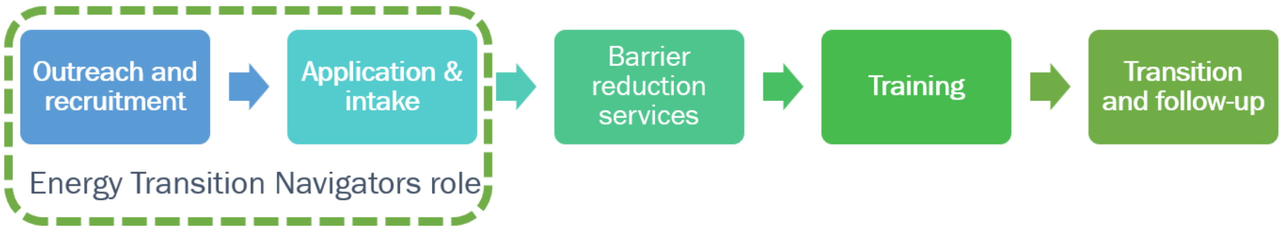
Energy Transition Navigator Program Manual 2024-2025

Chapter 5: Program Application and Intake



Chapter Overview

By the end of this chapter, you will be able to:

- Leverage standardized tools and templates to complete the application process.
- Comply with the application requirements in the CEJA Reporting System.
- Assess and coordinate delivery of barrier reduction services during application
- Provide support and referrals to participants who are not accepted into CEJA Workforce Training Programs.
- Integrate equity values (equity, diversity, inclusion, welcoming, accessibility, and belonging) into your program's culture, each of the program's elements, and each phase of the Pre-apprenticeship Program.

Application Process

The outreach staff's participant application and intake processes are designed to enroll participants who are able and ready to begin the training and start a career in clean energy or the construction and building trades. The application process starts with the prescreening assessment conducted during the Outreach and Recruitment stage of the Pre-apprentice life cycle (see Chapter 4). The Prescreening process (described in Chapter 4) will determine whether the applicant meets eligibility requirements.

Once an applicant is determined to be eligible to participate and ready to enroll, they can begin the application process. The application **must** be completed electronically through the CEJA Reporting System with the assistance of the Energy Transition Navigator or as a paper application. If the application is initially completed on paper, its contents must be entered into the CEJA Reporting System within 48 hours of completion.

The CEJA Reporting System will auto-populate answers from the Prescreening Questionnaire into the application.

Support During Application and Intake Process

Applicants may need short-term support to complete the application and intake process and enroll in the program. They may have barriers that make it difficult for them to attend meetings with outreach and recruitment staff or complete the application. Supports may include:

- Translation services to ensure that they understand the program requirements.
- Bus passes or other transportation expenses to attend meetings or events with outreach/intake staff.
- Support getting a State ID/Driver's license or acquiring personal identification documents (birth certificate, social security card).
- Short-term childcare costs to attend meetings or events with outreach/intake staff.

Energy Transition Navigators may utilize program funds for these short-term support services. The request for the support service must be documented in the CEJA Reporting System using a case note.

Once participants are enrolled in either Climate Works or the CEJA Workforce Hubs program, they will be eligible to receive a wider suite of barrier reduction services from those programs. Make sure to inform potential participants about the barrier reduction services and stipends that will be available to them should they decide to enroll. If they identify barriers to participation, explain that the programs can help them overcome these barriers so that they can participate and succeed. Help them make an informed decision about their participation.

Intake: Career Assessment

After the application, potential participants must complete the initial Career Assessment, which includes questions about the applicant's career goals and ability to complete the training program. The questions in the Career Assessment address the following:

- Current employment status
- Hourly wage
- Employer name
- Start date
- End date (if applicable)
- Job title
- Job duties
- Reason for leaving
- Ability to lift 25-50 pounds
- Ability to stand for long periods

A hard copy of the application can be found in the **Energy Transition Navigator Partner Guide**.

