Orientation to the Workforce System
Bruce Wilson
Communities across the country are looking for ways to compete for economic growth and good jobs. Developing a skilled high quality workforce has become an important strategy in local economic development efforts.

Because there is a sense of urgency to deal with a host of workforce development challenges and needs...state and local workforce boards are evolving into a pivotal role: organizing comprehensive responses to these challenges.
THE THREAT

“The biggest threat to our economic survival is the lack of a skilled workforce”

Tony Zeiss, President CPCC
# Context for Change

## Workforce Investment System

### The Workforce

<table>
<thead>
<tr>
<th>CUSTOMERS</th>
<th>STAKEHOLDERS</th>
<th>CUSTOMERS</th>
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<tbody>
<tr>
<td>EMPLOYED/ UNEMPLOYED</td>
<td>STATE &amp; LOCAL GOVERNMENT</td>
<td>PRIVATE/PUBLIC EMPLOYERS</td>
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<td>DISLOCATED WORKERS</td>
<td>EDUCATIONAL INSTITUTIONS</td>
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<td>LABOR ORGANIZATIONS</td>
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<td>YOUTH</td>
<td>LABOR ORGANIZATIONS</td>
<td>OTHER PROGRAM OPERATORS</td>
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<tr>
<td>PEOPLE WITH DISABILITIES</td>
<td>TRAINING PROVIDERS</td>
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<tr>
<td>VETERANS</td>
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### The Workplace

## Customers Stakeholders

- Employed/ Unemployed
- Dislocated Workers
- Welfare
- Youth
- People with Disabilities
- Veterans

- State & Local Government
- Educational Institutions
- Community Based Organizations
- Labor Organizations
- Training Providers

- Private/Public Employers
- Non-Profit Employers
- Labor Organizations
- Other Program Operators
MODULE ONE - WHO ARE WE?

I. WANB Vision, Role and Responsibilities

II. The context – WIOA Legislation

III. Our relationship to the WANB Governing Board/Elected Officials

IV. The structure of the Workforce Development Board
The Workforce Alliance of the North Bay IS.....

✓ The workforce champion who identifies and manages workforce issues

✓ The community’s accountability agent for the delivery of quality publicly funded workforce services from CareerPoint Centers and partners

✓ The community’s repository of data and information regarding the economy and workforce

✓ The community’s convening agent for workforce issues

✓ The community’s change agent for workforce issues
I. VISION

A strong economy in which employers have an ample supply of skilled labor resources and residents have access to an abundance of quality jobs.
I. WANB ROLES AND RESPONSIBILITIES

- **Oversight** – Workforce Alliance of the North Bay & CareerPoint North Bay

- **Convener** - Bring together business, labor, education, and economic development to focus on community workforce issues

- **Workforce Analyst** - Develop, disseminate and understand current labor market and economic information and trends

- **Broker** - Bring together systems to solve common problems, or broker new relationships with businesses and workers

- **Community Voice** - Advocate for the importance of workforce policy, providing perspective about the need for skilled workers

- **Capacity Builder** - Enhance the region's ability to meet the workforce needs of local employers
II. HISTORY OF LOCAL WORKFORCE PROGRAMS

- New Deal era programs, including the Civilian Conservation Corps (CCC) 1920’s
- Manpower Development & Training Act - 1962
- Comprehensive Employment & Training Act (CETA) - 1973
- Job Training Partnership Act (JTPA) - 1982
- Workforce Investment Act (WIA) - 1998
- Workforce Innovation & Opportunity Act (WIOA) 2014
WORKFORCE INNOVATION AND OPPORTUNITY ACT OF 2014 (WIOA)

Signed into law
By President Barack Obama
II. WIOA

• The first legislative reform of the public workforce system in more than 15 years.

II. PURPOSE OF WIOA

The purpose of WIOA is to better align the workforce system with education and economic development in an effort to create a collective response to economic and labor market challenges on the national, state, and local levels.
II. GOAL OF WIOA

1. To improve the quality of the workforce, increase economic self-sufficiency, meet skills requirements of employers, and enhance productivity and competitiveness of the nation.

