

PRELIMINARY IMPLEMENTATION PLAN FOR FOUR PRIORITY SEWIB INITIATIVES

Introduction

In follow-up to our last SEWIB meeting, Mt. Auburn has prepared a preliminary implementation plan for four initiatives identified as priorities by the steering committee. These are: 1) a regional workforce development initiative in the healthcare sector; 2) a “human capital awareness” campaign; 3) a regional workforce development information mechanism; and 4) a regional learning and networking initiative. For each initiative, we have outlined the basic components, potential partners, resource and management needs, and suggestions for implementation. Where appropriate, we have also presented models of relevant existing programs from other states and regions.

Following the write-ups on the four initiatives, we present a set of implementation questions. We would like to use those questions as the basis for our Wednesday meeting as a way of further clarifying how you want to approach implementation of the initiatives.

Regional Workforce Development Initiative in the Healthcare Sector

There is a strong rationale for undertaking a region-wide workforce initiative in the healthcare sector. The healthcare labor market appears to have a strong regional character, with a significant amount of workforce mobility across WIA boundaries. The sector provides a large number of jobs¹ in diverse occupations with potential for career advancement. There continues to be strong demand for labor, particularly in certain occupations such as skilled nursing, and demographic trends are likely to lead to increasing workforce demands in the future. The leading educational institutions in the healthcare field serve students and employers in multiple WIAs. And training initiatives such as NUCLI are becoming more regional in focus. A comprehensive regional initiative would be designed to build on these fragmented activities, increase their scope and scale, utilize existing resources more effectively and efficiently, tap additional resources, and more fully engage employers

What should a comprehensive regional initiative look like and how should it be organized? Below, we briefly describe two health sector workforce initiatives, one a state-level effort in Oregon, the other a regional effort in northeast Ohio, to provide examples of how it has been done elsewhere. We also have more detailed information about these initiatives, including the strategy documents that were developed. But there is no one model or approach. An initiative in southeastern Massachusetts will be shaped by regional labor market conditions, the regional and state resource and policy

¹ Healthcare is the largest employer in four of the five WIAs and second in the fifth at the 2-digit SIC code level.

environment, and the particular needs, issues, concerns, and commitments of regional stakeholders. Among the issues that surfaced in the course of our research that could be addressed through a regional initiative include the following:

- lack of solid data on occupational demand at the regional level;
- shortages in nursing and other critical occupations;
- the need to build on current initiatives to develop career ladders;
- inadequate capacity in nursing and other educational programs – teachers, facilities, and clinical sites;
- difficulties with articulation agreements/transfers among educational institutions;
- the need for new training delivery methods (e.g., distance learning);
- the need to broaden training initiatives to involve more small employers.

While the exact character of the initiative cannot be prescribed, certain principles should guide you. Most importantly, the initiative must be “demand-driven.” This means that it must have strong buy-in, leadership, and resource commitments from within the healthcare industry itself. Second, it must be grounded in solid research and analysis, with a thorough understanding of the supply and demand side of the labor market, the full range of public and private workforce development resources, and where gaps and mismatches exist. Third, there must be a participatory process whereby all key regional stakeholders develop a common understanding of the issues involved and develop a consensus around appropriate solutions. Fourth, there must be a clearly articulated strategy with measurable outcomes. And, fifth, there must be effective mechanisms for implementation, with appropriate implementation resources and institutional structures, and accountability for results.

Models

Oregon Health Care Sector Employment Initiative

In 2001, the Oregon Workforce Investment Board undertook the *Oregon Health Care Sector Employment Initiative* to alleviate skills and staffing shortages in the healthcare sector. The sector was selected because it was faced with high job growth, high turnover, and an aging workforce. The goal was to identify the demands of the industry that were not being met and to develop strategies to assure an adequate supply of appropriately skilled workers and jobseekers in targeted occupations facing critical worker shortages.

