

# Expanding Business Engagement

Grantee Kick-Off Meeting  
July 19 at 2pm EDT



# Today's Presenters

- All of you!
- Gina Wells, Office of Workforce Investment  
[wells.gina@dol.gov](mailto:wells.gina@dol.gov), (202) 693-3763
- Megan Lizik, Office of Workforce Investment  
[lizik.megan@dol.gov](mailto:lizik.megan@dol.gov), (202) 693-3688
- Jonathan Payne, Office of Workforce Investment  
[payne.jonathan@dol.gov](mailto:payne.jonathan@dol.gov), (202) 693-2661
- Vinz Koller, Project Director, SPR  
[vinz\\_koller@spra.com](mailto:vinz_koller@spra.com), (510) 763-1499 Ext. 638
- Kevin Brumback, Office of Grants Management  
[brumback.kevin@dol.gov](mailto:brumback.kevin@dol.gov), (202) 693-3381
- Jen Troke, Office of Workforce Investment  
[troke.jennifer@dol.gov](mailto:troke.jennifer@dol.gov), (202) 693-2665

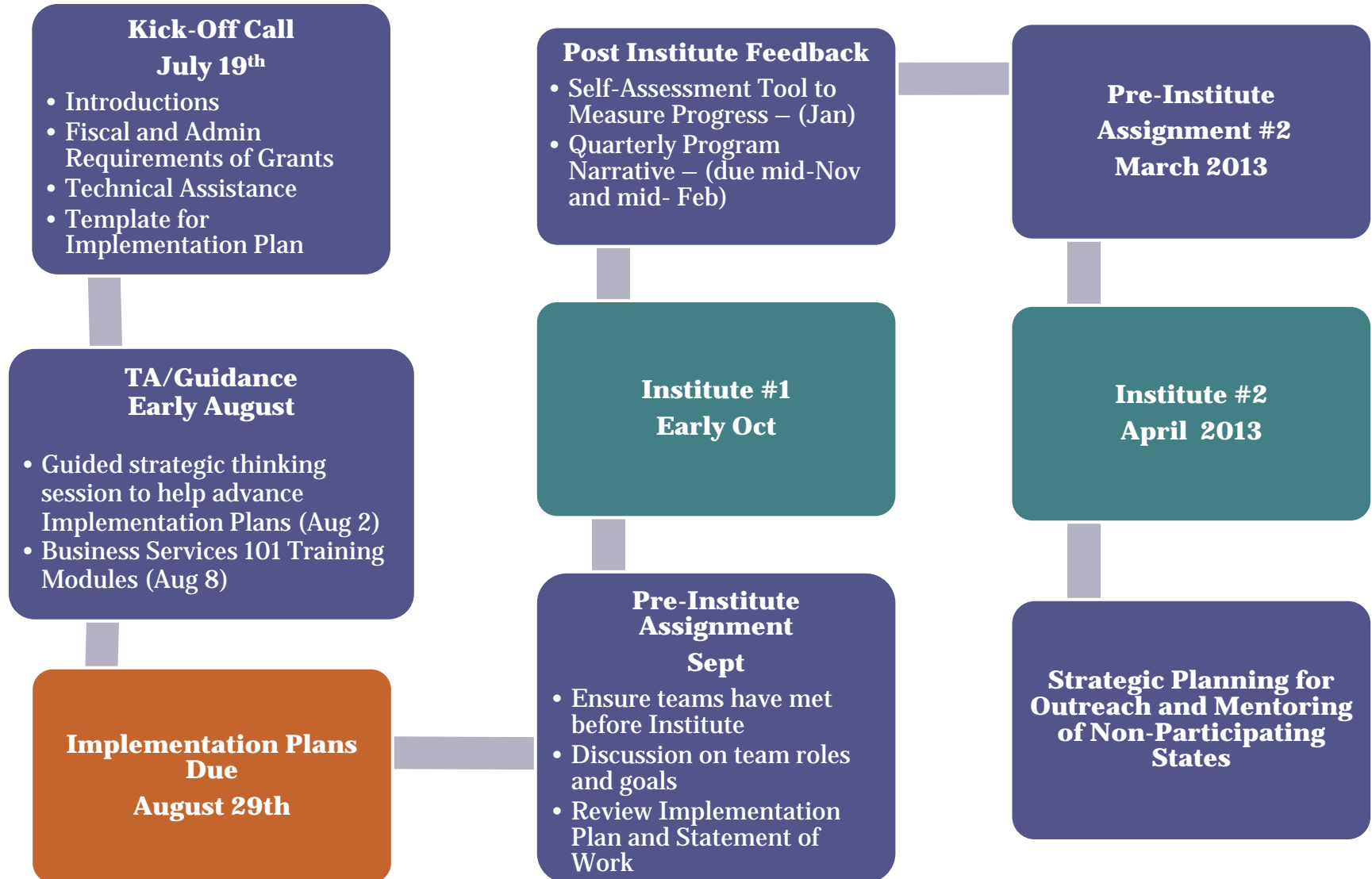
# Agenda

- Overview of the Expanding Business Engagement (EBE) Technical Assistance Initiative
- Grantee Introductions and Postcards
- Roles and Responsibilities
- Grant Award Information
- Federal Reporting
- Technical Assistance
- Next Steps
- Questions

# Overview of the EBE TA Initiative

- Grants will support the strategic planning and implementation of revitalized or enhanced business engagement activities within your states
- Two phases:
  - 1) Strategic planning and two Institutes
  - 2) Plan implementation and mentoring
- Period of performance: 24 months

# Expanding Business Engagement - TA Initiative



# Grantee Introductions and Postcards

- Colorado
- Florida
- Indiana
- Maryland
- Massachusetts
- Minnesota
- Mississippi
- Montana
- New Jersey
- North Carolina
- Ohio
- Oklahoma
- South Carolina





## ***Goals***

*Increase employer engagement,  
improve quality and consistency  
of service delivery and branding*

## ***Expectations***

*Increase/yr in employer  
engagement ; innovative  
improvements in policy, process &  
technology; expanded & improved  
business services performance  
metrics & reporting; and statewide  
Training Academies*

### **Colorado Workforce System**

- 65 Workforce Centers
- 19 Regions: 11 rural, 8 urban
- Local Control via WIBs
- State & Regional Business Development Representatives

## ***Taking Care of Business Summit***



CDOL/Local WFC Business Services Action Plan  
CWDC Strategic Plan

**Colorado Blueprint** Strategic Plan EDO

*Building on a Solid Strategic Foundation*

**Karen Hoopes**  
**Sherman Swafford**





## *State Investment Board of Business and Government Leaders*

- Helping Floridians enter, remain and advance in the workforce through training and education
- Strengthening the state's business climate by addressing Florida's talent needs

## *Enhancing Business Engagement Technical Assistance Initiative*

### **GOALS & EXPECTATIONS**

#### **I: Set goals for meeting business talent needs**

- Identify key performance indicators

#### **II: Assess infrastructure, acquire capability to Track – Measure – Report**

- Create performance dashboard
- Procure Customer Relationship Management system
  - Replicate Workforce Alliance best practice

#### **III: “One System” – Give voice to all regions**

- Expand technical assistance to business services professionals
- Partners – Heartland Workforce & Workforce Alliance



Program Director DEBBIE MCMULLIAN • [dmcnullian@workforceflorida.com](mailto:dmcnullian@workforceflorida.com) • (850) 922-8647