2. Strongly encourages regional partnerships in order to better serve businesses and job seekers by working across geo-political lines.
III. LOCAL WORKFORCE DEVELOPMENT AREAS

• Governor designates Workforce Development Area. In California there are 42 local areas, of which WANB is one.

• The designation process considers various factors including labor market and economy

• There is a Local Area Administrator for each area to administer funds at the direction of the Workforce Development Board and Chief Local Elected Official. In the WANB area, that WANB Executive Director fills that role.
III. LOCAL WORKFORCE DEVELOPMENT BOARDS

- One for Each Area (WANB Area = Marin, Napa, Lake and Mendocino)
- Each Board is certified by the Governor of California
- Appointed by Chief Local Elected Officials (CLEOs) (WANB Governing Board) using criteria established by Governor and State Board
- Sets workforce policy and conducts oversight for the local workforce system in partnership with the CLEO
IV. WANB STRUCTURE

- Workforce Alliance of the North Bay Regional Workforce Development Area  
  AKA the Regional Area

- Workforce Alliance of the North Bay Governing Board  
  AKA the Governing Board

- Workforce Alliance of the North Bay Regional Workforce Development Board  
  AKA the Regional Board
IV. STAFFING

- Executive Director reports to the Governing Board and provides executive staff support to the Regional Board
- Chief Legal Counsel reports to the Governing Board (Marin County)
- Fiscal Agent reports to the Governing Board (Marin County)
- Administrative and Project Staff work with Executive Director (JPA Contracts)
MODULE 2 - WHAT DO WE DO?

Our legal responsibilities

• with the Chief Local Elected Officials – (2 County Board of Supervisor members from each County)

• and the One Stop System – known in our area as CareerPoint North Bay centers
GOVERNING BOARD

✓ WIOA Grant Recipient & Liability for Funds
✓ Establish Regional Board, Appoint Members
✓ Develop Regional Strategic Plan with Regional Board
✓ Approve Negotiated Performance Accountability Measures
✓ Approve Designated Service Provider
✓ Monitor Budget, Activities, Performance & Services
REGIONAL BOARD

✓ Regional Strategic Plan
✓ Workforce research and regional labor market analysis
✓ Convening, brokering, and leveraging of stakeholders
✓ Sector partnerships and employer engagement
✓ Education partnerships for career pathways development
✓ Promote proven and promising practices
✓ Utilize technology to maximize accessibility and effectiveness of the local workforce development system
REGIONAL BOARD (CONTINUED)

✓ Program oversight

✓ Negotiate performance measures

✓ Competitive selection and ongoing oversight of service providers

✓ Coordination with education and training providers, including reviewing the applications to provide adult education and literacy activities in the local area to ensure alignment with the local plan

✓ Budget and administration

✓ Annual assessment of AJCC’s to ensure accessibility for individuals with disabilities
LOCAL ADVISORY COMMITTEES

✓ One for each county (Lake, Marin, Napa, Mendocino)
✓ Reports to the Regional Board
✓ Provides leadership in the over-all planning, implementation and performance of WIOA services
✓ Makes recommendations for action or implementation of activities, services, planning
✓ Committee Chair & Vice Chair appointed by Regional Board
LOCAL ADVISORY COMMITTEES (CONTINUED)

- Assist in the over-all planning, implementation, and performance of the WIOA system activities and programs.
- Follow progress of the State Board for relevant planning, information and guidance.
- Collect and review workforce data and best practices for data-driven and evidence-based recommendation and decision making.
- Assist with the Identification of key pathways and sectors.
- Assist with vetting the process for obtaining a workforce system operator.
LOCAL ADVISORY COMMITTEES (CONTINUED)

✓ Assist with the development of the regional and local plan and work toward a dynamic, innovative and effective workforce system of activities and programs for its local community.

✓ Assist with the monitoring of the workforce system’s performance measures and its continuous improvement processes once the new WIOA system is in place.

✓ Review and recommend certification of the AJCC one-stop system and any affiliations.

