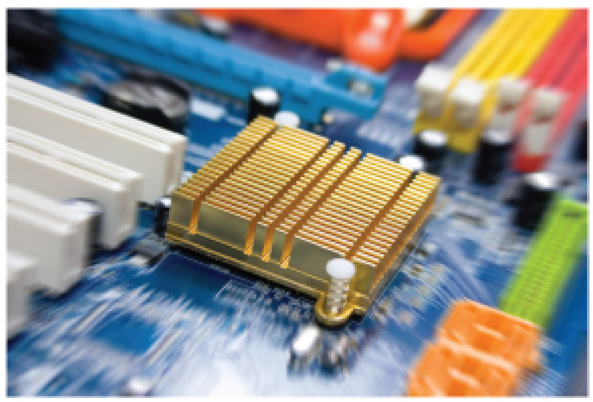
SECTOR STRATEGIES CONVENER’S GUIDE TO PARTNER OUTREACH



ABOUT THIS GUIDE:

This guide is designed to provide sector partnership conveners with guidance for engaging employers and other partners before, during and after partnership meetings. The guide includes a sample meeting agenda, potential questions to support engagement with employers and follow-up steps. In recognition of the importance of demonstrating progress and "wins" to sustain engagement, this guide also includes guidance regarding measurement of sector strategy implementation to support long-term partnership sustainability.

The guide is divided into four sections:

- Shared Regional Vision for Sector Partnership(s)
- Sector Partnership Meeting Planning and Preparation
- Sector Partnership Meeting Structure and Facilitation
- Post-Sector Partnership Meeting: Next Steps
- Measurement of Sector Partnership Implementation

While these steps are presented as a straightforward, linear approach, it is important to recognize that an effective sector partnership responds to the context of its region and the constantly adjusting needs of its employers. Therefore, these steps are presented as a general guide. For example, your partnership may not need all of the items on the sample agenda or may have additional discussion items to include that are critical for moving the work forward. The point is to use this guide as just that – a guide to advancing the work of your regional sector partnership that has its own unique objectives while still conforming to the following key elements of world-class sector strategies:

- Driven by great data;
- Founded on a shared regional vision;
- Led by industry;
- Leads to strategic alignment;
- Transforms how services (both employer and job seeker) are delivered; and
- Measured, improved and sustained.

Finally, it is important to note that a new sector partnership does not need to be formed if there is an existing collaborative or partnership which is engaging employers from the desired target industry. In this case, the focus is on working with the convening body to ensure that shared vision for the partnership is articulated, meetings are structured to ensure in-depth discussion regarding employer needs and solutions are developed, refined and implemented collaboratively across the partnership.

ESTABLISHING A SECTOR PARTNERSHIP:

Why must a sector partnership be founded on a shared regional vision?

A shared vision serves as a common thread that ties that the partners' work together. It is a commitment to an end game that all partners have agreed to which helps to set a standard, drive change and keep partners focused. In other words, the shared vision provides a clear sense of direction for the partnership.

Through the identification of a shared vision, all partners align around the same target industry sectors and agree to "shoot their arrows" at the same targets. This means that partners commit to aligning their policies, processes and investment of resources to collaboratively meet the needs of the targeted sector.

How do we develop and institutionalize a shared vision?

Many successful partnerships work collectively to articulate a shared vision which is then documented and institutionalized in a partnership charter. The charter serves as a cornerstone to keep the partnership on track and focused and can serve to orient new members to the group. It defines the key components of how the partnership will work, including:

- Vision and mission statements
- Membership & roles of your partnership
  - What is expected of each member?
- Defines objectives and timelines
- Defines outcomes and metrics
  - How will the partnership measure success?

Partnership members vote to adopt the charter, thereby committing their organization's time, resources and reputation to the sector partnership.

Once the system partners have an articulated shared vision in place, they are ready to bring business to the table to discuss their needs and welcome them to the sector partnership. The shared vision will demonstrate the partners' commitment to collaboratively meeting the needs of the sector.

MEETING PLANNING AND PREPARATION

Why are we bringing together business leaders, along with partners from workforce, education, economic, and community development around a series of industry sector meetings?

There are numerous reasons to bring partners to the table:

- To provide a return on investment for employer participation in this effort through the development of a talent pipeline (why employers are here);
- To validate current qualitative and quantitative data findings regarding the industry (what the workforce needs are);
- To gather additional information to inform the development of customer-driven solutions (how workforce needs might be addressed); and
- To gather information regarding the prioritization of activities to address business needs (when solutions might be provided, or urgency of need).