Intake: Service Needs Assessment

Energy Transition Navigator outreach and recruitment staff will then complete a **Service Needs Assessment** with potential participants to identify any barriers that need to be addressed through barrier reduction support services. These barrier reduction support services will be available to participants once they are enrolled in Climate Works or the CEJA Workforce Hubs.

The Service Needs Assessment can be done at the time of the application, or staff can schedule a follow-up appointment. The Service Needs Assessment assesses the need for Wrap-around Support Services and Student Support Services.

- **Wrap-around Support services** help participants address non-academic barriers that may prevent them from participating in the training program or transitioning after the program. These services may include childcare, transportation, tools/equipment, and uniforms, among others.
- **Student Support services** focus on barriers that participants may face during instruction. These services may include tutoring, mentorship, and additional educational testing, among others.

Assessing participant needs for services is critical to the intake process. Within the CEJA Reporting System, grantees will have access to a Service Needs Assessment that will display questions to ask participants and allow grantees to select the barrier reduction services that participants request. The Climate Works and CEJA Workforce Hubs programs will provide barrier reduction services to enrolled participants based on the results of this Service Needs Assessment. The Service Needs Assessment will offer staff guiding questions to follow. Staff will document participant choices to opt into or decline each service need.

The Service Needs Assessment addresses participants' need for the following services:

- Transportation services (bus passes, gas cards, car repairs, etc.)
- Childcare/family member care
- Tools/equipment
- Uniforms
- Technology rentals
- Legal aid
- Driver's education lessons
- Driver's license/ID support and costs
- Comprehensive guidance and counseling, including drug and alcohol abuse counseling, mental health counseling, and violence prevention counseling
- Housing assistance
- Healthcare, including eye care, dental care, physical and mental healthcare
- Needs-related payments
- Other barrier reduction service needs

The Service Needs Assessment will also address participants' need for the following student support services:

- Tutoring, study skills training
- Assistance with educational testing
- Alumni networking
- Mentorship
- Other student support services

All barrier reduction services must be entered into the CEJA Reporting System and tracked. A hard copy of the Service Needs Assessment questions can be found in the **Energy Transition Navigator Partner Guide.**

Note: Though Energy Transition Navigators complete the Service Needs Assessment, they do not provide barrier reduction services to enrolled participants. The CEJA Workforce Hubs or Climate Works grantees will provide these services.

Enrollment Decisions & Workforce Training Program Handoff

After the application and intake assessments have been completed, the CEJA Reporting System will inform the Workforce Hub grantees and Climate Works grantees that there are new referrals.

It is the responsibility of the CEJA Workforce Training Programs to review the applicant's information, the results of the Career Assessment, and Service Needs Assessment and make an enrollment decision.

Note: Enrollment decisions are made by the CEJA Workforce Training Programs (Workforce Hubs or Climate Works). Navigators should not be engaged in enrollment decisions.

During the deliberation period, Energy Transition Navigator staff will maintain communication with the applicant and their CEJA Workforce Hub or Climate Works partners to receive timeline updates.

After the Climate Works grantees and Workforce Hubs grantees make an enrollment decision, they will send participants an Acceptance and Commitment letter, or a Denial letter, that communicates the enrollment decision. Energy Transition Navigator staff are *not* responsible for providing or collecting the acceptance letter, denial letter, or commitment agreement. However, the Workforce Hub Outreach and Recruitment staff or Climate Works Outreach and Recruitment staff **must** alert Energy Transition Navigators of enrollment decisions for potential participants who were referred by the Energy Transition Navigators.

Acceptance. Those who were accepted to the program will fully transition to the Workforce Hub or Climate Works program for instruction. They will receive an official Acceptance and Commitment Letter from the training program with program-specific information such as class schedule, orientation dates/times, and a commitment agreement. This commitment agreement must be signed by the applicant and turned into their program. Energy Transition Navigator staff are not responsible for providing or collecting the commitment agreement. Once the applicant has attended orientation and started instruction, Energy Transition Navigator staff will no longer be required to maintain communication as the applicant would be officially working with the CEJA Workforce Training Program.