A *steering committee* made up of key stakeholders was established to direct the initiative and review the work of three “strategy teams” that identified issues and proposed strategies in their respective areas of focus. A *workplace issues team*, composed of employers, healthcare organizations, labor organizations, and representatives of regulatory boards, addressed workplace conditions and regulatory issues that pose barriers to healthcare employment. An *employment strategy team* composed of WIBS, workforce development providers, state agencies, labor economists, CBOs, employers, and labor representatives, addressed recruitment, retention, and

advancement issues. And an *occupational training and education team*, composed of representatives of K-12 systems, higher education institutions, private career schools, and state training programs, addressed issues around educating and training healthcare workers, including capacity, delivery methods, and recruitment.

The process of developing and implementing the strategy involved five steps: 1) conducting research and analysis; 2) convening stakeholder teams to identify issues, barriers, opportunities, and best practices; 3) drafting a strategic action plan; 4) holding a summit to get public comment and build support; and 5) implementation – developing curriculum, designing programs, building resource plans, etc.

Action recommendations addressed: 1) increasing capacity in the educational system to meet training needs; 2) increasing accessibility to training by expanding delivery methods, e.g., through distance learning and simulation centers for clinical training; 3) maximizing student mobility through articulation agreements, common curriculum, and clear and enhanced career pathways for students and incumbent workers; and 4) maintaining quality with stable investment in programs and student assistance.

Northeast Ohio Health Care Employment Network

The ***Northeast Ohio Health Care Employment Network*** is a comprehensive employer-led initiative recently established to address healthcare industry workforce needs in a three-county region of northeast Ohio. The initial impetus for the initiative came from the Mahoning and Columbiana Training Association, the workforce investment board serving two of the three counties. Recognizing the importance of the healthcare industry to the region and critical staffing shortages in nursing and other health occupations, the WIB director took the lead in organizing a Regional Healthcare Workforce Summit. With funding and in-kind support from major employers, higher education institutions, economic development organizations, and local governments, a steering committee was established with over 40 representatives of industry, workforce investment boards, career centers, economic development organizations, local government agencies, higher education institutions, other training providers, organized labor, and community-based organizations.

In preparation for the summit, a study of healthcare industry employment and related workforce development resources was completed. The study helped to identify critical issues to be addressed at the summit. The summit, held in October 2002, was attended by about 250 participants, including employers, educational institutions, other workforce service providers, and government. About one-third were employers. The summit agenda included presentations by regional industry leaders and healthcare workforce experts, and a set of breakout session at which participants discussed a range of critical industry workforce issues.

Based on issues identified in the research and at the summit, the summit organizers completed a Workforce Development Action Plan in early 2003. The plan is composed of four major strategic initiatives, each with a set of goals, objectives, and action steps. The four strategic initiatives are: 1) enhancing image and communication

to increase recruitment of new workers; 2) addressing skill development and career advancement; 3) supporting worker retention; and 4) strengthening collaboration among key stakeholders.

The Network was officially established to implement the Action Plan. The Network is governed by a 15-member Employee Advisory Council and staffed by a paid coordinator. During the first half of 2003, it formed action teams to work on two of the strategic initiatives, career pathways and collaboration. It recently piloted a program involving career development in medical office occupations.

Components

The components of the initiative will be shaped by the strategy development process and the needs, concerns, and priorities of key stakeholders. Based on initiatives in other regions and the needs and issues already identified in southeastern Massachusetts, a regional initiative might include the following strategy components:

- ***Improve recruitment of healthcare workers:*** undertake regional outreach and recruitment activities; target non-traditional workers (gender, race, ethnicity, age); conduct career awareness and development activities for K-12 students; develop skills assessment tools; develop and disseminate occupational demand information; expand contextual adult basic education, occupational training and work readiness programs, provide support services.
- ***Increase educational capacity:*** expand and improve facilities, (classrooms, distance learning, clinical sites), address faculty shortages, develop partnerships among learning providers and between providers and employers; expand and simplify articulation agreements; develop new funding mechanisms.
- ***Facilitate career development efforts:*** make training more accessible and flexible; structure educational programs to support mobility and career pathways; provide support services.
- ***Enhance retention and work environment:*** increase employer-supported professional development opportunities; improve work environment; restructure internal human resource policies and practices to build career ladders.
- ***Advocate for more supportive public policies:*** improvements in labor market data; increased support for school-to-career initiatives; reforms in state higher education policies; increased flexibility in state training programs.

