

**NORTEC
POLICY STATEMENT
BUSINESS SERVICES REPORTING**

Last Updated: October 18, 2016

PURPOSE

The purpose of this policy is to provide guidelines to the Service Providers (NoRTEC Subcontractors) for the purposes of quarterly Business Services Reports. It is in the interest of the Workforce Development Board (WDB) and Governing Board (GB) to be informed of the number of business served and the various business services provided in each of the NoRTEC service delivery areas.

REPORTING FORMAT/DEFINITIONS

Business Services reports shall contain data for a program year, beginning on July 1 and ending on June 30. Reports shall be submitted each quarter, five days after the end of the quarter¹:

- First Quarter (July 1-September 30) – Report due October 5
- Second Quarter (October 1-December 31) – Report due January 5
- Third Quarter (January 1-March 31) – Report due April 5
- Fourth Quarter (April 1-June 30) – Report due July 5

Attachment A contains a sample template of the report. Each quarter's report will contain cumulative numbers, beginning on July 1 of each program year through the end date of the quarter being reported.

Following are definitions associated with each of the required data elements contained in the report:

- 1. Total Employers Served** – Each employer receiving at least one service, counted only once each program year and reported cumulatively for each quarter.
- 2. Total Number of Business Services** – Each discrete business service provided to employers, counted only once, and reported cumulatively each quarter. Business services include a wide array of activities, including, but not limited to, prescreening²

¹ If the due date of each quarterly report falls on a holiday or weekend, the report will be due by close of business on the next business day.

² A prescreen for an open position shall only be reported as a single business service, regardless of the number of applicants screened. For example, if 20 applicants were prescreened for a single position, this would be counted as one business service. If the employer requested prescreens for multiple positions, each position prescreened for may be counted as a business service.

applicants for an open position, assistance with employee handbooks, customer service training, salary and compensation analysis, labor market and demographic analysis, posting job orders, customized recruitments, applicant testing, assisting with interviews, workshops³, seminars, etc.

3. **New Positions Filled** – Each position successfully filled for an employer that was a “new” position (either because the business/organization is new, or it has created a position **not** formerly held by a previous employee).
4. **Existing Positions Filled**⁴ – Each position successfully filled for an employer that was previously held by a former employee.
5. **Financial Assistance for Employee Training** – Each **employee** placed with an employer via an OJT, WEX, internship, customized training or any other employed worker training.
6. **Rapid Response Assistance** – Each employee, impacted by a business closure or significant layoff, who receives a rapid response service.

In addition to the required data elements defined above, quarterly reports shall also include a narrative section. This narrative allows Service Providers to include details describing the business services reported. This includes the opportunity to share information about job fairs, large recruitments, customized trainings, etc. Multi-county Service Providers may break out activity by county in the narrative section of this report, if desired.

MONITORING

Verification of the reporting of data elements and narrative information shall be reviewed by NoRTEC during on-site program monitoring reviews and via desk review.

POLICY EXCEPTIONS

Service Providers (NoRTEC Subcontractors) may make exceptions to this policy only with prior written authorization from the NoRTEC Administrative entity.

³ Each workshop provided to an employer shall only be counted as a single business service. For example, if a workshop on Sexual Harassment Prevention is provided to one or more employees of a single business, this would be reported as a single business service. If, however, a seminar (e.g., Cal OSHA, Unemployment Insurance for Employers, etc.) is hosted/sponsored by a Service Provider for a group of employers, then each employer/business attending the seminar would be counted as a discrete business service.

⁴ For both new and existing positions filled (Items 3 and 4), only those positions for which the Service Provider provided the employer with recruitment services shall be counted. If a participant is placed in a position for which the Service Provider did not specifically recruit for the employer, a business service shall NOT be reported as this is a **job seeker service** not a **business service**. **Recruitment** is more than just posting a job with an employer—the employer must have contacted the Service Provider and requested recruitment assistance.

BUSINESS SERVICES REPORT

Service Provider: XXXXXXXX

Program Year: July 1, 20XX – June 30, 20XX

Data Element	Qtr Ending 09/30/XX	Qtr Ending 12/31/XX	Qtr Ending 03/31/20XX	Qtr Ending 06/30/XX
Total Employers Served				
Total Number of Business Services				
New Positions Filled				
Existing Positions Filled				
Financial Assistance for Employee Training				
Rapid Response Services				

Narrative for the Quarter Ending 09/30/20XX: