



## Energy Transition Navigator Program 2024-25 Program Manual

# Chapter 4: Outreach and Recruitment

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## Chapter Overview

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

- Describe the role of outreach and recruitment in the success of the Energy Transition Navigator Program.
- Leverage outreach and recruitment resources, methods, templates, and tools to create a pipeline into the CEJA Workforce Programs.
- List the types of contact statuses.
- Track outreach and recruitment efforts in the CEJA Reporting System.
- Integrate and uphold the six core equity values (diversity, inclusion, welcoming, accessibility, belonging, and equity) in the program's outreach and recruitment strategy.

## Outreach and Recruitment Basics

Energy Transition Navigators (also known as Navigators) are responsible for conducting outreach and recruitment.

**Outreach** activities are focused on communicating with potential participants, stakeholders, organizations and community members to generally raise awareness of the program and provide information about clean energy career opportunities. It includes marketing and is intended to widen participation for the program.

**Recruitment** activities are focused on attracting interested in qualified individuals to submit an application for the program. Recruitment efforts focus on the target populations and encouraging them to submit an application for one of the following CEJA programs:

- The Climate Works Pre-apprenticeship Program (Climate Works)
- The Clean Jobs Workforce Network Program (CEJA Workforce Hubs)

Navigators can refer contacts to other workforce programs if the CEJA programs are not an appropriate fit. Effective outreach creates a constant flow of leads. **Leads** are individuals who are interested in enrolling in a training program. The aim is to funnel leads through the screening process and transform qualified individuals into applicants.

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Navigators provide outreach and education to inform individuals, communities, and businesses about the larger CEJA workforce ecosystem (see below). Navigators also inform business owners about opportunities available to them through the contractor support programs.

CEJA Workforce Programs	CEJA Contractor Programs
<ul style="list-style-type: none"><li>• CEJA Workforce Hubs</li><li>• Climate Works</li><li>• Returning Resident Clean Jobs Program</li><li>• Energy Transition Navigator Program</li></ul>	<ul style="list-style-type: none"><li>• Contractor Incubator Program</li><li>• Primes Contractor Accelerator Program</li></ul>

Outreach and recruitment efforts signify the first level of connection between potential participants and the CEJA workforce programs. It is essential that during these efforts, grantees can articulate not only the program requirements, but also the opportunities the program offers. For many potential participants, this may be the first time they have heard about clean energy careers or the benefits of clean energy job opportunities. Navigators will raise awareness of clean energy job opportunities, why they matter, and why we want qualified individuals in the industry. In addition to the extensive efforts provided by the Navigators, grantees should also plan to conduct outreach and recruitment activities, and disseminate materials that highlight the goals, components, and core values of CEJA.

Outreach activities should emphasize the goal of diversifying the clean energy industry and promote an environment of collaboration, innovation, and resilience where participants' unique experiences and backgrounds are valued. Additionally, outreach and recruitment materials should highlight the needs of potential participants and how the grantee's program will help them overcome barriers. Prospective participants should be informed that they will receive a stipend during their training, that services are available to reduce barriers to participation (such as transportation and childcare), and that support services will continue into their initial placement in a job or apprenticeship, if needed.

Outreach and recruitment are critical to the success of the program. Navigators will be responsible for working closely with the grantees of the Climate Works Program and the CEJA Workforce Hubs to coordinate outreach and recruitment. Climate Works Centers and Workforce Hubs will accept applicants from Navigators while also conducting their own outreach. Close cooperation is required for the effective use of resources.

Grantees should develop a comprehensive communication strategy that raises the general awareness of the CEJA workforce ecosystem to widen participation in all CEJA workforce programs. This includes marketing for program awareness and intake, actively listening to community members, community engagement, partnership development, and building trust. Building these types of partnerships helps to mitigate the skepticism of government that may exist in many underrepresented communities. Creating trust is crucial to enrolling participants in the program.

A large component of outreach will include the execution of an effective marketing plan that allows grantees to set goals, dedicate resources, and track progress. All grantees will be required to submit a

marketing plan to their grant manager. Marketing plans and materials are discussed in greater detail in the following subsections. Marketing materials should reflect the six core equity values discussed in Chapter 2, and materials should not exclude—explicitly or implicitly—anyone.

*Note: Implicit bias training is recommended for all Outreach and Recruitment staff to increase knowledge and insight before actively participating in outreach and recruitment activities.*

The goal of outreach is not just to raise awareness and build trust, but to recruit qualified participants, help them complete the pre-assessment, and enroll in the program.