✓ Create task forces or sub-committees as needed.
LOCAL WORKFORCE INVESTMENT BOARDS

LIMITATIONS

1. Board prohibited from directly providing training services unless Governor waives it to do so

2. Only training providers on the Eligible Training Provider List (ETPL) can provide training to our clients (exceptions include On the Job Training, and Contract Education)
WHY ME?

• **WISDOM** - You have developed a successful way of making things work.

• **EXPERIENCE** - Your common sense is the key, because you’ve already solved most of the problems we face today.

• **CHALLENGE** - The board offers you the challenge of doing great things for our community.

• **SPECIAL RESOURCES** - You bring ideas, contacts and skills that we need for difficult problems and special situations.
THREE LEVELS OF PARTICIPATION

1. Basic
- Attends special and quarterly meetings
- Keeps current on issues that require a vote
- Participates on a committee or working group
- Offers an informed opinion
- Attracts new board members

2. Special Assignment
- Does the basics
- Selects a personal issue to work on
- Brings extra wisdom or resources to a WDB problem
- Convenes or chairs an effort
- Assists WDB staff on important efforts

3. Leadership
- Does the basics
- Uses opinion and wisdom to shape board policy
- Serves as an organizing group leader of any committee, working group or task force
- Sits on executive committee
- Leverages personal power to assist the Workforce Alliance of the North Bay
Module 3 - How Do We Do It?

Through our Flagship – The One Stop Career Center System, a.k.a CareerPoint North Bay Centers

• Legal Context – Required services, liability and performance accountability

• Local Structure – funding and service levels
Board Tools

- Regional Strategic Plan and subsequent Amendments
- Local Strategic Plan and subsequent Amendments
- One-Stop Partnership Memorandum of Understanding
- Workforce Intelligence
- Marketing Plan
- Business Services Plan
COMMITTEES – EXECUTIVE COMMITTEE

The Executive Committee assumes overall responsibility for internal board development including membership, training, resource attraction and internal governance policies. It also acts on behalf of the WDB for all matters for which prompt action is necessary. The overall objective of the committee is to develop a high performing Board with dedicated and informed members, to move business of the board forward, and to increase the resources of the Board.
COMMITTEES – POLICY AND OVERSIGHT

The Policy and Oversight committee assumes responsibility for establishment to Workforce Alliance policies and ongoing oversight of WANB investments (i.e. CareerPoint Centers). In doing so, they establish a process for the creation, review and approval of all workforce policies throughout the region and recommend staff and board actions based on data and information.
Regional plans and partnerships required by WIOA function under California’s State Plan as the primary mechanism for aligning educational and training provider services with regional industry sector needs in California’s fourteen WIOA Regional Planning Units (RPUs). California state law requires coordination between the K-12, Community Colleges, and WIOA systems and requires the use of sector strategies as the operational framework for the state’s workforce system. These two state mandated requirements are met under the State Plan by making federally required WIOA regional plans and partnerships the primary mechanism for aligning educational and training programs with regional industry sector needs. As such, the main aim of regional plans is the development of “regional sector pathway” programs, by which we mean the identification, utilization, and servicing of career pathway programs aligned with regional industry sector needs in each of the RPUs.
LOCAL STRATEGIC PLAN

Under the State Plan, the primary purpose of local workforce plans and partnerships is to facilitate access to workforce services at the local level. While WIOA Section 106 regional plans and partnerships are specifically focused on constructing a regional training and education architecture that aligns with regional labor markets, individuals will access and experience this regional workforce architecture primarily through local service delivery efforts, principally those of WIOA partners operating in the America’s Job Center of California (AJCC) system, formally known as a One-Stop Career Centers, but potentially through other partners of the workforce system as well. In this regard, it is typically at the local level where services will be integrated, resources braided, and supportive services provided to individuals being served by the partners.
MARKETING & COMMUNICATIONS PLAN

The MarComm Plan includes both broad brand management strategies, as well as specific target audience outreach strategies to maximize engagement.

The brand strategy includes recommendations for logos, naming and messaging for the WANB and its various brands within its portfolio such as Bright Futures and the AJCCs.

Contact staff for full PDF copy of WANB MarComm Plan
BUSINESS SERVICES PLAN

Currently Under Development and in DRAFT form.