Partners

To successfully launch and sustain this initiative, SEWIB will need many partners. Most importantly, the region's healthcare employers must be convinced of the benefit of the initiative and be willing to actively support it. At the outset, it will be important to gain the strong support of five to ten senior industry leaders with a good distribution in terms of both geography (covering the five WIAs) and industry segments (hospitals, extended care, medical offices). Then, as the initiative develops, it will be important to bring other employers on board.

Obviously, a good place to start is with the industry representatives on the WIB boards and other major health systems. The latter include *Caritas Christi Healthcare* (includes Caritas Good Samaritan Medical Center in Brockton, Saint Anne's Hospital in Fall River), *Southcoast Health Systems* (includes St. Luke's Hospital in New Bedford, Charlton Memorial Hospital in Fall River, Tobey Hospital in Wareham, and VNA of Southeastern MA), *Cape Cod Healthcare* (includes Cape Cod Hospital, Falmouth Hospital, VNA of Cape Cod), and *Jordan Health Systems* (includes Jordan Hospital, Cura VNA). Some of these systems, notably Southcoast and Cape Cod Healthcare, also own a number of extended care facilities.

Aside from individual employers, another way to gain industry involvement and support is to solicit the participation of industry and employer organizations. There are at least three statewide industry associations that could become involved: the Massachusetts Hospital Association, the Home & Healthcare Association of Massachusetts, and the Massachusetts Extended Care Federation. The regional chambers are another set of potential partners. These organizations recognize the importance of the healthcare industry to regional economic stability and quality of life, and might also be a useful vehicle for outreach to smaller healthcare employers including medical and dental offices.

Another important set of partners will be learning providers, including higher education institutions, private proprietary providers, community-based organizations, and K-12 systems. The region's public higher education institutions will play a very important role. They are not only leading providers of degreed educational programs, adult basic education, and customized training, but can also provide valuable research on the healthcare labor market, resources, and policy issues. A good way to engage them might be through Connect, an organization recently formed by the region's six higher education institutions to pursue better integration of academic programs and other common issues. Other regional or sub-regional groups representing segments of the learning provider community should also be identified and engaged. The Southcoast Educational Partnership, which is supporting improvements in K-12 education in New Bedford, Fall River, and surrounding communities, is one such organization.

Existing collaboratives of educational institutions and learning providers involving healthcare training could also be engaged. These include the regional NUCLI partnership, which has a 50-member advisory committee (with many of the same organizations that could be involved in a more comprehensive initiative), and the Southeast Joint Deans and Nursing Executive Group, which includes representatives of the three community colleges, four healthcare systems, and two independent hospitals.

Unions representing healthcare workers should also be involved. Local 767 of the SEIU Hospital Workers Union has worked in partnership with Cape Cod Hospital on a career ladders programs since 1983 and is also involved in an ECCLI grant at the Windsor Skilled Nursing & Rehabilitation Center. There may be other local unions that should also be involved.

Another important partner should be state government. This initiative will be the first region-wide healthcare workforce initiative in the state and may serve as a model for other regional initiatives. Key state agencies, including the Department of Employment and Training and Commonwealth Corporation should be invited to participate in the planning process, and state funding for research and pilot programs should be sought. If the regional competitiveness councils are established, they too could be involved in some form.

Resource and Management Needs

There are three different resource and management needs associated with the initiative:

1. **Initial organizing.** An outreach effort will have to be organized, starting with industry leaders. This will involve preparing a concept paper introducing and making the case for the initiative, and holding meetings with leading employers and other key stakeholders. SEWIB members will have to work together to develop an outreach strategy, prepare the concept paper (either internally or with outside assistance), and organize meetings with stakeholders. Each WIB director will have to take responsibility for some of the meetings.
2. **Initiative oversight.** If there is sufficient interest to proceed with the initiative, resources will be required to convene stakeholders at appropriate times and venues, conduct research, and develop a strategy.
3. **Implementation.** Once a strategy is agreed upon, funding and management capacity will have to be secured for implementation of particular programmatic elements emerging from the strategy. This will likely require hiring a sector organizer.