### Target populations

Outreach and recruitment strategies must be holistic and inclusive of all Illinoisans, including “equity focused populations,” which are defined as:

- Persons residing in equity investment-eligible communities\*
- Low-income persons
- Persons who identify as black, indigenous, and people of color
- Formerly incarcerated persons
- Persons who are or were in the child welfare system.
- Displaced energy workers
- Dependents of displaced energy workers
- Women
- LGBTQ+, transgender, or gender nonconforming persons
- Persons with disabilities

*Note: To identify equity investment eligible communities, see the [CEJA Grantee Map](#), which defines the areas that are environmental justice and/or R3 (Restore, Reinvest, and Renew) areas. These eligible areas are the geographic areas throughout Illinois that would most benefit from equitable investments by the State, designed to combat discrimination and foster sustainable economic growth.*

### Participant Eligibility

**Not all members of equity focused populations described above will be eligible to participate in Climate Works or the CEJA Workforce Hubs.** Determining participant eligibility is part of the prescreening and application process and is discussed in Chapter 5. Navigators should not exclude or neglect to recruit certain populations because they fear they will be ineligible to participate. Eligibility is based on multiple factors and is determined during the prescreening process.

Energy Transition Navigators should have a clear understanding of the eligibility criteria for each of the CEJA programs to help them focus their outreach efforts. For example, formerly incarcerated people meet eligibility criteria for all of the CEJA workforce programs, so reaching out to reentry organizations may be a great way to find eligible participants. The key differences in participant eligibility are highlighted in the table below.

**Table 1: CEJA Program Eligibility Criteria**

Program	Geographic eligibility	Other eligibility	Age	Other requirements
Climate Works Pre-apprenticeship	Anyone living in an EJ and/or R3 community	Formerly incarcerated people; Current or former foster care members	16 or above (or will be 16 by the time they complete the program)	Must either have a diploma or equivalent or be enrolled in a program where they are working towards one.
CEJA Workforce Hubs	Prioritize placement as follows, where applicant pool allows: 1/3 people living in BOTH EJ and R3 community; 2/3 people living in EITHER EJ or R3 community	Preference and priority for people with barriers to employment*, current or former members of the foster care system, displaced energy workers	18 or above (or will be 18 by the time they complete the program)	N/A
CEJA Contractor Incubator Program	Prioritize placement as follows, where applicant pool allows: 1/3 business owners living in BOTH EJ and R3 community; 2/3 business owners living in EITHER EJ or R3 community	Preference for business owners who have barriers to employment*, current or former members of the foster care system, displaced energy workers	18 or above (or will be 18 by the time they complete the program)	N/A

*\*Barriers to employment include low educational attainment, involvement in the justice system, and language barriers.*

### Participant Prioritization for CEJA Workforce Hubs

CEJA Workforce Hubs have requirements for prioritizing participants, based on geography and other factors. The Climate Works Program does NOT have these prioritization requirements. Outreach and recruitment staff should pay close attention to these requirements when conducting outreach to communities in their area. Outreach and enrollment outcomes will be tracked to determine if grantees are meeting these prioritization requirements. Outreach strategies should be adjusted, as needed, to meet the placement prioritization requirements.

Placement priorities, where the applicant pool allows, are as follows:

- One-third (1/3) of placements should be prioritized for individuals living in a community that is BOTH an EJ and an R3 community.
- Two-third (2/3) of placements should be prioritized for individuals living in EITHER an EJ or R3 community (this may include the initial 1/3 that live in BOTH an EJ and R3 community).

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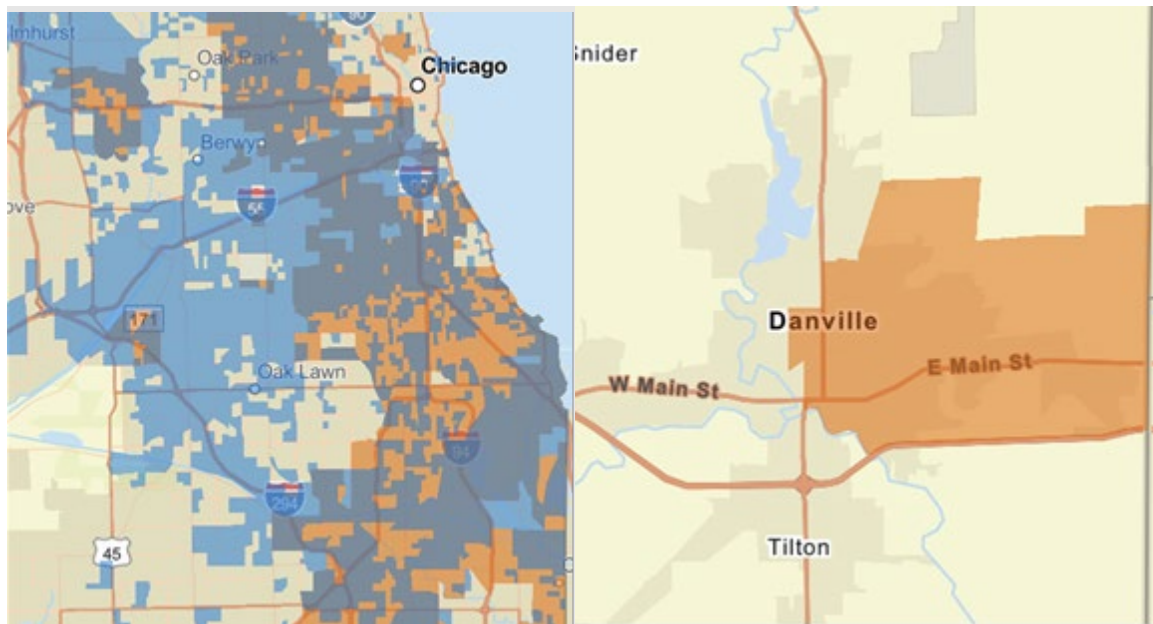
- Within these prioritized geographic regions, placements should be prioritized for people with barriers to employment (see below), people who are current or former members of the foster care system, and displaced energy workers.
- The remaining placements should be prioritized for people with barriers to employment (see below), people who are current or former members of the foster care system, and displaced energy workers.