Contact staff for DRAFT copy
WORKFORCE INTELLIGENCE REPORTS/STUDIES

• Assesses community needs as they relate to workforce
• Builds foundation for local workforce planning
• Identifies critical workforce issues
• Educates the community about local labor market and economy
• Examples:
  • Customized economic and labor market reports (EMSI)
  • Local research studies, i.e., Career Pathway Network
  • Industry Sector analysis
  • State of the Workforce Reports

Click for sample reports: http://www.workforcealliancenorthbay.org/data-publications/
WHAT IS A ONE STOP?

A one stop is an attempt to bring the employment and training services of all partners under one roof.
ONE-STOP SERVICE DELIVERY

• One-Stop system must be established in each local area.

• Local board, in collaboration with CLEO, oversees One-Stop system.

• Local communities have flexibility in designing the system to meet their community needs.

• The WANB has four One Stop systems (One in each County) and they are collectively known as CareerPoint North Bay.

• May be supplemented by other centers, electronic access points and networks at affiliated sites.
CAREERPOINT SYSTEM

A system of partners who share the goals of

1) Creating & maintaining a healthy, balanced economy, and
2) Ensuring vitality and self-sufficiency of our local residents.

On-Site Partners
- Welfare to Work
- WIOA
- Experience Works
- CA Human Development Corp.
- Public Assistance
- Employment Development Dept.
- Adult Education

Off-Site Partners
- Small Business Development Center
- County Office of Education
- County Veteran’s Services
- Chamber of Commerce
- Community College
- Family Resource Centers
SAMPLE SERVICES

1. CAREER SERVICES
   - Basic Career Services
     - Orientation to Services
     - Computer workstations & Electronic job boards
     - Workshops
     - Resource Room/Career Center
   - Enrolled Career Services
     - Intake
     - 1x1 Career Counseling w/ an Employment Plan
     - Skill and Interest Assessments
     - Job Development
     - Supportive Services
     - & more

2. TRAINING SERVICES
   - Classroom based
   - On the job training
   - Work Experience
   - Subsidized employment
WORKFORCE SYSTEM DESIGN

Partner Driven Services

SELF ACCESS SERVICES

500 People

Orientation to services
Computer Workstations
Electronic job boards
Workshops
Resource room/Career Center

WIOA Driven

STAFF ASSISTED SERVICES

200 People

Intake
1x1 Career Counseling
Individual Employment Plan
Job Development
Supportive Services
Skill and Interest Assessment

WIOA Driven

TRAINING

75 People

Tuition
Tools/Books/Uniforms
On the Job Training
Classroom Training
Customized Training
Incumbent Worker Training
Each One-Stop partner must enter into a Memorandum of Understanding (MOU) with the local board.

MOU must describe:

- Services to be provided through One-Stop
- How services and operating costs of system will be funded
- Methods of referral of individuals between One-Stop operators and One-Stop partners
- Duration of and process for amending MOU
SERVICES AVAILABLE TO DISLOCATED WORKERS AND ADULTS

The One-Stop is to make accessible:

1. Basic Career Services
2. Career services
3. Training services
4. Discretionary activities

- One-Stop services such as customized screening and referral of participants and customized services to employers
- Supportive services
- Needs-related payments
TRAINING SERVICES

• Customer choice is the guiding principle

• Training must be provided through Individual Training Accounts (ITAs)

• Training must be in demand occupations where industry is growing

• Limited exception where training may be provided by contract rather than ITA
FORMULA YOUTH PROGRAMS

• Single funding stream for year-round and summer
• Local board competitively awards grants or contracts for youth services
• Integration into One-Stop is local decision
• At least 30 percent of funds must be used for out-of-school youth
SERVICES UNDER FORMULA YOUTH PROGRAMS

- Tutoring, study skills training, and dropout prevention activities
- Alternative secondary school services
- Summer employment opportunities
- Paid and unpaid work experience
- Occupational skills training

- Leadership development activities
- Supportive services
- Adult mentoring
- Follow-up services
- Comprehensive guidance and counseling
FUNDING

- Adult
- Dislocated Workers
- Youth
- Rapid Response
- Special Funds
ALLOCATION OF FUNDS

• Three funding streams to states and localities: (a) Adults, (b) Dislocated Workers and (c) Youth

• 85% of adult and youth funds allocated to local areas; 15% for statewide activities

• Separate authorization for national activities

• 20% of dislocated worker funds reserved for Secretary to carry out national emergency grants, technical assistance & demonstrations

• 60% of remainder allocated to local areas, 15% for statewide activities, and 25% for state Rapid Response activities
PROGRAM LIABILITY
(LOSE FUTURE MONEY)

VS.