Implementation Suggestions

SEWIB could use the following approach in implementing this initiative.

1. **Develop concept paper:** Start with the concept and put together a concept paper and a PowerPoint presentation that would describe what you want to do, why it is important, what the key regional issues are, models from elsewhere, and how you intend to proceed.
2. **Identify and engage a leadership group:** The most critical step will be to approach employers to gauge interest and build support. There has to be a threshold of employer interest to drive the effort. These meetings should be held one-on-one with key leaders from local healthcare institutions. Following the meetings, these individuals should be contacted and a core group of leaders identified. If there is no leadership interest, moving ahead will make little sense.
3. **Hold a summit:** Once leadership is engaged, the effort should focus on broadening the stakeholder group and identifying key issues. This can be accomplished through holding a regional summit with a specific agenda. The outcome of the summit should be a set of issues for further convening of a broader set of stakeholders and

commitment of stakeholders to participate in a more formal working group to oversee a specific initiative.

4. **Follow-up:** It is critical that you do not lose momentum following the summit. Working with the leadership core, a steering committee and work groups should be organized. Following up on the issues noted in the summit, additional research should be conducted and strategic directions identified. Finally, a workplan and fundraising plan should be developed based upon the strategic directions

Human Capital Awareness

While it is clear that one of the most critical issues facing the region is its ability to ensure that its workforce has the skills needed in the new economy, most policymakers, residents, and businesses do not fully understand the implication of this message. Those in the economic development field do not fully recognize that we cannot attract new businesses to the region without assurances that the skilled workers are here. Many parents do not realize that their goal for their children should no longer be a high school degree. A post secondary degree, or some further credential, is now required to ensure a middle class lifestyle. And, many businesses, focusing on short-term competitiveness issues, do not fully appreciate the skills crisis. It is important to enhance the general understanding of these critical human capital issues amongst residents, businesses, and policymakers.

Model

The Human Capital Policy Initiative (HCPI) is a special program of the University of Pittsburgh's Institute of Politics (IOP) that mobilizes speakers to make presentations about the importance of human capital to a broad range of community leaders throughout the nine-county southwestern Pennsylvania region. HCPI was launched in September 2000. It currently has four presentation modules:

- *Human Capital and the Changing Economy: The Rules Have Changed*, focusing on economic trends driving increasing workforce skill demand and the growing linkage between economic development and workforce development policies;
- *Market Dynamics*, outlining the components of the labor market and describing the regional supply-demand mismatch and skills gap;
- *A Healthcare Case Study: Supply-Demand Mismatch*; and
- *Regional Development: Who are the Players?*

Between January 30, 2001, when it made its first presentation, and February 28, 2002, HCPI made 121 presentations to over 3,200 people. In order to deliver its message, HCPI has established a number of significant partnerships. Through a relationship with the Rotary Club, the two Rotary districts in HCPI's target market have underwritten the mailing costs of HCPI promotional packages to clubs and highlight HCPI in weekly email news briefs to club presidents. HCPI has also entered into a partnership with the Pittsburgh Public Schools and Junior Achievement of Southwest

Pennsylvania. In addition to these relationships, HCPI has made presentations to a wide range of organizations, including all four of the region's Workforce Investment Boards, one-stops, community-based workforce development providers, school districts, individual schools, educational policy and professional organizations, civic organizations, chambers of commerce, and a few individual employers.

Components

The specific goals of this initiative would be to:

- inform the political, governmental, private, and educational leadership of southeastern Massachusetts about the critical importance of investing in human capital;
- provide a forum where policymakers from various sectors can engage in informed, open discussions on this matter;
- encourage substantive linkages among elected officials and Workforce Investment Boards to nurture a regional perspective on human capital development;
- develop a regional infrastructure of public/private sector leadership on human capital investment; and
- act as a catalyst for a community conversation on the importance of human capital in regional economic development.