Whom should we invite?

This will vary significantly based on the industry as well as the region. If this is a first round of these meetings, you may want to consider selecting employers which represent large, medium-sized and small companies, including representation from primary industry sub-sectors, and which also represent a geographical cross-section (if this is a regional or state-wide initiative). Understanding the diversity of issues prevalent within an individual industry will provide you with a better idea of the needs across organizational types. The occupational categories of individuals to be invited to be participants will vary based on the needs of the specific industry you are addressing and the size of the company, but may include:

- CEO, President, or General Manager
- Director of Human Resources, Training or Workforce Development
- Key Operations Managers
- Frontline Managers

You may also already be working closely with an employer from the sector that could serve as an "industry champion." This champion is ideally forward-thinking, positive and well-respected by other employers in the industry. S/he issues the invitation to other employers and potentially facilitates the first meeting and others down the road (or plays a lead, strategic role). This strategy helps you reach your ultimate goal of employers leading the work of the sector partnership.

What should be shared with employers before the initial meeting?

You will want the business leaders to have a clear idea of how they will spend their time and what they can expect from the meeting. Ideally, you can discuss with your industry champion the type and amount of information to provide that employers will find useful. Items you may want to consider sharing at least a week in advance include:

- 1-2-page document with an overview of the partnership, purpose of the employer meeting, and return on investment (ROI) for this meeting.
- 3-5-page labor market information document on the industry:
  - Quantitative background summary of data on industry and occupations (provided by CareerSource Florida or other data partner – but make sure to only use a consistent source for your data). Key data might include, although this list is not exhaustive:
    - Current and projected openings by key occupations and average wages for those positions
    - Number and location of training programs for those occupations as well the number of enrollees and graduates (for those programs)
- List of questions you plan to ask them

SECTOR PARTNERSHIP MEETING STRUCTURE & FACILITATION

Effective sector partnership meetings, ideally facilitated by an industry champion or neutral, respected convener, focus on pulling out key information from employers regarding their needs and challenges. As partnerships progress toward development of solutions, meetings will also focus on continuous validation of those needs ***and*** the curriculum, training program, outreach initiative or whatever solution is being developed to address the challenge at hand.

The questions below are provided to help guide an ***initial*** discussion regarding employers' workforce needs and challenges. A sample Sector Partnership Meeting Agenda (with guidance for meeting facilitators) is provided on page 7.

Possible Questions to Identify Employer Needs

Make sure the business leaders know what the questions will be before they arrive. Consider segmenting your questions into a logical progression. A proposed sample is below.

Workforce Challenges - Review of Current State Information (Industry champion or data expert presents highlights of document sent to employers prior to meeting.)

- Does the data provided in the industry summary document look correct to you?
- What is missing from this document? (see guided questions below)

Hiring Needs and Challenges - Guided Discussion

- What key industry (or technology) trends are driving your short and long-term workforce needs? What occupations are or will be most impacted?
- What are your 3 or 4 top occupation needs or skill gaps over the next year?
- What challenges do you face when hiring employees? (Probe for regulatory constraints, lack of a qualified pipeline of employees, permanent/temporary hiring challenges)
- What are the biggest changes you've seen in your talent needs? (Probe for the need for employees with different skill sets, advanced education or training, employees working remotely, or a contract basis, or part-time)
- What industry recognized certifications or credentials do you look for? Are you currently working with educational institutions on any training initiatives? What training programs do you need that are not currently available?

Solution-finding Questions

- What other topics or issues should be further addressed for talent pipeline development in your industry?
- How can we forge a stronger partnership with your company and your industry? How can we get more employers involved?
- How can we make working with us (educators/workforce/etc.) better for you? What are your top "dos" and "don'ts" to help us understand how to better work with you?
- What specific initiatives should we consider undertaking to build that partnership? What next steps should we pursue to best support you?

Sample Sector Partnership Meeting Agenda

- Welcome and Introductions*

- Old Business (i.e. recap of last meeting, if applicable)
    - Reinforce any conclusions or agreements the group came to in the last meeting.
    - Discuss the progress you have made, and the follow up on items you promised to the group, and give new members a clear sense of where the group is, and the direction you are all going.