FISCAL LIABILITY
(GIVE CURRENT MONEY BACK)
PROGRAM LIABILITY (LOSE FUTURE MONEY)

Contractual Performance Requirements!

• Enrollments
• Placements/Exits
• Wage at Placement
• Retention
FISCAL LIABILITY (GIVE CURRENT MONEY BACK)

Disallowed Costs

- Ineligible Clients
- Non Competitive Procurements
- Incorrect record keeping
  - Unsubstantiated expenditures
- Forbidden Activities
  - Unionizing
  - Political
  - Church
LIABILITY TRAIL

U. S. Congress

↓

DOL - 100%

CA - 100%

EDD - 100%

Governing Board - 100% (Fiscal)

WANB Regional Workforce Board - 100% (Program)

Contractors - 100% (Both)
PERFORMANCE ACCOUNTABILITY

The core indicators of performance for Adults, Dislocated Workers, and Youth ages 14-24:

- Retention in employment 6 months after placement
- Retention in employment 12 months after placement
- Earnings 6 months after placement
- Attainment of recognized credential
- Measurable Skill Gain

- Effectiveness in Serving Employers
- 1 year retention with same employer
- Repeat business within a 3 year period
PERFORMANCE ACCOUNTABILITY (CONTINUED)

- State must negotiate expected levels of performance for state as a whole with the Secretary of Labor (Dept Of Labor, DOL)
- State conducts similar negotiations with local areas (WDBS)
- State submits annual report on state and local performance to DOL
INCENTIVES, SANCTIONS, AND TECHNICAL ASSISTANCE

- States failing to meet expected levels of performance can request DOL technical assistance
- States failing for second consecutive year subject to up to 5% reduction in funding
- Parallel process for setting local performance levels exists between state and local areas
THE LOCAL PICTURE

• Funds and Performance
LOCAL FUNDS

2018-2019 (Program+Admin) Formula Allocation for:

- Adult $953,843
- Dislocated worker $1,001,934
- Youth $886,493
- Rapid Response $458,498
LOCAL FUNDS

Distribution of funds 2018-2019

- WANB $742,725 (Rapid Response & 10% hold back)
- Service Providers $2,558,043
## State Negotiated Performance

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# Local Performance Standards

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<th>Training</th>
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Module 4 – Why We Do It

1. Solve workforce problems in the community

2. Get positive results
EFFECTIVE WORKFORCE BOARDS

• Understand local economy
• Data-driven strategic focus
• Accept responsibility for services
• Convene essential voices
• Engage business members
• Seek diversified funds
• Demand proactive & diverse business services
• Advocate on behalf of community
CHARACTERISTICS OF COMPETITIVE COMMUNITIES

1. Forward Thinking Community Leaders
2. Business Investment in Human Capital
3. Strong and Diverse Economy
4. Integrated Infrastructure
5. Effective, Articulated Education System
6. Clearly Defined and Accessible Career Pathways
7. Ready, Willing and Able Workforce
1. **FORWARD THINKING COMMUNITY LEADERS**

What WDBs do:

- Engage and inform County Boards of Supervisors, Mayors and City Councils
- Convene summits about workforce issues
- Publish “State of the Workforce” reports
- Invite elected officials to WDB meetings and One-Stop tours
- Convene focus groups with key industry clusters
- Participate in community planning efforts
What WDBs do:

- Convene employers in the same industry to discuss skills needs
- Connect employers to public resources for skills upgrade training
- Act as a broker with community colleges/higher education and University Extensions for curriculum design
- Provide data about prevailing wages, occupations, future trends
- Act as human resource departments for small business
What WDBs do:

- Have cross representation on WDBs and Economic Development corporations and agencies
- Participate in overall economic development planning
- Cross-train front line staff in One-Stops and economic development organizations
- Collect and provide information about the community’s workers and their skills
- Participate in co-developed employer retention surveys with economic development
What WDBs do:

✓ Participate in a broad range of regional and community planning efforts

✓ Include a broad range of partners and services in One-Stops

✓ Advocate for changes in public policy and administrative procedures

✓ Engage local elected officials in problem solving

✓ Have cross representation on WDB and community boards and agencies
5. **Effective, Articulated Education System**

What WDBs do:

- Establish and nurture strong youth councils that work for all youth
- Catalyze dialogue between employers and education
- Collect and provide information about skills needs
- Include youth in One-Stop system services
- Provide accessible information about careers
- Provide accessible information about performance of job training programs and providers
6. **Clearly Defined and Accessible Career Pathways**

What WDBs do:

- ✓ Convene employers within an industry to study career pathways
- ✓ Collect and disseminate information about career pathways and occupation requirements
- ✓ Partner with labor unions
- ✓ Train career guidance counselors and others in career information
EXAMPLES OF WORK
EXAMPLE - A SECTOR INITIATIVE

Sector initiatives are long-term efforts that integrate workforce, education and economic development strategies. They have four defining characteristics:

1. Sector initiatives **focus attention on the needs of multiple employers in a specific industry** in a specific community or economic region.

2. Sector initiatives serve **dual customers**—delivering new solutions to employers in the target industry as well as to the workers or the unemployed who might improve both their short and long-term economic status by providing improved staffing in the industry.

3. Sector initiatives **build in-depth knowledge of the industry and design multiple solutions** to staffing and competitiveness challenges facing the industry by coordinating an array of resources to improve these challenges over time.

4. Sector initiatives promote **community change** that achieves win-win solutions for employers and workers in the industry. These can occur through shifts in industry practice, reform of education and training systems, improvements in recruiting and support systems for entry level employees, the institution of new career ladders, and/or productivity enhancements throughout the industry, to name a few.
Driving Workforce Talent

**Outcomes for Employers**
- 41% report reductions in turnover
- 84% report significant increases in productivity
- 100% report participation in Partnership was valuable

**Industry Members**
(Reps from firms in a single industry)

**Strategic Partners**

**Outcomes for Workers**
- 48% of participants exited poverty
- 18% higher earnings
- More likely to work in jobs with benefits

Partnership benefits reverberate back out to the community
EXAMPLE - A BUSINESS TO BUSINESS INITIATIVE

- Information And Research
- Hiring And Retaining Employees
- Training And Education
- Partnerships/Economic Development
- The Emerging Workforce
- Rapid/Comprehensive Response
EXAMPLE - EDUCATIONAL INITIATIVES

- Promote the development and use of portable credentials.

- Workers must become “career entrepreneurs” responsible for their own training and development.

- Promoting the use of portable credentials that document a worker’s skills is important in a churning labor market.

- Develop state-recognized credentials, adopt industry-based certifications, or address this issue in other innovative ways.
EXAMPLE - DEMOGRAPHIC INITIATIVES

Design programs to meet the diverse needs of workers within the context of the workforce’s changing demographics.

The workforce development system must be responsive to the needs of these customers, many of who are illiterate in their native language and some of who need only English language skills.

Employers and the Departments of Labor, Commerce, and Education (particularly adult education) should partner to develop innovative approaches to addressing this issue.
HOW TO MAKE AN IMPACT

- Learn relevant facts
- Attend meetings REGULARLY
- Serve on committees
- Be positively impatient
- Visit a One Stop
- Learn the rules
SUCCESS FACTOR: EXECUTIVE DIRECTOR CHARACTERISTICS

- Business competent
- Entrepreneurial
- System thinker
- Strategic thinker
- Political strategist
- Problem solver

- Relationships manager
- Influencer
- Mediator
- Flexible
- Team player
- Resolve