### Geographic Prioritization

The CEJA legislation indicates that the geographic prioritization for the CEJA Workforce Hubs is required “where the applicant pool allows.” This geographic prioritization is feasible in some regions, but not in others. See the CEJA Grantee Map: <https://dceo.illinois.gov/ceja/map.html>. For example, Chicago (below, left), has areas that are BOTH EJ and R3 communities and areas that are EITHER EJ or R3 communities.

*Note: The blue sections are EJ communities, the orange sections are R3 communities, and the grey sections are both EJ and R3 communities.*

In contrast, Danville (below right) only has R3 communities (section in orange). It does not have any EJ communities, nor does it have any areas that are both R3 and EJ communities.



If a grantee’s region has few or no areas that are BOTH R3 and EJ communities, outreach and recruitment staff should focus on conducting outreach in EITHER R3 or EJ communities. If geographic placement priorities cannot be met, grantees may also focus on recruiting the other target populations outlined in the legislation: people with barriers to employment, people who are foster care members or alumni, and displaced energy workers. Take time to understand regional’s needs is critical when developing an outreach plan and setting outreach priorities.

### Prioritization for People with Barriers to Employment

Prioritization for people with barriers to employment, for the CEJA Workforce Hubs Program includes, but is not limited to the following three categories of people:

1. People with prior involvement with the criminal legal system, defined as an adult
  - a. who is or has been subject to any stage of the criminal legal process, and for whom services may be beneficial; or
  - b. who requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.
2. People with language barriers, defined as an adult
  - a. who is an English language learner; or
  - b. who has low literacy skills, meaning a person who computes or solves problems, reads, writes, or speaks at or below the 8<sup>th</sup> grade level or is unable to compute or solve problems, read, write, or speak at a level necessary to function on the job, in the individual's family, or in society.
3. People with low educational attainment, defined as an adult who does not have a high school diploma or equivalent.

Prioritization for people with other barriers to employment should be discussed with your Grant Manager or Regional Administrator.

### Geographic Territory

CEJA Workforce Hubs are required to serve the designated hub cities as well as the larger surrounding areas. For instance, the Decatur Hub may serve participants in Springfield as well. The CEJA programs are intended to provide workforce training opportunities for eligible individuals throughout the state, regardless of whether they are near a hub training location.

Within the grantees' service territory, it may be appropriate to focus outreach efforts on those equity investment eligible communities that are near your training location, but do not exclude those communities that are in the surrounding areas. For potential participants that live further away from training locations, outreach and recruitment staff should inform them that barrier reduction services can be used to address the costs of commuting to training locations (e.g., gas cards, car repairs, bus passes).

At this time, DCEO has not determined geographic boundaries between hub regions. When applying for funding, grantees were invited to propose the geographic territory and target communities they intended to serve—including the designated hub city and surrounding areas. As needed, DCEO may facilitate negotiations between grantee teams to establish boundaries between hub regions.

### Program Similarities and Differences

Some potential participants may be interested in both the Climate Works Program and the CEJA Workforce Hubs. The Energy Transition Navigators will play a vital role in informing potential participants about the key elements of each program so that they can make informed decisions about which program to enter.

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Below is a summary of the key differences between the two programs. Find out what job-specific training options will be offered at the CEJA Workforce Hub in your region so that you can provide information about these training programs to potential applicants.

*Note: Each CEJA Workforce Hub will offer a different selection of job-specific training options.*

Both programs offer substantial barrier reduction services to participants to remove barriers to entry and completion (see table below for examples). Energy Transition Navigators should provide information about these barrier reduction services and let them know that they will have an opportunity to opt in to these services when they begin the program. They can also opt in to these services at a later date if their support needs change.

