

**Pee Dee and Regional Partnership
Board Standards Retreat
The Journey to Standards**

November 15, 2007

Introduction

The Pee Dee and Regional Partnership boards met jointly on November 15, 2007 to review North Carolina's new board standards with the intent to develop a plan of action to meet the new standards requirement by July 2008.

Board members worked through a set of questions to review their work to date and to determine the relevancy of the strategic goals that were put in place in 2005.

Attendees next worked through a review of the standards requirements to determine where gaps exist and then developed strategies to close the identified gaps.

The information that follows provides the work of the board retreat. In addition, an appendix is included outlining the boards' 2005 strategic goals, and the NC Board Standards.

Status Review Questions

1. What has changed in the region since the SOW was published, both good and bad that could impact our work as a board?
 - a. BRAC planning
 - b. Piedmont Partnership WIRED grant
 - c. Plant closures
 - i. Sarah Lee
 - ii. Burlington
 - iii. Unilever
 - iv. Numerous small closings
 - d. Dell Computer

2. What is the one most important issue we must work on over the next 3 years?
 - a. Look at how both boards can impact our youth to go beyond High School to complete post-secondary enrollment
 - b. Better focus and placement of our incumbent worker grants to support economic development retention strategies
 - c. How to better utilize our Community College and Career and Technical Education resources for High School graduates and adult re-entrants
 - d. Better use of data (SOW and LMI) we have at our disposal to become better informed and for prioritizing our workforce resources
 - i. Which jobs are getting filled?
 - ii. Which jobs are vacant
 - iii. Where are the gaps in skills vs. demand

3. Are the strategic goals from our 2005 plan relevant based on above questions?
 - a. YES, very much so, but with some updating and editing

4. How do we use the work of the board (our goals) to meet the new board standards?
 - a. Take credit for the work completed and the products we have in place from 2005-06
 - i. They fill much of the required points in the standards assessment document
 - b. Refine regional definition but consider new points of outside influence, in three directions (both boards are part of larger labor markets)
 1. Winston/Greensboro/Burlington due to WIRED
 - a. Alamance
 - b. Montgomery
 - c. Randolph
 2. Durham/Raleigh due to labor market definition
 - a. Orange
 3. Toward Fayetteville due to BRAC planning
 - a. Montgomery
 - b. Moore
 - c. Richmond
 - ii. Improve collaboration efforts
 - iii. Improve partnership building, i.e., expansion of new partners due to BRAC and WIRED influences
 - iv. Update State of the Workforce data
 - v. Create measures of success for each goal area

Review of Standards Document: Gaps in Existing Work

A. First Thoughts After Review

- ◆ Need for non-board member involvement in our work and on committees
- ◆ Reach out and look to other boards for collaboration and for sharing resources to overcome workforce challenges
- ◆ Document what we have done to satisfy needs of the standards

B. Gap Identification/What We Must Do

I. Defining the Region

- ◆ First, combine the efforts of the two existing boards towards common goals – Pee Dee and Regional Partnership
- ◆ Then, look to include portions of other boards, i.e., Cumberland, Lumber River, Guilford in our efforts

- ◆ Use cross membership efforts in BRAC and WIRED meetings to engage in collaboration efforts
- ◆ Wear our board hats as we attend meetings across the region
- ◆ Strengthen our county involvement in major board and regional initiatives

II. Data Base Assessment

- ◆ Update, by July 2008, the SOW appendices with most current data (initially created in 2005)
- ◆ Highlight most important delta changes (increases or decreases in trends) in data
- ◆ Republish, distribute, and link on board website
- ◆ Recreate business services handout
- ◆ Create a "Data for Dummies" summary

III. The Product (the 2005 Strategic Plan)

- ◆ Update all dates, goals and measures, to reflect a new plan to 2010
- ◆ Create accountability models to execute the strategic plan
- ◆ Document work to-date that can be used as evidence of work toward standards
- ◆ Organize Adhoc committees around each goal to include board member and non-member
 - ◆ Require each committee to plan 12 month action plans against each assigned goal strategy
- ◆ Hold a planning retreat annually to review committee work accomplished and to plan for the next year's work
- ◆ Distribute the plan to joint boards' stakeholder groups for adoption