# *Indiana Business Solutions*

## *Point of Contact*

*Mike Barnes*

*Director of Business Solutions*

*[mlbarnes@dwd.in.gov](mailto:mlbarnes@dwd.in.gov)*

*(317) 650-2809*

*Marcia Gray*

*Field Operations Coordinator*

*[mgray@dwd.in.gov](mailto:mgray@dwd.in.gov)*

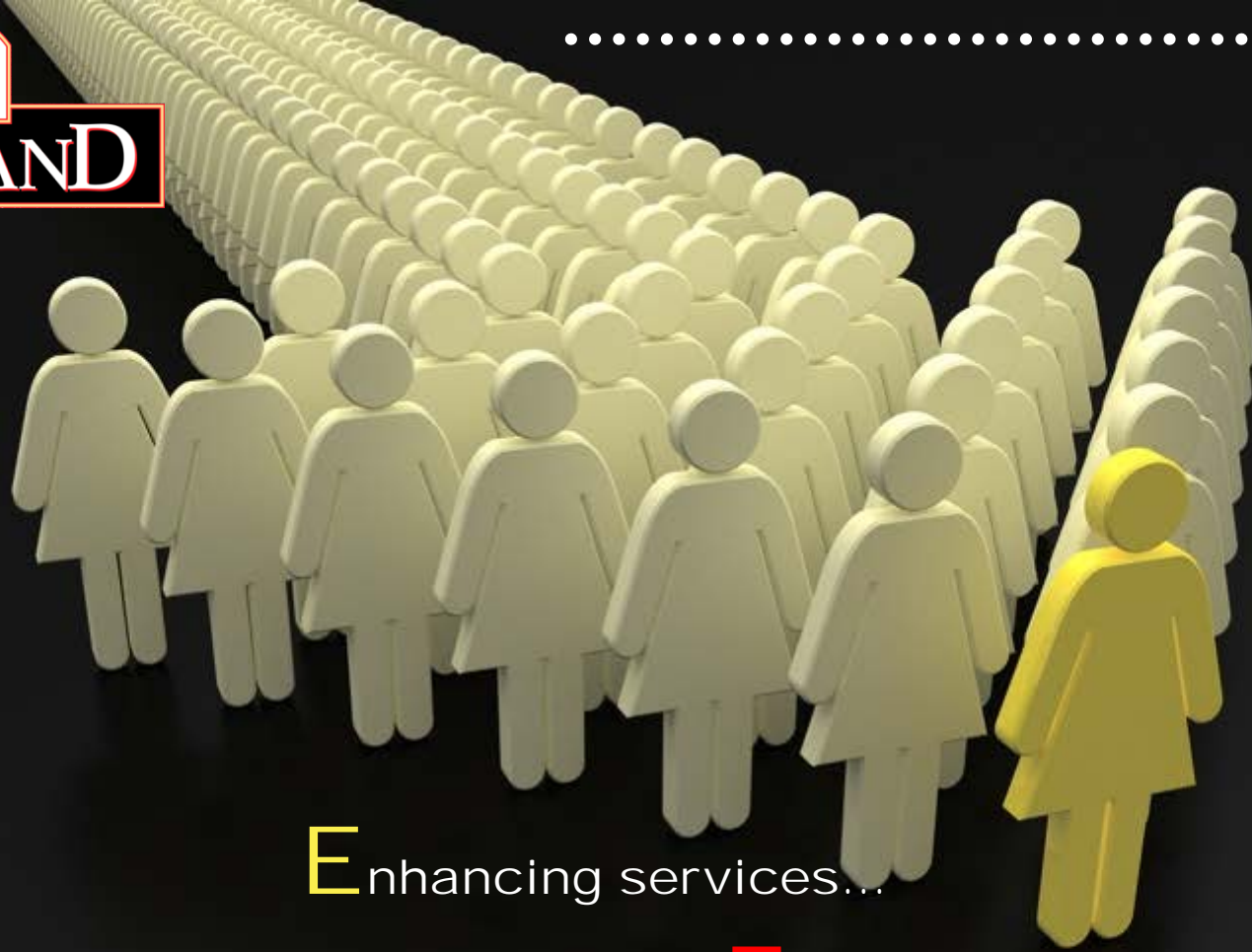
*(317) 232-3287*

## *EBE Grant Goals*

- *Increase business participation (new and repeat)*
- *Evaluate services most valued by employers*
- *More efficient and effective data utilization*
- *Create a high standard for service delivery*



MARYLAND



Enhancing services...

Bridging Relationships...

Embracing Partnerships...