**Table 2: CEJA Program Comparison**

	Climate Works	CEJA Workforce Hubs
Program goal	Placement in a registered apprenticeship program in the construction & building trades	Placement in an entry-level clean energy job.
Program length	150-300 hours	200-500 hours (depending on job-specific training options offered)
Content covered	Construction basics, with a clean energy focus; essential employability skills	Bridge program: Essential employability skills and clean energy basics  Job-specific training options: Will depend on what the specific hubs offer, such as solar, wind, energy efficiency
Certifications	NABTU MC3 or NCCER Core Construction Certificate; OSHA 10; First Aid/CPR	OSHA 10; First Aid/CPR  Other job-specific certifications (such as NABCEP PV Associate exam or NATE ready to work certifications)
Barrier reduction services	Transportation, childcare, stipends, resources to meet basic needs, tutoring, mentoring, assistance identifying and applying to apprenticeship programs, follow-up support after placement to aid retention	Transportation, childcare, stipends, resources to meet basic needs, tutoring, mentoring, assistance identifying and applying to jobs, follow-up support after placement to aid retention

## Outreach and Recruitment Tools

Outreach and recruitment tools aid in creating and implementing strategies that generate participant leads, resulting in the submission of applications and enrollment of eligible and qualified candidates into the CEJA workforce programs.



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The following recruitment and outreach tools can help support your recruitment goals.

### Marketing Plan

A marketing plan is a critical tool for successful outreach. A comprehensive **marketing plan** should outline the target audience, a list of communication channels that will be utilized, a timeline for when marketing and communications will be distributed, and the accountable staff assignments.

Grantees will be required to submit a marketing plan and budget to their Grant Manager. See the Energy Transition Navigator Partner Guide for a marketing plan template.

### Pre-Designed Marketing Materials

Energy Transition Navigators, as part of the overall CEJA ecosystem, will utilize a standard CEJA marketing brand. A unified CEJA marketing brand supports the promotion of the DCEO CEJA programs, unifies the different programs in the CEJA ecosystem, and reduces public confusion about programs.

Because the CEJA programs are delivered by many different organizations, marketing materials will need to be “co-branded” with the CEJA brand and the grantees’ organization’s brand.

When it comes to marketing the Climate Works or CEJA Workforce Hubs programs for outreach and recruitment, grantees have two options:

1. Utilize program pre-approved, designed outreach materials, including fliers, fact sheets, posters, and presentations.
2. Design custom outreach materials, co-branding them with the approved CEJA logo and messaging.

Program pre-approved materials are designed by the DCEO CEJA communications team. They can be co-branded by adding the grantees’ organization’s logo and contact information to direct individuals to their specific program. They have predefined areas to insert grantees’ the organization’s name, logo, and contact information. They are readily accessible to grantees for immediate use. These are pre-approved and can be modified and printed at the grantees’ convenience. They do not need to be approved by a Grant Manager.

To access pre-approved, designed materials, visit the Energy Transition Navigator Partner Guide. Click on the CEJA Design Templates document under "Chapter 4 Outreach" to access the design files and edit them directly.

Grantees’ can add their organization’s logo and contact information to these pre-approved materials, by either editing the documents using Adobe Acrobat, similar software, or through Canva. Grantees will need to create a free account to access and edit the files using Canva. Please only edit the sections of the documents that provide information about the grantees’ organization or details about specific regional programs (such as when the training will be offered).

Pre-designed materials include:



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- Program fliers in English and Spanish. You can add your contact information to the template and print it out for distribution.
- General CEJA Poster and CEJA Flier in English and Spanish. These can be utilized by Energy Transition Navigators who are recruiting for multiple CEJA programs. Grantees can add their organization's contact information to the template to direct people to their program.
- Program Information Sheets in English and Spanish. These can be edited with specific information about the programs in your region.

### Creating Custom Designed Materials

If grantees decide to create custom-designed materials to promote the CEJA programs (beyond the pre-approved designed materials described above), there are requirements that **must** be follow when designing materials.

DCEO allows grantees to create the following custom designed materials and co-brand them with the CEJA logo and messaging.

**Table 3: Allowable Materials for Custom Design and Co-branding**

Materials that can be custom designed and co-branded	Materials that cannot be co-branded with CEJA logo
<ul style="list-style-type: none"><li>• Fliers and brochures</li><li>• Postcards and mailings</li><li>• Posters, banners, or displays</li><li>• Back of business cards</li><li>• Webpages describing your program</li><li>• Videos or television spots</li><li>• Email blasts</li><li>• Presentations</li><li>• Social media</li><li>• Clothing</li><li>• Promotional items or giveaways</li></ul>	<ul style="list-style-type: none"><li>• Invoices, quotes, receipts</li><li>• Vehicles</li><li>• Identification badges</li></ul>

*Note: ALL co-branded materials that you have custom designed must be submitted to your Grant Manager for approval prior to printing or production. Failure to follow these co-branding guidelines may result in disciplinary action. Grantees will not be reimbursed for unallowable costs.*

### Using the CEJA Logo

Grantees may only use the approved CEJA logo to represent their involvement in the CEJA Illinois programs. Use of any other CEJA or DCEO logo is strictly **prohibited**. The approved CEJA logo is available in English and Spanish and can be found in the Energy Transition Navigator Partner Guide, under the Chapter 4: Outreach section.