IV. Measures

- ◆ Update deadlines to 2008 - 2010
- ◆ Request planned periodic status reports from committees, staff, and workgroups on accomplishments
- ◆ Update measures to match goals as they change

Appendix

A. 2005 Strategic Plan Goals

Goals for the Workforce Development Boards

The work of the Boards will be supported by a “can do” attitude of leadership and partnership building needed to improve the quality of life for the citizens in the Pee Dee and Regional Partnership regions. Our preferred future is for the regions and their citizens to have opportunities for good paying jobs, for businesses to move into the regions bringing good paying jobs, and for people to move to (or back to) the regions because of the opportunities. Our success will be measured by the progress made in the regions toward this preferred future.

Priority Goals

The Boards have worked diligently to create a strong organizational foundation to be able to identify and manage the region’s workforce issues. The intent is to move decision-making concerning workforce needs and employment and training services to the level that could best determine those needs and respond accordingly.

As the JobLink service delivery system continues to evolve, the Boards will become more strategic in its work. The Boards have the opportunity to forge collaborations and be the convener for conversations around finding solutions to workforce, education, and economic development issues in the region. Led by the private sector, the Boards are a unique mix of public, private, and civic representation. If developed and positioned properly, the Boards can influence change in our communities’ approach to the many factors that affect the economic, educational, and social viability of our communities.

We have some serious conditions in our regions that adversely affect employment opportunities and the quality of life for too many of our families. The Boards feel a sense of urgency to begin to provide the leadership, and to reach out to other leaders in the regions and in Raleigh, to begin to peck away at the things that are holding us back. This is a long-term challenge, but we must begin now.

Thus, we offer the following goals as a starting point in this journey. These initial goals are responsive to the regional data and community perspectives from the local forums that form the issues we must address. The Boards’ intent is to establish goals that are realistic, doable, and that will be only the beginning of longer-term goals and strategies to be assessed and updated each year.

Strategic Plan Issues and Their Goals

Integrating Collaborative Efforts

Issue Statement: At present, educational institutions, workforce training providers, economic developers, elected officials, community organizations, employers, and chambers of commerce are working separately in pursuit of their own goals. This creates "chaos" and confusion, thus, valuable resources are used ineffectively.

Goal: The Boards will convene the above groups to create awareness amongst citizens and elected officials of the issues facing this region

Assignment: Adhoc group reporting to the boards to:

1. contact elected officials and chambers of commerce to bring groups together
2. recommend and implement changes from the *state of the workforce report*
3. identify and secure resources to effect changes
4. target one major region workforce issue for implementation in 2006

Measurement: Our measures of success will be to:

1. convene group(s) before end of 2005 with at least ½ of those invited to attend
2. demonstrate consensus that there are problems in need of attention
3. identify a project to undertake in 2006
4. undertake project in 2006

Workforce Issue Awareness

Issue: There is a general lack of what the workforce issues are and their overall impact on our economy and quality of life. Too many of our regions' citizens and stakeholders have a lack of understanding and have low expectations in the areas of required job skills, levels of education required and the impact of low work ethic.

Goal: Communicate workforce issues reported in the *state of the workforce report* and educate the community on their implications to our region

Assignment: Adhoc group in each county reporting to the boards to:

1. create awareness of issues through various media formats and outlets
2. create a speakers' bureau with access to a "canned" presentation to present to stakeholder groups
 - a. PTOs
 - b. Senior citizens groups
 - c. Rotary and Lions clubs

- d. Education groups and entities
- e. Local elected officials
- f. Faith based ministries
- g. Ethnic groups

Measurement: Our measures of success will be:

1. presentations made (number and group type)
2. evaluation of the process to determine level of awareness
 - h. surveys
 - i. forums

Meeting Employer Needs

Issue: The region is failing to meet the emerging needs of employers to provide them with the adequate numbers of employees who possess the required skills, education, and attitudes.