- What Does the Industry Look Like Today? (industry data information prior to meeting)
    - Share not only the quantitative data you have identified from partners about what has happened in the past with regard to occupational changes, but also any information you have gathered directly from employers about what is happening in the present with current and projected future demand.

- Hiring Needs and Challenges Discussion
    - Make sure that you are truly listening to employers about their needs. Make sure you have informed employers of what to expect prior to entering the meeting

- Synthesize Key Themes & Identify Priorities
    - Draw linkages between what different members have said, and clarify any possible points of confusion or differences of opinion.
    - Identify what employers want to work on: what did they prioritize? What do they think should be the first thing the sector partnership tackles?

- Next Steps and Next Meeting
    - Convey that this is an ongoing effort, not just a project, and provide a commitment to action prior to leaving the room. Cover:
        - Next steps
        - Next meeting
        - Who else should be invited?

- Meeting Adjourned

**Ideally, the meeting is facilitated by an industry champion who will lead the partnership. It may be strategic to ask other partners to present data, discuss potential solutions, ask and respond to questions, etc., but the most effective meetings are employer-led.*

POST-SECTOR PARTNERSHIP MEETING: NEXT STEPS

What happens immediately after the meeting?

Send a thank you email to employers, ideally from the industry champion, with commitment to action to following the event. Make sure it is clear what they can expect as an outcome of the meeting. Some sample language is below.

- Thank you for your participation in this initial sector partnership meeting.
- Our next steps will be…
- Our next meeting will be…
- If you have questions, concerns or ideas, please reach out to me at any time to discuss.

After the thank you goes out, the convener moves forward by working with the partners to develop recommended solutions to respond to the needs identified by the employers. Those solutions are presented in concept form to the employer partners who will provide input to shape the actual proposed project or initiative. Throughout the development and implementation of the solution, the partnership should regularly meet to provide updates, seek out employer validation that the approach will meet their needs and to identify the next employer priority for the partnership to tackle.

MEASUREMENT OF SECTOR PARTNERSHIP IMPLEMENTATION

Why is it critical to measure sector strategy work?

Ultimately, for a sector partnership to be sustainable, it must measure progress toward meeting the needs of the partners. Measurement demonstrates progress, which proves value to employers and encourages their ownership of the effort. This progress also shows system partners the value in aligning resources and designing services that will be able to move their participants or students into family-sustaining careers. Both of these factors drive employers and partners to stay committed to the vision and implementation of the sector partnership. Finally, tracking outcomes ensures that the full benefits of the sector partnership can be communicated to stakeholders, funding organizations and the community.

What do we need to do to effectively measure sector partnership work?

A truly successful sector partnership meets the needs of its member employers. That is why it is critical to work with employer partners early on to identify the outcomes they want to see from the partnership. Keep in mind that you want to identify both short and long-term measures. Short-term measures allow for progress checks and the continuous refining of strategy to ensure the work is on track. Long-term measures are key to aligning work with the overall economic and workforce development goals of your community. Finally, it is important to establish baseline measures early on so that outcomes are meaningful. In other words, a clearly identified baseline helps a successful sector partnership say "look how far we've come!" (Please see the next page for sample sector partnership metrics.)

What are output and impact measures and do I need both?

Outputs are products generated by active sector partnerships. They are a clear "win" for a partnership and should be highlighted and shared extensively. Outputs are often short-term gains while impact measures may be more long-term in nature. Impact measures demonstrate real benefits to the members of the sector partnership for their businesses or programs. It's important to track and report out on both types of measure to sustain interest and engagement in a sector partnership.

Please see the next page for sample sector partnership output and impact measures for both employers and workers.

Sample Sector Partnership Measures

Outputs (typically apply benefit to both employers and workers):

- Leveraged funds
- Mapped competencies and career pathways
- Developed training programs
- Articulation agreements
- Industry outreach/awareness initiatives (ex. job shadowing programs for students/teachers, work-site visits, development of outreach materials such as videos, social media, etc.)

Employer Impacts:

- Reduced recruitment costs (ex. shortened time to hire)
- Lower training costs
- Reduced turnover
- Lower production costs
- Greater promotion potential of entry employees
- Higher quality customer service

Worker Impacts:

- Increased earnings
- Increased hours worked
- Increased # receiving industry-recognized credential(s)
- Increased # placed in employment in training-related field
- Greater access to employee benefits, such as health care and leave
- Improved job retention