The approved CEJA logo should be formatted as follows:

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- In marketing the CEJA programs, the CEJA logo should come *before* the organization logo and be as big or bigger than your organization logo (exception: organizational webpages, business cards).
- Clear Space: Leave a minimum amount of clear space around the perimeter of the approved graphic equivalent to the height of the letter “C” in CEJA.”
- Background: The approved graphic should always stand out clearly from the background.
- Adjustments: Do not redraw, alter, strengthen, tilt, rotate, or distort the approved graphic. Do not modify the colors of the approved graphic.

To ensure a high-quality appearance, please adhere to the following resolution guidelines for the approved graphic:

- Print: 300 dpi at the size that it will be used
- Web: 72 dpi at the size that it will be used
- In presentations: 150 dpi at the size that it will be used

### Messaging

In the text of these custom-designed materials, grantees may choose from the following phrases or similar language to describe themselves:

- A Partner of CEJA Illinois
- [Organization name] is a Partner of CEJA Illinois

Messaging that describes the CEJA programs will need to be approved by the Grant Manager to ensure that it aligns with CEJA policies and practices. The pre-approved materials described above provide examples of messaging that can be used to describe the CEJA programs.

### Clean Energy and Apprenticeship Career Resources

Many individuals are unaware of what a “clean energy job” is, especially in communities that have been left out of the clean energy transition. Members of these community may not know anyone with a clean energy job or may not understand that certain workers, such as electricians and plumbers, are part of the clean energy workforce. Part of the role of the Energy Transition Navigator is to educate individuals about clean energy job opportunities and to help create excitement.

In addition to the fliers and information sheets, Navigators may want to provide information about clean energy jobs and partner with clean energy employers so that potential participants can see clean energy workers in action.

Be sure to share the benefits of clean energy jobs which include:

- They are in high demand—and expected to grow a lot in the next few years.
- They generally pay well and provide benefits.
- They help to make our communities stronger.
- They often save people money and make buildings more comfortable.
- They help us combat climate change.
- The education/training requirements for most clean energy jobs are not that high.

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- There are lots of opportunities to grow in your career.

Prospective applicants may need to learn what an apprenticeship is or develop a greater understanding of what a clean energy job entails. Below are a few resources to help provide information about apprenticeships and clean energy careers.

- [Apprenticeship USA](#) has information and videos that highlight the benefits of apprenticeships.
- [Apprenticeship Illinois](#) has information about what an apprenticeship is and includes videos, success stories, and maps of apprenticeship programs in Illinois.

Here are a few videos and other resources that can be used to raise awareness and generate excitement about clean energy jobs in the construction industry:

- [Construction Careers Overview](#) (CareerOneStop)
- [Energy Careers Overview](#) (CareerOneStop)
- [Solar PV Installers Career](#) (CareerOneStop)
- [Energy Auditors/Weatherization Workers](#) (CareerOneStop)
- [HVAC Careers](#) (CareerOneStop)
- [Solar Careers](#) (IREC)
- [Faces of Energy Efficiency](#) (e4thefuture.org)
- [Learn about Clean Energy Jobs](#) (Clean Jobs Midwest)

Outreach and Recruitment staff must be able to “sell” the clean energy and construction industry by providing job specific information, such as the salary and educational/training requirement. Here are a few resources on jobs related to clean energy in the construction and building trade industry:

- [Electrician](#)
- [Carpenter](#)
- [Roofer](#)
- [Plumber](#)
- [HVAC Mechanics and Installers](#)
- [Construction Laborer](#)
- [Energy Auditor](#)
- [Structural Iron and Steel Worker](#)
- [Insulation Worker](#)
- [Electrical Power-line Installers and Repairers](#)

## Outreach and Recruitment Methods

The following best practices have been collected from academic sources, interviews with local workforce representatives, recruiting toolkits, and other resources.

Outreach and recruitment methods must be coordinated with the Energy Transition Navigators Program to avoid inefficiencies and to promote greater information sharing, community outreach, community engagement, and ultimately program interest among potential participants.

### Outreach Team

To continue upholding the core **equity values** defined in Chapter 2, include individuals on the outreach and recruitment team that are committed to these ideals. Consider including staff and employees from underrepresented groups (e.g., women, people of color, and veterans). When potential participants can relate to and identify with recruiters, they may feel more comfortable applying for the pre-apprenticeship program.

### Community Organization Partnerships

Build partnerships with organizations who have access to targeted underserved populations. Partners may provide informal benefits like mutual information sharing, introductions to trusted contacts, event marketing, or hosting. Entities expected to play a partnership role throughout the program should begin by proactively supporting the recruitment process. Examples of partnering organizations and agencies include the Department of Human Services, American Job Centers, Local Workforce Innovation Boards, high schools, community colleges, community centers, nonprofit organizations, community organizing groups, local housing authorities, Head Start programs, faith-based organizations, and advocacy organizations. Engaging with high school counselors will be vital to providing seniors with viable career exploration and work opportunities before or after graduation. Work with the staff of these various entities to introduce the pre-apprenticeship program during regularly scheduled meetings in which potential participants will be present.