Goals: We will:

1. improve awareness of the issues of employers to all education providers
2. decrease the dropout rates
3. establish a curriculum to improve life skills of potential employees

Assignment: Adhoc group reporting to the Boards

Measurement: Our measures of success will be to:

1. conduct two education forums by end of first quarter 2006
2. decrease dropout rate by 10% by end of 2010

expand life skills curriculum and require ALL school systems to implement by school year 2006

Community Engagement

“Without engagement there is no lasting change.” Michael Porter, professor, MIT

To create the lasting changes needed by the Pee Dee and Regional Partnership, community engagement is a necessity. During the strategic planning process, representatives of both Boards created a set of strategies and actions to effect community change through engagement. Following is the plan:

Strategies:

1. Create a campaign for change
2. Develop marketing presentations
3. Place articles in newspapers and periodicals
4. Meet with community leaders one-on-one

Actions:

1. Publish the *state of the workforce report* with an Executive Summary to all stakeholder groups and place on website of the Boards for general access by the public
2. Gather group of stakeholders and present the findings of the report

Measurements:

- By the end of 2005, we will accomplish the stated actions above

Resources Required

1. Cities and counties grants (funding)
2. Volunteers to serve on Boards Adhoc committees
3. Marketing dollars from WIA

B. NC Standards

High Performing Local Workforce Development Boards

Technical Assistance Guide

Introduction

The North Carolina Commission on Workforce Development has adopted standards for the state's workforce development boards. Prior to any official reviews to determine compliance with those standards, local workforce development boards will be reviewing their own activities to determine where they stand with respect to meeting the standards and to determine, as necessary, what work remains to be done to achieve compliance prior to the commencement of official compliance reviews. This Technical Assistance Guide is intended to assist boards by providing definitions and explanations of terminology used in the standards to ensure uniform understanding of the products required by those standards.

Background

The standards for high performing local workforce development boards were adopted at the August 23, 2006 meeting of the Commission on Workforce Development. The standards will become effective with the Program Year beginning July 1, 2007. However, the period between now and June 30, 2008 will be used by local workforce development boards to review their positions relative to the standards and take any actions necessary to position themselves to meet the standards by the time formal assessments begin after July 1, 2008.

A basic tenet of the Commission on Workforce Development is that all local workforce development boards should be in a position to meet the standards. That is, there is no intent to differentiate among boards (some better than others) or to set up a system where there are intentionally some winners and some losers. The ideal outcome would be for all boards to meet the standards during the first year of implementation. Thus, there is a long preparation period and a phased approach to implementation. Some local workforce development boards may have more work to do than others.

While consisting of seven different elements, the standards can essentially be broken down into those that address the strategic activities of local workforce development boards and standards that address compliance activities. The compliance activities are straightforward and should be things that local boards have been doing all along. There may need to be an explanation of what time periods are covered when reviewing compliance, but the activities themselves should not require much additional discussion. The focus needs to be on the strategic intent of the first three standards. This Technical Assistance Guide will concentrate only on the strategic responsibilities.

Strategic Activities and Areas of Emphasis

At the outset, it is useful to put into context the emphasis being placed on the strategic responsibilities of local workforce development boards. In brief, under the Workforce Investment Act (WIA), local boards have two levels of mandatory responsibilities and one level of opportunities. Overseeing the WIA Title IB funds and overseeing the JobLink Career Centers System are the legislatively mandated activities. Being the workforce strategic body for the area served, while not mandatory under federal law, is taking on a mandatory character in many states. In this strategic role, local boards can enhance their role beyond the limited funding streams they control. When boards take charge of setting strategic workforce direction, aligning disparate funding streams, engaging employers in sectoral initiatives, and beginning to look across political boundaries to labor markets, there is huge potential for them to make a significant difference in their communities. The planning envisioned in the standards is wholly different from the plan required under WIA. **This strategic effort cannot be accomplished through the five-year operational plans local boards submit for WIA funding.**

North Carolina is setting an aggressive workforce agenda to address a myriad of issues facing the state and is looking to local workforce development boards to be leaders in helping to advance this agenda. A few key themes are emerging from the state that are relevant to the implementation process. First, there is a major emphasis on regionalism. This trend is national in nature, and an appropriate one. It recognizes that businesses and clients don't act, as labor market participants, within the boundaries of most local workforce development boards. They have much broader commuting patterns and businesses have broader recruiting patterns. Therefore, a key component of the standards is an emphasis on acting regionally.

