

Employer Engagement Pilot

Working copy | Counts and measures | October 10, 2026

Field	Input / calculated result	Definition / instruction
Pilot / sector		Name the bounded service test.
Accountable manager		Who can change scope or stop the pilot?
Cohort start (ISO date)		Enter YYYY-MM-DD. Select the cohort before observing results.
Observation end (ISO date)		All counts use this same cutoff. Later outcomes need a new dated copy.
Decision date (ISO date)		Schedule a management review.
Cohort definition		State inclusion/exclusion rules; keep declines in the original cohort.
Relationship owner + backup		Use staff roles. Keep employer identifiers in your approved CRM.
Review the result		
Cohort count validation	ENTER COUNTS	Cumulative unique employers at each stage; never sum the stage counts.
Written commitment / cohort	n.a.	A delivery rate, not an estimated causal effect.
Partial cost / implemented	n.a.	Uses documented pilot costs only. No claim of savings or return on investment.
Cohort not implemented	n.a.	Includes declines and open cases. Explain reasons in row 33.
Enter the cohort and cost inputs		
Original employer cohort		Unique employers in the fixed cohort, including those who declined.
Contacted		Cohort members reached by the observation end.
Need confirmed		Contacted employers whose specific workforce need was documented.
Written commitment		Need-confirmed employers with a documented service commitment.
Service implemented		Committed employers whose agreed service actually started.
Staff delivery hours		Hours for this cohort, including unsuccessful outreach.
Loaded hourly cost (\$/hour)		Document the locally estimated compensation + benefit rate.
Other direct cost (\$)		Exclude staff cost already captured above; enter 0 if none.
Pilot budget limit (\$)		Approved local planning amount; this is not funding authority.
Partial delivery cost	n.a.	Staff hours × loaded hourly cost + other direct cost.
Budget remaining	n.a.	A negative amount means the planning limit was exceeded.
Available staff hours		Capacity allocated to this pilot over the same period.
Staff capacity used	n.a.	Above 100% means actual effort exceeded allocated capacity.

Employer Engagement Pilot

Working copy | Decision and maintenance | October 10, 2026

Field	Input / calculated result	Definition / instruction
Employer problem		Use employer-confirmed evidence, not an assumed need.
Offer / scope		What will the partnership deliver and what will the employer contribute?
Sponsor / training owner		Identify the responsible party; confirm authority outside this workbook.
Reasons cases stopped		Record timing, fit, capacity and employer declines without deleting cases.
Evidence reference		Use an approved aggregate export/report ID. Do not paste personal data.
Costs excluded		State missing supervision, employer, partner or overhead costs.
Decision		Choose Continue, Change, Stop or Further evidence.
Next action		One concrete change or information request.
Action owner		Role responsible for completion.
Due date (ISO date)		Enter YYYY-MM-DD.
Use and maintain		
Research source	MassHire case study	https://files.eric.ed.gov/fulltext/ED625842.pdf
Policy boundary	Stop for review	No eligibility, grant allowability, procurement or apprenticeship approval is made here. Confirm with authorized local staff and California DAS before commitments.
Owner / review	Practice editor (proposed)	Review by 2027-04-09 or sooner for source corrections, changed requirements or formula edits. Independent practitioner testing was waived for this collection; not practitioner-validated.
Example / printing	BLANK WORKING COPY	Use the companion print PDF for a stable two-page review. XLSX remains editable; do not overwrite green formulas. Save a dated copy each review.

Employer Engagement Pilot

Completed example | Counts and measures | October 10, 2026

Field	Input / calculated result	Definition / instruction
Pilot / sector	Manufacturing pilot	Name the bounded service test.
Accountable manager	Business-services manager	Who can change scope or stop the pilot?
Cohort start (ISO date)	2026-07-01	Enter YYYY-MM-DD. Select the cohort before observing results.
Observation end (ISO date)	2026-09-30	All counts use this same cutoff. Later outcomes need a new dated copy.
Decision date (ISO date)	2026-10-15	Schedule a management review.
Cohort definition	25 firms selected before outreach	State inclusion/exclusion rules; keep declines in the original cohort.
Relationship owner + backup	Engagement lead + trained backup	Use staff roles. Keep employer identifiers in your approved CRM.
Review the result		
Cohort count validation	COUNTS VALID	Cumulative unique employers at each stage; never sum the stage counts.
Written commitment / cohort	16.0%	A delivery rate, not an estimated causal effect.
Partial cost / implemented	\$3,333.33	Uses documented pilot costs only. No claim of savings or return on investment.
Cohort not implemented	22	Includes declines and open cases. Explain reasons in row 33.
Enter the cohort and cost inputs		
Original employer cohort	25	Unique employers in the fixed cohort, including those who declined.
Contacted	18	Cohort members reached by the observation end.
Need confirmed	10	Contacted employers whose specific workforce need was documented.
Written commitment	4	Need-confirmed employers with a documented service commitment.
Service implemented	3	Committed employers whose agreed service actually started.
Staff delivery hours	160	Hours for this cohort, including unsuccessful outreach.
Loaded hourly cost (\$/hour)	\$55.00	Document the locally estimated compensation + benefit rate.
Other direct cost (\$)	\$1,200.00	Exclude staff cost already captured above; enter 0 if none.
Pilot budget limit (\$)	\$12,000.00	Approved local planning amount; this is not funding authority.
Partial delivery cost	\$10,000.00	Staff hours × loaded hourly cost + other direct cost.
Budget remaining	\$2,000.00	A negative amount means the planning limit was exceeded.
Available staff hours	200	Capacity allocated to this pilot over the same period.
Staff capacity used	80.0%	Above 100% means actual effort exceeded allocated capacity.

Employer Engagement Pilot

Completed example | Decision and maintenance | October 10, 2026

Field	Input / calculated result	Definition / instruction
Employer problem	Hard-to-fill machining roles	Use employer-confirmed evidence, not an assumed need.
Offer / scope	Test structured discovery and follow-up	What will the partnership deliver and what will the employer contribute?
Sponsor / training owner	Training lead; sponsor to be confirmed	Identify the responsible party; confirm authority outside this workbook.
Reasons cases stopped	Two employers deferred; track reasons in CRM	Record timing, fit, capacity and employer declines without deleting cases.
Evidence reference	Fictional cohort export EE-01	Use an approved aggregate export/report ID. Do not paste personal data.
Costs excluded	Employer time and existing overhead excluded	State missing supervision, employer, partner or overhead costs.
Decision	Change	Choose Continue, Change, Stop or Further evidence.
Next action	Resolve sponsor capacity before expansion	One concrete change or information request.
Action owner	Business-services manager	Role responsible for completion.
Due date (ISO date)	2026-10-30	Enter YYYY-MM-DD.
Use and maintain		
Research source	MassHire case study	https://files.eric.ed.gov/fulltext/ED625842.pdf
Policy boundary	Stop for review	No eligibility, grant allowability, procurement or apprenticeship approval is made here. Confirm with authorized local staff and California DAS before commitments.
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