To reach returning residents, consider contacting transition houses or reentry organizations. [Reentryillinois.net](https://reentryillinois.net) provides a searchable directory of reentry and housing organizations throughout the State. Also, consider contacting family advocacy centers to reach foster care alums. Veterans' organizations are an excellent resource for recruiting veterans and transitioning service members.

### Diverse, Easy-to-Read, and Multilingual Marketing Material

Marketing is all about **effective communication**. Therefore, marketing materials must be easy to read and understand. Highly technical and complex jargon must not be used. Also, information must be shared in languages other than English to recruit members from underserved groups with limited English proficiency.

Photos and images should feature diversity in terms of race, ethnicity, gender, and age. When marketing materials feature people who look like potential participants, they can visualize themselves in the program.

Grantees may use the pre-designed marketing materials, which feature diverse participants and easy-to-read material in both English and Spanish, or they may create their own. Any custom-designed marketing materials must be co-branded and approved by your Grant Manager (see above).

### Landing Page on Organization Website

Organization websites are one of the first locations where potential participants will seek program information. There should be a dedicated landing page for the CEJA Workforce Hubs and Climate Works Programs that clearly outlines program goals, requirements, application processes, downloadable information sheets, and other key information. This page should also be linked and included in social media posts or other outreach/recruitment materials.

### Career Fairs

Career Fairs often occur at high schools, community colleges, or community centers and offer a prime opportunity to access a group of individuals seeking to start or change careers. Some career fairs may charge a small fee or offer registration at no cost. Contact local partners and request to be included in upcoming or annual career fairs. Often, these fairs coincide with graduation dates in late spring/early summer.

### Open House Events

Host an open house event and invite potential participants, partners, and staff from other community or training organizations and local government representatives. These events create an ideal opportunity to discuss the pre-apprenticeship program offerings, inform potential applicants about the career opportunities provided by the clean energy industry, and collect potential participant information for future follow-up. Inviting pre-apprenticeship and DOL-registered construction apprenticeship program alumni to share their experiences may create a sense of belonging and inclusion for potential participants.

At a minimum, the open house agenda should include:

- Suggested times.
- An outline of the program.
- Contact information for the program coordinator.

For more information on how to run a successful open house, see the sample open house agenda and tips in the Energy Transition Navigator Partner Guide.

### Public Service Announcements (PSAs)

Many local television, radio, and print media outlets will air information for free, as a public service announcement about the program. Contact local media outlets to ask about this service. Public Service Announcement content must be pre-approved by the grantee's Grant Manager.

### Social Media Platforms

**Advertise** and **market** on social media platforms based on potential participants' and target populations' platform usage. Remember that social media requires substantial staff time and continuous monitoring and posting to yield results. Grantees should carefully determine their staffing and organizational capacity before launching a social media marketing campaign. Social media can be effective when executed thoughtfully.

Among the most popular social media platforms are Instagram, Facebook, YouTube, TikTok, X (formerly Twitter), LinkedIn, and Instagram. Each of these creates an opportunity to connect with your target population.

Several pre-approved social media messages and graphics are included in the Energy Transition Navigator Partner Guide. Any additional social media messaging must be approved by the grantee's Grant Manager.

**Table 1: Social Media Marketing**

<b>Facebook</b>	Facebook is the most popular social network, but mostly used by older users. It has a user-friendly interface in which organizations can track page statistics and engagement. The platform allows contests and competitions, marketing of upcoming events, and fundraising, among other business-related tasks.
<b>YouTube and TikTok</b>	YouTube and TikTok are great ways to interact given that videos garner higher engagement than text or photos. These platforms can be ideal places to post short fundraising videos featuring participants and stakeholders. Organizations can track views and subscribers to determine effectiveness.
<b>X (Twitter)</b>	X (formerly Twitter) remains a popular platform. All updates are posted in real-time, and you can post new content frequently. Send and respond to messages privately to address complaints or questions. Bear in mind that you are only allowed 280 characters per message, and everything is shared chronologically, meaning older posts can easily be missed by your audience.
<b>LinkedIn</b>	LinkedIn promotes professional engagement, networking, and career development. It allows job seekers to post their CVs, potential employers to see their individual profiles, and apply to job listings.
<b>Instagram</b>	Instagram is a photo and video sharing social networking service. It allows users to edit and upload photos and short videos through a mobile app. Note that sharing must be done from a mobile device, though messaging and comments can take place on a desktop.

### Word of Mouth Recruitment

This is one of the most effective ways of recruiting potential participants into CEJA workforce programs. Encourage word-of-mouth marketing among equity investment eligible individuals who have participated in the CEJA workforce programs.