The second major theme is related to building strong partnerships. Local workforce development boards cannot carry out their strategic roles alone. They must engage and work cooperatively to both leverage funds and to align goals. This theme is clearly embedded in the standards.

A word about current and future emphasis is appropriate. Sectoral initiatives will be a large part of the emerging workforce agenda. Though not specifically mentioned in the standards, they are implied in the industry analysis required. Local workforce development boards would do well to look at how they can employ sectoral approaches in their strategic planning efforts, track the emerging state strategy on sectoral initiatives, and incorporate them and other locally defined sector approaches into their strategic planning.

The standards themselves are designed to focus on local strategic planning processes. Key characteristics of good local processes are inherent in the standards. They are:

- inclusive of all the right players in an area
- have a true community input component with a feedback loop about what is happening

- data driven
- public in nature (they result in some form of document that is publicly available)
- regional and thus may extend beyond a local workforce development board's boundaries (Defining the region should be driven by the data analysis about the labor market served and not by the jurisdictional boundaries.)
- keyed to broad measures of community workforce "health" and progress
- "living" documents and processes that are updated periodically and drive actions by the local workforce development board
- connected to regional/local economic development goals

The first element below on defining the region is a linchpin for all that follows. It assumes that strategic efforts are labor market based. A board may be meeting the other elements on data-based assessment, but if it is not happening on a regional level that, where appropriate, extends beyond the local workforce development board's boundaries, change will be required. In this situation, the board should be working towards forming new relationships and extending its reach to collaborate with at least one other local workforce development board.

Strategic Planning – Defining the Region

Define the relevant labor market(s) that your local workforce development board serves.

What data was used to arrive at the labor market(s) definition?

Is there agreement among key stakeholders that this is the right definition of the labor market(s)? What evidence of agreement is there?

The analysis may indicate that there are multiple connections with several other local workforce boards that should be pursued. Achieving this level of strategic planning and alliances represents the ideal and should be the long-range goal of all local workforce boards so impacted.

The Commission would like to see all local workforce development boards in a position to meet the standards during the initial assessment period after July 1, 2008. To that end, the minimum requirement to meet the standards for this first period of implementation is that the region be identified, and if the region extends to include multiple local workforce development boards, the local workforce development board is in full collaboration with at least one neighboring local workforce development board. The Committee recognizes the extent of effort full regional collaboration could entail, especially for local boards that touch more than one labor market. Therefore, the first year of implementation will minimally define success as collaborating with one other local workforce development board where labor markets dictate. This step should set

the stage for and provide experience with inter-board collaboration that will be instructive for gaining full regional strategic coverage in the future.

It should also be noted that several local workforce development boards are engaged in broadly defined regional collaborations that extend well beyond their labor market boundaries. The Commission encourages local participation in such efforts, as it does participation in planning efforts with the economic development regions. If such participation results in a planning process with full partner participation and clearly measurable goals, then the regional test would be met.

Essentially, while the Commission recognizes the need for a truly regional emphasis, this recognition is balanced by the reality of where many local workforce development boards are today and acceptance that any movement outside the local board's boundaries is a big step forward that will represent success during the initial standards implementation period.

Strategic Planning – Data-based Assessment (AKA Community Audit or State of the Workforce Report)

What study of the region is being used to drive the local workforce development board's strategic planning and actions? Note that this question relates to the region referenced in the section above. It is possible to use a combination of studies that cover different contiguous areas, but that is not an easy path since ownership is typically split. The study should encompass the full region, but the collaboration expected in other standards may not extend to the full regional boundaries and may minimally involve only two local workforce development boards working collaboratively.

When was the study completed? If it is more than a year old, has it been updated in any way?

How was the study made public? Was it published in some form or displayed on a website?

Is there a schedule for further updates? If so, what is the schedule?

Strategic Planning – The Product

A core assumption is that the local workforce development board has a strategic plan in place and that it resulted from a structured planning process. It may be a joint plan with other local workforce development boards or with other entities, but it should exist as a product. That product should cover the region as described above or, at a minimum, demonstrate collaboration between two local workforce development boards where any of the local workforce development board service area is part of a larger labor market. The process that led to the plan should be clearly defined.

