



Clean Jobs Workforce Network Program 2024-25 Program Manual

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 and intake process.
- Comply with the application and intake requirements in the CEJA reporting system.
- Complete tasks related to the intake process, including the Service Needs Assessment.
- Integrate equity values (diversity, inclusion, welcoming, accessibility, belonging, and equity) in the program’s outreach and recruitment strategy) into your program’s application and intake processes.

Application Process

The Clean Jobs Workforce Network Program (or “CEJA Workforce Hub”) participant application and intake processes carried out by the outreach staff are designed to identify and enroll participants who are able and ready to make a career in green energy in an array of industries. The application process starts with the Prescreening Assessment conducted during the outreach and recruitment stage of the participant life cycle (see Chapter 4). The prescreening process (described in Chapter 4) will determine whether the applicant meets eligibility requirements. This process may be carried out by CEJA Workforce Hub outreach and recruitment staff, or by Energy Transition Navigator partners.

Once an applicant is determined to be eligible to participate through the prescreen assessment, they can begin the application process. The application **must** be completed electronically through the Climate and Equitable Jobs Act (CEJA) Reporting System with the assistance of the outreach and recruitment staff or Energy Transition Navigators. Staff may use a paper application with the applicant if needed and then enter the information in the CEJA Reporting System within 48 hours of completion.

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

Supports 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 or complete the application.

Supports may include:

- Translation services to ensure that they understand the program requirements.
- Bus passes or other transportation costs 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.

If the grantee is a Workforce Hub, short-term support services can be offered using barrier reduction funds.

Note: If it is in their approved budget, Energy Transition Navigators can use programmatic funding for support services.

Requests for support services prior to enrollment must be documented in the CEJA Reporting System using a case note.

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 career assessment can be found in the **CEJA Workforce Hubs Partner Guide**.

For potential participants who complete the application process with Energy Transition Navigator partners, their application and career assessment will be available to the CEJA Workforce Hub grantees for an enrollment decision.

Intake: Service Needs Assessment

Outreach and recruitment or barrier reduction staff **must** complete a **Service Needs Assessment** with potential participants to identify any barriers that need to be addressed through barrier reduction support services.

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The Service Needs Assessment can be done at the time of the application, or staff can schedule a follow-up appointment.

Barrier reduction funds can be used for Wrap-around Support Services, Student Support Services, and Transition 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.
- **Transition Support Services** focus on barriers that participants may face as they complete the program and make decisions on employment or further training. These services may include career planning, assistance completing job applications, and job search services, among others.

Note: Transition Support Services will be addressed in more detail in Chapter 8: Program Completion, Transition Services, and Follow-up

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 Service Needs Assessment will offer staff guiding questions to follow. Staff will document participant choices to opt into or decline each service need.

Though this assessment is completed during intake, participants' needs may change throughout the program. As a result, participants can opt into barrier reduction services at any point during their active enrollment in the program. Barrier reduction service staff should regularly reassess participant needs. If participant's needs change, they no longer need a service, or an additional barrier reduction need emerges, it must be recorded in the CEJA Reporting System.

Questions will address 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

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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 **CEJA Workforce Hubs Partner Guide**.

Refer to Chapter 6 for more details on the Service Needs Assessment and delivery of **Barrier Reduction Services**.

Enrollment Decisions and Commitment Letters

The grantee makes a final enrollment decision after the application and intake process is completed. Information about the role of Energy Transition Navigators in this process is discussed later in this chapter. These enrollment decisions must be communicated to the applicant by a formal letter from the program outlining the enrollment decision. Letters may be mailed or emailed.

Acceptance

Applicants are accepted if they meet the program's eligibility requirements and are willing and able to participate with the assistance of barrier reduction supports, if needed. A **CEJA Workforce Hubs Acceptance and Commitment Letter** will be provided to applicants that clearly outlines the enrollment decision and action steps for the participant. The applicant must also be made aware of the date/time for orientation and any critical programmatic information, including the class schedule.

The letter includes a **commitment agreement** that the applicant **must** sign and return before beginning the training or during the orientation. The commitment agreement is a written agreement between the participant and the grantee that clarifies the participant's rights, obligations, and pre-apprenticeship training conditions. The participant and grantee staff must sign the commitment agreement during orientation.

*Note: A copy of the **CEJA Workforce Hubs Acceptance and Commitment Letter** must be uploaded to the **Customer's Profile** in the CEJA Reporting System.*

As part of the commitment agreement, participants are also asked to provide permission to grantees to share information with the CEJA office. This agreement serves as a Family Educational Rights and Privacy Act (FERPA) waiver. The **Family Educational Rights and Privacy Act (FERPA)** is a federal law that affords participants who are 18 years old or who have entered a postsecondary institution at any age ("eligible student") the right to have some control over the disclosure of personally identifiable information from their educational records. The FERPA statute is found at 20 U.S.C. § 1232g, and the FERPA regulations are located at [34 CFR Part 99](#).