### On-the-ground Street Outreach

Create a recruitment team that literally “meets potential participants where they are.” The team must consider visiting equity investment eligible communities to recruit potential participants. This practice is especially beneficial for participants who experience transportation and childcare barriers to employment. This type of outreach method creates a window of opportunity to serve individuals who may be interested in pre-apprenticeship programs but have obstacles that may impede their ability to visit program centers. Obstacles can be addressed with specified wrap-around services once they participate in the program. Outreach and Recruitment staff conducting street outreach should partner with their supervisors to plan for safety during scheduled activities.

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Develop **safety guidelines** for street outreach which may include, but not be limited to the following recommendations:

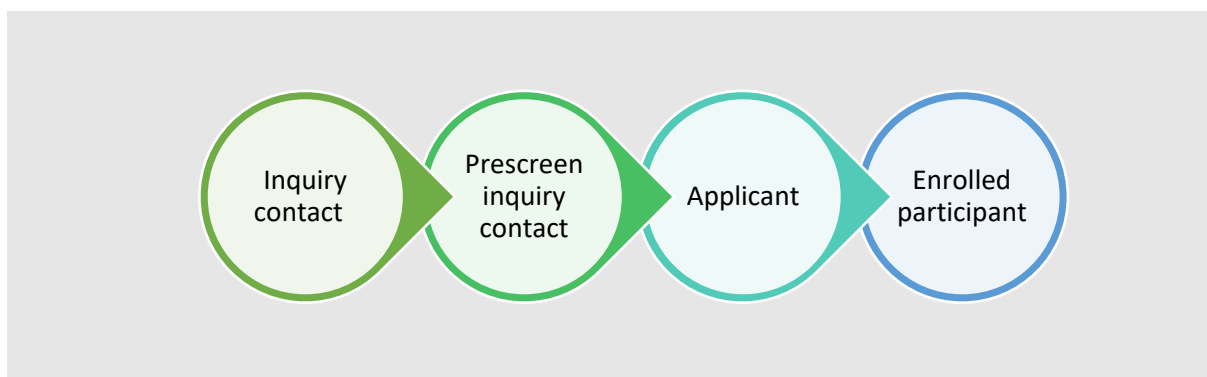
- Always use the buddy system. Staff members should conduct street outreach activities in groups of two to four and never alone.
- Always identify yourself and your employer, introduce the team, and inform community members about your work.
- Always inform on-call supervisors and/or other staff members of your exact location.
- Alert the on-call supervisor and/or other staff members at the beginning and end of each shift.
- Always remain in well-lit and designated areas.
- Become familiar with and surveil the area before conducting activities.
- Avoid confrontation or debate of any kind.
- Inform the supervisor of any unusual developments, questions, or concerns.
- In case of an emergency, call or have another person call 9-1-1.

### Avoid Participant Skimming

In any grant-based program, there is significant pressure to achieve enrollment metrics to meet the expectations of the grant agreement. This may result in unintended participant skimming. **Participant skimming** is when programs select applicants deemed more likely to enroll or succeed and may need less barrier reduction services. When making outreach and recruitment decisions, it is essential that grantees do not limit the applicant pool through their perceptions of potential applicants.

## Moving Contacts from Inquiry to Application

Energy Transition Navigators are responsible for helping people who express interest in the CEJA workforce program apply to one of the programs. There are several steps that must be taken on the path from interest to enrollment. Potential participants are classified into different categories depending on where they are along this path. The categories inform the follow-up action steps, dictate the pace of the intake process, and impact the amount of follow-up recommended.



**Inquiry contact:** Individuals who have shown interest in participating in a CEJA workforce program. They might have responded to social media marketing or other recruitment and outreach activities, and program staff have had some contact with them.



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**Prescreen inquiry contact:** Individuals who have taken the next step to complete the Prescreening Assessment with outreach and recruitment staff. Outreach and recruitment staff may help individuals complete the Prescreening Assessment at their initial contact or may follow up with them later to complete it. The Prescreening Assessment will let them know if they are eligible to participate and advance to the application phase.

**Applicant:** Individuals who have started or completed the application process (see Chapter 5).

**Do not contact:** Individuals who have definitively expressed a lack of interest in being a CEJA workforce program participant or did not pass the prescreening eligibility check. This participant may be referred to other programs.

**Enrolled participant:** An individual who has completed the application and intake assessments and has started receiving services (see Chapter 5).

Moving individuals from inquiry contacts to enrolled participants takes consistent and strategic communication with potential applicants, referred to as touches. A **touch** is any communication opportunity that motivates qualified individuals to apply. Most outreach and recruitment activities are a touch, including:

- a grantee presentation/webinar
- phone call or text
- flyer or newsletter
- email
- postcard
- social media post
- face-to-face conversation

Though the data varies, converting an inquiry contact into an enrolled participant can take between six to eight touches. However, nearly 90 percent of organizations and businesses stop trying by the third or fourth touch. Navigators should not view the third or fourth touch as a failed attempt. Instead, these touches should be considered a “countdown” to the application process.