Describe the process used to arrive at the strategic plan.

Identify the local workforce development boards participating in the joint process, where appropriate.

Name the stakeholder organizations that participated in the process.

What was their level of involvement? (e.g. participation in a planning retreat, commenting on a planning document, joint sponsorship of events, etc)

How was the plan publicized? This step could have readily been combined with the data assessment and may have been published as one document.

What workforce issues for potential focus emerged from the process? List the menu of options.

What issues were selected for local workforce development board focus? Why were these selected?

What are the elements of the action plan developed by the local workforce development board to address the issues identified?

Strategic Planning – Measures of Success

The core assumption here is that the strategic planning process resulted in clearly defined measures of success that cover the initial strategic area, which may be a minimum of two local workforce development boards where the local workforce development board's service area is part of a larger labor market. These measures of success are **NOT** the same as the WIA performance measures or measures of JobLink efficiency.

List the key measures identified from the strategic planning process. Examples could be reducing high school dropout rates; increasing business retention in key sectors; improving education levels of key cohorts in the population and; integrating work and learning to build a stronger incumbent workforce. There is no right or wrong answer here, but there should be an answer that identifies one or more major goals that the local workforce development board is working towards.

Describe how the measures are updated? How often do you get feedback on progress?

What proxy measures do you have for some of the long range goals that can be tracked on a more current basis? (e.g. for high dropout rate reduction, grade advancement might be tracked since it has been linked to whether a student stays in school or not)

Describe how the measures are made public.

Describe the process for reviewing the measures for appropriateness, given changing local context.

In order to help gauge what it might take to meet the standards, a hypothetical timeline is provided that assumes a local workforce development board is starting from a point where no actions have been taken to create a strategic plan. This timeline assumes a linear progression along the four key elements.

Month 1 - Assemble data to help guide the decision making process about the region.

Month 2 – With other stakeholders, define the relevant region and identify the other key entities (e.g., other local workforce development boards) that need to be involved. Identify the initial area of focus, which must include at least one other local workforce development board area if so indicated by the analysis.

Month 3 – Convene the right stakeholders from across the entire region or the selected multi-local workforce development board area of focus to set up a timeline and a strategic planning process. Appoint a steering committee to guide the process.

Month 4 – Assemble data relevant to the region or designated multi-local workforce development board area of focus, then determine what data gaps need to be filled or what data sets need to be updated. Determine resources needed to complete the strategic planning process and create the plan to fund or staff the process.

Month 5 – Complete the data gathering.

Month 6 – Analyze the data and develop a menu of key workforce issues that should be addressed.

Months 7 – 8 – Hold internal discussions with the steering committee to determine which issues will be pursued.

Months 9 – 12 – Gain consensus from all the relevant stakeholders on the key issues to be addressed. Hold the appropriate level of community input sessions.

Months 13 – 15 – Create the overall strategic plan, including action steps with measures, and seek input from relevant stakeholders (may be through the steering committee).

Month 16 – Publish the plan in some way that makes it generally available to the public.

The above steps assume a very aggressive timeline and would take substantial dedicated resources to accomplish. The timeline may be affected by the timing of meetings with various stakeholder groups that need to concur with the plans. It will likely be advantageous to delegate much of the day to day work to a steering committee and only bring the full local workforce development board into the major decisions. Other options may include distributing materials for review between meetings, seeking comments, and voting on certain elements by phone or e-mail.

The month designations are only intended to be a broad guide. In some areas, it may take longer. Since the first external assessment of local workforce development board compliance with the standards will occur some time after July 1, 2008, local workforce development boards may have more time to complete their strategic plans. Where more time is needed, affected local workforce development boards should negotiate extended review schedules with staff of the Commission on Workforce Development.

Resources Needed

Based on each local workforce development board's review of its compliance status, it may be advisable to outline staffing and resource assumptions as early as possible in order to make internal re-alignments where necessary and to seek any necessary external assistance or support. Local boards should look to internal resources first to fund such efforts but may identify needs they cannot cover as part of their plans. Any external resources or assistance needed should be identified to the Commission's Boards and Commission Capacity Committee.