Denial. If an applicant referred by the Navigator is not accepted to the program, they will receive an official denial letter from the Climate Works or CEJA Workforce Hub training program. This letter will outline why the applicant was not accepted and provide a list of referrals. Those who receive a denial letter will be referred back to the Energy Transition Navigators. Energy Transition Navigators **must** contact the applicant to discuss the decision and develop an action plan for next steps. These steps may include accessing and applying for alternate programs (such as a community college training program), referrals for services, or help locating employment (for example, referrals to an American Job Center). These steps should be documented as a case note in the applicant's profile in the CEJA Reporting System.

Note: Regardless of an applicant's status in a training program, they can always seek additional assistance or referrals from the Energy Transition Navigator should they decide to participate in a different CEJA workforce program or other workforce program.

Building Rapport with Potential Participants

It is the responsibility of Energy Transition Navigators to cultivate a welcoming and trust-based environment when recruiting participants and helping them apply. Building rapport is essential to building a culture of belonging, inclusion, and collaboration. Building rapport is about fostering connections and cultivating relationships of trust between grantee staff and applicants or participants. The application process is an ideal time to establish rapport with potential participants. When applicants feel they can trust those around them, they can better engage with Energy Transition Navigator staff and later with CEJA Workforce Hub or Climate Works staff.

The ability to build rapport with applicants is a skill like any other. It can be learned, and it can be improved over time with dedicated practice.

Below are some examples of how Energy Transition Navigators can build rapport with potential participants:

- *Supportive communication*
  Use supportive communication that frames applicants as future members of a professional community (the clean energy industry), not just a potential participant in a program. Validate their self-worth, inherent ability, and creativity to help counter "imposter syndrome" and respond positively and affirmatively to their internal questions, "Am I supposed to be here?" "Do I fit in here?" "Can I be successful here?" "Do I belong here?"

- *Self-identification*
  Take the time to learn who the potential participants are and how they self-identify concerning their specific groups. Identify and leverage strengths in diverse potential participants and build on those strengths. Consciously acknowledge all sexes, genders, and ethnicities.

- *Remember Applicant Names*
  This may seem like a small act, but this can be a significant gesture for many. Remembering a potential participant's name can reinforce a sense of belonging.

- *Be Prepared for Applicant Interactions*
  Not being adequately prepared for a meeting with an applicant may make the applicant feel that interacting with them is not a priority. Being on time, greeting applicants, having necessary resources available, and following up after meetings can strengthen connections with applicants.
- *Find Common Experiences or Opinions*
  Enrolling in a training program will be new for many applicants, and finding common connections with applicants further promotes positive connections. Find common experiences or opinions to help root the relationship and provide a shared connection. It is also helpful to foster relationships between applicants and alums. Perhaps applicants are from the same neighborhood or school or cheer for the same sports team. These connections do not have to be deeply rooted; revealing them fosters belonging.
- *Actively Listen*
  Being fully present in conversations means more than being physically present. Building rapport also requires staff to be mentally and emotionally present as well. Some ways to do this during a conversation are to make eye contact with an applicant or ask follow-up questions.
- *Be Aware of Body Language*
  Non-verbal communication is equally, if not more important, than verbal communication. However, at times, it can be misleading, which can cause a rupture in a staff/applicant relationship. Be mindful of the messages being sent by hand movements, facial expressions, vocal tone and volume, and distance from applicants. For example, a staff member who is very passionate might move closer to an applicant, move their hands more, and increase their vocal volume. Their intention may be to communicate excitement, but it may be interpreted as aggressive.

Additional Resources

See the Energy Transition Navigator Partner Guide for:

- CEJA Workforce Training Program Application
- Referral Form