Moving Maryland Forward...taking Partnership and Business

in a

**Brand New Direction**



# Massachusetts

- **Diane Hurley**
- **Ken Messina**



## Overview of Job Service's Business Services

- Started in 2004, created new "Business Services Specialist" position dedicated to providing and coordinating demand-driven services
- Supports the state's and nation's labor exchange by increasing new employer accounts and job postings as well as coordinating job placement with WorkForce Center Programs
- 5,631 consultations with employers conducted in PY2011

### ***Minnesota's goals for the EBE technical assistance grant:***

<b>Objective</b>	<b>Outcomes</b>	<b>Deliverables</b>	<b>Time Table</b>
<b>#1 Business Services Policy Update</b>	All policies are reviewed and up-to date, reflecting regional approach and broader partnerships	A new policy manual is made available for system partners	Year 1 of the project
<b>#2 Business Services Strategic Plan</b>	New plan reflects regional approach and broader engagement of partners	Regional Plans endorsed by the LWIBs	Year 1 of the project
<b>#3 Evaluate CRM System and Reporting</b>	Determine the value/results of Salesforce.com	Recommendation to continue with or replace the CRM system	Year 2 of the project
<b>#4 Evaluate Options for On-line Services for Business</b>	Evaluation of various current practices for on-line services for businesses	Recommendations for on-line services for business customers	Year 2 of the project



# Montana EBE Grant

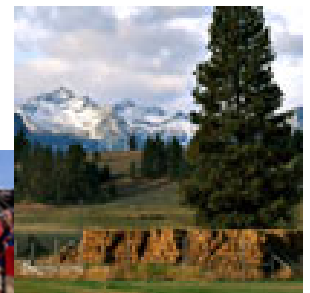


## About Us:

- The Department of Labor & Industry, Workforce Services Division (WSD) is a gateway to government services in the area of employment and training services.
- WSD is comprised of a team of experts located in a central support office and 24 local Job Service One Stop Center sites throughout the state.
- Our focus is developing and maintaining a high quality workforce system for Montana by providing services to demand-driven businesses and job seekers, government officials and entities, the public, and to its own employees.
- Three years ago we formed a Business Services Committee, with 1 committee member from each of the 5 regions in Montana. The committee coordinates statewide training for One Stop Center staff and creates resources for staff to share with businesses. For ease of access for businesses, these resources are also posted on <http://mt.gov>.

## Our EBE Goals/Expectations:

- Through the EBE Technical Assistance Grant learn new processes and techniques for reaching out to Montana businesses
- Increase number of first time and repeat business customers to One Stop Centers
- Expand array of business valued services
- Increase % of individuals in training activities who enter training related employment
- Increase ratio of placements to referrals for job openings posted by employers
- Reduce the average number of days to fill job openings
- Increase employer satisfaction with One Stop Center services



# ***New Jersey's Talent Connection Resources***

Talent Networks    Veterans Services    Local WIBs  
One Stop Centers    DVRS    Business Representatives  
SETC    Economic Development    Labor Unions

**Vision-Mission-Goals**

**Customer Management**

**Performance Metrics**



***New Jersey's Employers***





# NC Means Business



**Merger of WIA &  
Wagner-Peyser =**

**Division of  
Workforce  
Solutions**

**NC Commission  
on Workforce  
Development**

**2011 State of the  
Workforce Report**

**Collaboratively Address:  
Programs and Policies  
Branding  
Technology  
Service Delivery  
Staff Development**

*Microbreweries*



*Energy*



*Aerospace*



*Tourism*



*Finance*



***Business-  
Centered Service  
Delivery***

*Biotechnology*



*Film Industry*



# Ohio Department of Job & Family Services

## Office of Workforce Development

17

- **Project:** Ohio's Expanding Business Engagement—Technical Assistance Initiative
- **Vision:** Ohio's vision is a workforce system that is demand-driven, adaptive to rapid change, innovative in design and delivery, entrepreneurial in spirit, and responsive to the needs of employers, workers, and job seeker.
- **Outcomes/Goals:**
  - Establish a team to plan and implement the expanding business engagement initiative.
  - Create an operational framework for development and implementation of the business engagement initiative.
  - Develop a communication plan to engage and inform multiple stakeholders.
  - Conduct pre and post Institute activities geared toward expanding business engagement and promotion of enhanced and integrated service delivery.
  - Assess the impact of the business engagement initiative.
- **Grantee Contacts:**