Without a signed commitment agreement that includes a FERPA waiver, grantees cannot track participant data in the CEJA Reporting System. Therefore, signing the form is mandatory.

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Note: Refer to the CEJA Workforce Hubs Partner Guide for the CEJA Workforce Hub Acceptance and Commitment Letter template.

Denial

Denial is for applicants who do not meet the eligibility requirements or cannot attend. Grantees will send applicants a denial letter which includes referrals to alternate programs/services. Referrals may include the closest American Jobs Center, other training programs, and/or adult basic education programs. Grantees will then contact the applicant to discuss the decision and develop an action plan for next steps. These steps may include addressing eligibility issues, 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.

Refer to the CEJA Workforce Hubs Partner Guide for the denial letter template and referral.

If a denied applicant is referred by an Energy Transition Navigator, they should be referred back to the Energy Transition Navigators after the denial letter is sent. The Navigator will address next steps and referrals with the applicant (see below).

Withdrawal

In some cases, a grantee will offer acceptance to a participant and that participant will commit to attending the program but never attend instruction. In these cases, the participant is deemed a Withdrawal. If a participant does not attend instruction, grantees must attempt to contact the participant at least two (2) times via phone. If, after two attempts, the participant is still unresponsive or states they are no longer planning to attend, the grantee must update the participant's CEJA Reporting System status to "Withdrawal" through the Program Completion/Follow Up tab and document the call/contact attempts as a case note.

Withdrawals do not count toward a grantee's enrollment metric.

Participant Skimming

In any grant-based program, there is significant pressure to achieve outcome measures to meet the funder's or grant agreement's expectations. This may result in participant skimming. **Participant skimming** is when programs select applicants who are deemed more likely to succeed and may have less need for barrier reduction services. When making enrollment decisions, it is important that grantees make decisions based solely on the applicant's ability to meet eligibility requirements and that the applicant has a primary goal of getting an entry-level clean energy job. An applicant's potential barrier reduction service needs should not be considered unless those needs make them ineligible for the program.

Energy Transition Navigator Coordination

As discussed in Chapters 3 and 4, Energy Transition Navigators will assist Workforce Hubs grantees with outreach, recruitment, application, and intake. Once applicants have completed the Career Assessment, and the Service Needs Assessment, Energy Transition Navigators must alert the CEJA Workforce Hub grantee of pending applications.

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The CEJA Workforce Hubs staff will review the applicant's information and make an enrollment decision. The CEJA Workforce Hub staff will maintain contact with the Energy Transition Navigator staff and the applicant during this process to provide timeline updates.

It is the responsibility of the CEJA Workforce Hubs grantee to provide acceptance and denial letters to applicants and to communicate those decisions to the Energy Transition Navigator staff.

Those who were accepted to the program will fully transition to the CEJA Workforce Hub for instruction. Energy Transition Navigator staff will no longer be required to maintain communication as the participant would be officially working with the CEJA Workforce Hub.

Those who were denied or considered a withdrawal will be referred back to the Energy Transition Navigators. Energy Transition Navigators will contact the applicant to discuss the decision and develop an action plan for next steps. These steps may include how to access and apply for alternate programs, referrals for services, or help locating employment. These steps should be documented as a case note in the applicant's profile in the CEJA Reporting System.

Building Rapport with Participants

Building rapport is essential to creating a program culture that fosters belonging, inclusion, and collaboration. Rapport makes a professional relationship featuring mutual understanding and connection and cultivates a trusting relationship between grantee staff and participants. Intake meetings are ideal for grantee staff to establish rapport with applicants and participants. When applicants and participants feel they have trust and can trust those around them, they can better engage in instruction, barrier reduction services, and career transition.

The ability to build rapport with applicants and participants 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 staff can build rapport with participants.

- *Remember Applicant/Participant Names -*
This may seem like a small act, but this can be a significant gesture for many. Remembering participant's names can reinforce a sense of belonging.
- *Be Prepared for Applicant/Participant Interactions -*
Not being adequately prepared for instruction or participant meetings may make participants feel that interacting with them is not a priority. Being on time, greeting participants, and having necessary resources available or following up after meetings can strengthen grantee staff connections with participants.
- *Find Common Experiences or Opinions -*
Enrolling in a program like Climate Works will be new for many participants, and finding common connections with participants 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 participants and alums. Perhaps students 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.

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- *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 a participant 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/participant relationship. Grantee staff need to be mindful of the messages being sent by hand movements, facial expressions, vocal tone and volume, and distance from participants. For example, a staff member who is very passionate might move closer to a participant, move their hands more, and increase their vocal volume. Their intention may be to communicate excitement, but it may be interpreted as aggressive.

While rapport building is important during intake, these behaviors and activities must extend to the delivery of all program elements. It is the responsibility of all staff to cultivate a welcoming and trust-based environment.

Additional Resources

See the CEJA Workforce Hubs Partner Guide for:

- Program Application
- Career Assessment
- Service Needs Assessment (hard copy)
- Sample Referral Form
- Acceptance Decision Letter
- Denial Decision Letter