluation process, key issues to be addressed by the Staff will include:
  - a. Does the customer have all of the skills necessary to be successful on the job? If not, what additional services can be provided to develop these skills?
  - b. Does the customer have the opportunity to earn a higher wage or move into a higher-level position with the employer? If not, does the customer need additional skills development efforts to move into these higher paying positions?
  - c. Does the customer have all of the items (work clothing, for example) that the employer requires on the job? If not, does the customer need assistance in securing these items?
  - d. Does the customer have all of the support systems in place to ensure job retention (child care, transportation, others)? If not, does the customer need assistance in developing these support systems?
  - e. Does the customer have any fears or concerns about their ability to be successful on the job? If so, how can these fears or concerns be addressed?
2. If additional services are provided to help ensure job retention, the customer's IP must be updated in NMVOSS. Additionally, these new services must be entered in NMVOSS (along with case notes that are dated the same day as the service).

## **Skills Team Process – Follow Along Activities (Tracker)**

### ***Overview***

The New Mexico Workforce Connection continuous engagement strategy dictates that many customers will be provided with services over the course of a program year. To maximize New Mexico Workforce Connection performance and to ensure that customers have every opportunity to get needed services, there will be staff identified as "Trackers" that will assist their teams in re-engaging customers to New Mexico Workforce Connection services that have been disengaged. These customers will also help their teams to track certain critical dates for customers such as WIA/TAA training dates and exit dates. In all, the Tracker will have three critical functions within the team.

**A. Re-Engage "Missing" Customers:** Trackers will monitor the NMVOSS system for customer alerts and attempt to re-engage customers that are identified as not receiving a service in over 60 days. The purpose of these contacts will be to provide information to these "missing" customers that will encourage them to contact the New Mexico Workforce Connection Center and get scheduled for additional services. Key strategies in attempting to re-engage these "missing" customers will include:

← Trackers will send email information (for customers that have email addresses) about upcoming customized employer recruitment events and encourage them to contact the New Mexico Workforce Connection Center for further information about these events. Additional information about job leads should also be included in these emails as appropriate.

- ← Trackers will send information to customers about upcoming workshops or training activities that may be of interest to the customer, again encouraging them to contact the New Mexico Workforce Connection Center for further information about these planned activities.
- ← Trackers will call (or contact alternate contacts when necessary) customers that have not received a service in 75 days. These customers are very near the 90 day soft exit date and must be contacted directly to determine if further services are desired and/or necessary.
- ← If the Tracker learns that one of these customers is working, they will report that information in NMVOSS and share it with the appropriate Staff.

**B. Monitor Critical TAA Information and Dates:** Trackers will monitor critical WIA/TAA dates and information for customers to ensure that these customers do not lose access to WIA/TAA and TRA benefits.

1. Trackers will collect attendance sheets as they are mailed to the New Mexico Workforce Connection Center (or delivered by the customer).
  - a. If a customer is one week late in submitting required attendance reports, the Tracker will report this fact to the appropriate Staff but the Tracker will also contact the customer and inform them of the need to get these reports submitted on a timely basis.
  - b. If a customer is two weeks late in submitting their attendance reports, the Tracker will contact the customer and inform them of the need to get these reports submitted and the consequences of not submitting them on time. The Tracker will also inform the Staff of this situation so that the Staff may also encourage the customer to submit attendance reports as required.
  - c. If the customer fails to respond to either the Staff or the Tracker, the Tracker will notify UI staff of this attendance issue and UI staff will take appropriate actions regarding TRA benefits.
2. The tracker will collect mid-term grade reports, semester end grade reports, and schedules for future semesters from TAA customers as required.
  - a. If a customer is one week late in submitting required grade or schedule information, the Tracker will report this fact to the appropriate Staff but the Tracker will also contact the customer and inform them of the need to get this information submitted on a timely basis.
  - b. If a customer is two weeks late in submitting required grade or schedule information, the Tracker will contact the customer and inform them of the need to get this information submitted and the consequences of not submitting it on time. The Tracker will also inform the appropriate Staff of this situation so that the Staff may also encourage the customer to submit the information as required.
  - c. If the customer fails to respond to either the Staff or the Tracker, the Tracker will notify UI staff of this non-compliance issue and UI staff will take appropriate actions regarding TRA benefits.

**C. Follow up with Customers Missing Appointments:** As requested by Staffs, Trackers will contact customers that miss an appointment or miss a workshop to get them re-engaged in New Mexico Workforce Connection services.

1. Staffs should first attempt to contact the customer to determine what happened to cause the missed appointment or workshop. However, after one unsuccessful attempt at contacting the customer, the Staff will provide these customer names to the Tracker who will attempt to follow up and reschedule these customers for additional services (another appointment or another workshop as appropriate).
2. If the Tracker reschedules the customer for an appointment or workshop, the Tracker will inform the Staff of this fact and provide the date and time of the planned appointment/workshop.
3. If the Tracker learns that one of these customers is working, they will report that information in NMVOSS and share it with the appropriate Staff.