Tanya Calbert, Project Manager  
ODJFS/OWD (614) 644-0264  
[Tanya.Calbert@jfs.ohio.gov](mailto:Tanya.Calbert@jfs.ohio.gov)

Mark Birnbrich, Project Director  
ODJFS/OWD (614) 644-0783  
[Mark.Birnbrich@jfs.ohio.gov](mailto:Mark.Birnbrich@jfs.ohio.gov)



# Oklahoma Employment Security Commission

## EXPANDING BUSINESS ENGAGEMENT

### Growing Oklahoma's Relationship with Employers...

#### Understanding Needs

- Understanding the biggest challenges that employers face in finding, hiring, developing and retaining employees.
- Gaining insights into recruiting, screening and assessment, and training resources that employers value most.
- Further assessing whether local Workforce Oklahoma Centers currently meet the needs of business.

#### Innovation

- Talent Acquisition Teams
- Employer Councils
- Concierge Style Services/One-Stop Shopping

#### Achieving Goals

- Improve the employer's perception and understanding of the Workforce Oklahoma Center.
- Expand the array of business-valued services offered throughout the State.
- Increase the number of employers accessing services for the first time.
- Increase the ratio of placements to referrals for job openings and reduce the average number of days to fill a job.

#### Getting In Touch

Kim Braddy

[kim.braddy@oesc.state.ok.us](mailto:kim.braddy@oesc.state.ok.us)

(405) 557-5394

Tami Decker

[tamara.decker@oesc.state.ok.us](mailto:tamara.decker@oesc.state.ok.us)

(405) 962-7595

## **South Carolina Department of Employment and Workforce**

### **Expanding Business Engagement (EBE) – Technical Assistance Initiative**

**Michelle Paczynski, Director of Business Services**  
**"Putting South Carolinians Back to Work"**

**Specific goals SC will pursue through the EBE Initiative:**

- 1. Increase the number of employers accessing services for the first time through the One-Stop Career Center delivery system to 45% in CY 2012 and 60% in CY2013.**
- 2. Increase the number of repeat small business accessing One-Stop Career Center services by 25% in PY 2012 and 25% in PY 2013.**
- 3. Increase the percentage of individuals enrolled in training activities who enter training related employment, particularly OJT, Incumbent Worker Training, Customized Training, and Registered Apprenticeships, to 6% in PY 2012 and 10% in PY 2013.**

Michelle Paczynski  
803.737.3828  
[mpaczynski@dew.sc.gov](mailto:mpaczynski@dew.sc.gov)



# Roles and Responsibilities



- **National Office EBE Team:**  
**Gina Wells, Megan Lizik, Jonathan Payne, Sara Williams, Jen Troke, Stu Werner**
  - Providing leadership for TA and grants management activities
  - FPOs
  - Concurrence on some modifications of SOWs
  - Support for regional conferences
  - Establishing policy guidance as needed
- **Grant Officer**
- **The Grantees**



**Vinz Koller**  
Director,  
Training & Technical Assistance  
Social Policy Research Associates





National Convenings



Coaching



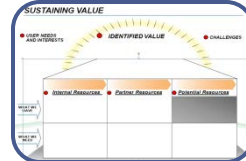
Peer Exchange



Online Learning & Tools



Subject Matter Experts



Tools

- Non-conference
- Flexible, facilitated spaces
- Peer-exchange
- Team emphasis
- Subject-matter expert support
- Action-planning focus



Vinz Koller, Project Director

(510) 763-1499 Ext. 638

[vinz\\_koller@spra.com](mailto:vinz_koller@spra.com)

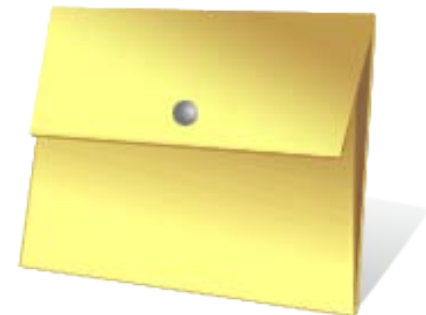
Trace Elms

(510) 788-2488

[telms@spra.com](mailto:telms@spra.com)