## Contact Tracking in the CEJA Reporting System

Outreach and recruitment efforts are tracked through the CEJA Reporting System. Energy Transition Navigators must enter contacts into the system to avoid duplication of efforts and to ensure that contact information is shared among CEJA Workforce Hub and Climate Works grantees.

### Entering Inquiry Contacts

When Energy Transition Navigators identify an individual who may be interested in participating in Climate Works or the CEJA Workforce Hubs, they will be entered as an “**inquiry contact**” in the CEJA Reporting System.

Log into the CEJA Reporting System and enter the Energy Transition Navigator Program Portal. Select “Add Customer.” Enter the name and contact information (phone, email, address) of the inquiry contact so that outreach staff can follow up.

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When adding an inquiry contact and documenting follow-up outreach efforts, grantees may enter follow-up dates and add case notes. Case notes may include hours of availability, previous work experience, education, relative interest in the program, etc.

### Prescreen Assessments

During an initial outreach activity or later through a follow-up, Energy Transition Navigators will complete a Prescreening Assessment with the potential participant. Once they have completed this prescreen assessment, potential participants are considered a “**prescreen inquiry contact**.” The prescreen assessment consists of a rapid questionnaire that asks about their interest in the program and availability to participate and covers some basic eligibility questions described below.

The Prescreen Assessment is a quick assessment to screen for interest in and potential eligibility for the different CEJA programs. It will pre-populate answers that you already entered when you added inquiry contacts. It includes the following questions:

1. “Do you need any accommodations to complete this prescreening or application?”  
Accommodations could include translating the prescreening questions into a different language. If the response is “yes,” the system will request that the respondent be referred to a team member/translator.
2. First Name
3. Last Name
4. Phone
5. Email
6. Date of birth (eligibility 16+)
7. How did you hear about the program?
8. If you choose to begin a training program, will you need any accommodations to complete the training? What accommodation is needed? (Accommodations could include providing the training in a language other than English.)
9. Are you interested in working in construction and building trades? (This question specifically pertains to the Climate Works Program, which focuses on the construction and building trades. Outreach staff should provide examples of construction and building trades, such as electrician, carpenter, iron worker, HVAC technician, insulator, plumber, roofer, laborer, and others.)
10. Are you interested in working in the clean energy field? There are several career paths available, such as becoming a solar installer, wind turbine technician, or insulation installer.
  - a. Which of the following clean energy industries are you interested in learning more about? (solar, electric vehicle, HVAC, weatherization, energy efficiency, wind, or other)
11. Are you interested in applying for an apprenticeship program? (Explain what an apprenticeship program is and that the Climate Works Program will help prepare people for apprenticeship programs)
12. (Describe the time commitment for the Climate Works and/or CEJA Workforce Hub program.):  
Are you willing and able to put in the time required by this program? (yes, no, unsure)
13. You may have challenges that make it difficult to participate in the training program. Our program covers training expenses and offers support, such as childcare and transportation vouchers, to help you succeed. You’ll also receive a stipend. Are you experiencing any barriers

that would keep you from attending the training? (Briefly explain that we'll conduct a needs assessment after they apply.)

14. Street Address (Note: The system will automatically determine whether they live in an Environmental Justice and/or R3 community)
15. Have you ever been incarcerated for an arrest or conviction? (Note that this question is asked because returning residents are a target population for the CEJA workforce programs and eligible to participate. Individuals can choose not to answer this question.)
16. Have you been involved in the criminal legal system through an arrest or conviction? (Note that this question is asked because returning residents are a target population for the CEJA workforce programs and eligible to participate. Individuals can choose not to answer this question.)
17. Are you a graduate of foster care or currently in foster care? (Note that this question is asked because they are a target population for the CEJA workforce programs and eligible to participate).
18. Are you a displaced energy worker?
19. What racial or ethnic groups best describe you?
20. Veteran status

The Pre-screen Assessment can be conducted on paper, in person, or virtually, but answers must be entered into the CEJA Reporting System within 24 hours of completion. Refer to the Energy Transition Navigator Partner Guide resource page for technical instructions or a hard copy of the prescreening questions.

The CEJA Reporting System will provide a “Prescreening Result” indicating whether the person is eligible to participate or if a referral should be made to a different program. Outreach and recruitment staff will enter information from this pre-screen assessment into the CEJA Reporting System, where each potential participant will be tracked.

*Note: See Chapter 5 to learn more about the application process.*

## Additional Resources

Please see the Energy Transition Navigator Partner Guide for:

- Sample Marketing Plan and Budget Template
- Program fliers and information sheets (templates and pdfs in English and Spanish)
- CEJA posters and fliers (templates and pdfs in English and Spanish)
- Sample agenda and tips for an Open House
- High-resolution CEJA logo