# Grant Award Information

- Grant Award Package/Letter
- Grant Agreement – Notice of Award Obligation
- Signed SF424
- Administrative Cost limitations
- Statement of Work
- Budget Information
- Assurances/Certifications
- Special Clauses and Conditions



# Workforce Investment Act

- Authorizing statute
- WIA Section 132(a)(2)(a)
- WIA Section 171(d) – Dislocated Worker Projects

# Uniform Administrative Requirements

- 29 CFR Part 97 – Governments
- 29 CFR Part 95 – for Institutions of Higher Education, Nonprofits, for-profits



# Federal Cost Principles

- Set of government wide rules
  - Now codified at 2 CFR
- Cost principles
  - Define conditions for charging costs
- Types of Allowable costs
  - Allowable
  - Unallowable
  - Allowable with conditions

# Equipment



- 2 CFR 225: Equipment defined as nonexpendable tangible personal property having a useful life of more than one year and an acquisition cost of \$5000 or more.
- 29 CFR 95.2(n)
- 29 CFR 97.32

# Prior Approval for Equipment

- Submit detailed description to Federal Project Officer
  - Requested in writing
- Must be approved
  - Before costs are incurred



# Meetings

- Part IV – Special Conditions
- Pre-clearance required for any meetings or conferences that are being planned by grantee that requires more than five (5) DOL employees.
- Submit detailed request to Federal Project Officer.
- Federal space should be used unless unavailable or inadequate.

# Procurement

- Procurement requirements
  - Open and free competition
- Procurement regulations
  - 29 CFR 97.36 or 95.44



# Administrative Costs

- 20 CFR 667.220 - WIA definition of administrative costs
- Not related to direct provision of workforce investment services
- Function based
- Can be personnel, non-personnel, direct or indirect
- **10%** limit
- Measured against grant award amount
- Compliance measured at end of grant



# Federal Reporting

- Quarterly Financial Reports
  - Basic ETA-9130
  - Shantay Logan  
[logan.shantay@dol.gov](mailto:logan.shantay@dol.gov)
- Quarterly Program Narrative Reports
  - Suggested format forthcoming



## Additional Information

- Online training and webinars on financial and administrative grant management at:  
<http://etareporting.workforce3one.org>
- [Fiscal.policy@dol.gov](mailto:Fiscal.policy@dol.gov) – fiscal policy questions.  
Please copy your FPO.

## Implementation Plans – Due Aug. 29th

- **Template provided to help grantees frame their project goals over the 2-year EBE timeline**
  - Background/Statement of Need
  - Goals for Overall EBE Initiative
  - Team Selection and Composition
  - Goals for Fall Institute
  - Pre-Institute Planning
  - Follow-Up Activities
  - Preliminary Year Two Mentoring Ideas

# Resources

- Business Services Leadership Website

<http://businessengagement.workforce3one.org/>



Existing Training Content with E-Tools Focus	New Training Content
<b>Understanding LMI:</b> BLS Sites, Employer Locator, O*NET Toolkit for Business	<b>Clarifying the Roles and Responsibilities of BSR Staff:</b> Relationships, Think Like A Recruiter
<b>Engaging Business:</b> Competency Models and Career Ladders	<b>Developing and Aligning Business Services with Demand:</b> Defining Business Services
<b>Delivering Services:</b> OJT Toolkit, Job Description Writer	<b>Marketing and Outreach Strategies:</b> Account Management Strategy
<b>Measuring Results:</b> Linked In, Survey Tools	<b>Customized Training Templates:</b> In Development
<b>Social Media:</b> Linked In, Virtual Job Fairs	<b>What's Missing?</b>

# Get In There!

- LinkedIn Group
- ***Bottom Line*** Newsletter  
<http://businessengagement.workforce3one.org/resources/files/the-bottom-line-newsletter-issue-1>
- Business Services 101 Webinar

# Next Steps

- Approach partners
- Continue working on your implementation plans (due August 29<sup>th</sup>)
- Coaching calls to provide guided strategic thinking (August 2<sup>nd</sup>)
- Business Services 101 Webinar (August 8<sup>th</sup>)
- Pre-Institute Assignment (early September)

# Questions?