The major activity of the effort would be to make presentations throughout the region that engage local residents, businesses, and organizations in a dialogue around a set of human capital issues. The presentations would be marketed through phone calls, mailings, and networks of contacts. In addition to making the presentations at meetings, a regional Website could host the presentations on-line.

Rather than having a large staff, most of the activities would be undertaken by volunteers who agree to make presentations on human capital issues at community forums throughout the region. Speakers would receive an orientation and training session and have access to a "virtual office" that facilitates project communications and coordination and provides ongoing technical assistance.

Partners

While SEWIB could serve as the institutional focal point for the initiative, it would involve a wide range of potential partners including:

- higher education institutions;
- chambers of commerce;
- school districts;
- municipal government;
- Rotary, Kiwanis, and other civic organizations; and
- community-based organizations.

Resources and Management Needs

This initiative could require relatively few resources. In Pittsburgh, much of the work is done by volunteers who are asked to make presentations at various community meetings and events. The major resources would be for coordination of volunteers, the development of the PowerPoint presentations, outreach and marketing, and coordination of events.

Implementation Suggestions

SEWIB could work in partnership with an academic institution to develop and manage the effort, including organizing the partners and putting together the presentations. The most likely candidate would be UMass Dartmouth, which has the research capabilities through the Center for Policy Analysis and engages in a range of regional civic and economic development activities through Paul Vigeant's office. Or, UMass Dartmouth and Bridgewater State University could work jointly on scheduling presentations and enlisting volunteers. Each institution has its own set of institutional relationships and geographic emphases, which might complement each other well. There should also be an advisory committee made up of representations from the academic community, the workforce community, and the economic development community.

Regional Workforce Development Resources Information

One of the more important infrastructure needs to an effective workforce development system is the availability of quality information that is readily available to all participants in the labor market. Specifically:

- Employers need information on wage and salary data, workforce demographics, skill profiles of available workers, and the training available through the full range of learning providers.
- Residents need access to accurate, real-time career and labor market information including job availability, skill demands, pay and benefit information, information on available education and training programs, and financial aid information.
- Policymakers need information on employment and occupational trends in their region, the characteristics of the regional labor market, as well as detailed information on key economic clusters.

Currently there is considerable labor market information provided by the Commonwealth including secondary data on the economy and the labor force, information on training programs, information on occupations and careers, and projections about future occupational needs. The [Massachusetts Career Information System](#) (CIS) is an online tool to help you explore occupations and find the right education or training program once you have made your career decision. As part of the state's Website, [MassachusettsJobQuest](#) provides data on job openings, both locally and nationwide. This site also provides a schedule of workshops, job fairs, and other events sponsored by Massachusetts One-Stop Career Centers. The site also allows users to

search for [training programs](#) and find [child care](#) information at the Massachusetts Office of Child Care Services.

While this site is somewhat useful, it remains tied to the public funding streams. For example, the only training courses available through the Massachusetts Job Quest system are those currently approved for ITA or Section 30 enrollment. Thus, courses that require training of over one year in duration are not listed.

A review of the Websites of the WIBs in the region found these sites to be primarily oriented around describing services and directions to sites. Some of the sites also have research reports that can be downloaded and links to other relevant sites.

Models

Elsewhere in the country, both states and regions have taken steps to create “one-stop” Websites that provide both jobseekers and employers with a wide range of relevant information to allow them to make more informed workforce-related decisions. In effect, these sites help to align the needs of employers with the interest of residents. Specific models include:

- **Minnesota:** The Internet System for Education and Employment Knowledge (ISEEK) (www.iseek.org), is a web-based gateway to Minnesota career, employment, education, and business development information and services. ISEEK provides information in five areas: career planning, education and training, class listings, employment, and business information. ISEEK Solutions, which operates the site, is a collaboration of government agencies, nonprofits, and private industry. The Minnesota Career Information System provides educational and occupation information. It is also working with partners to create a one-stop Website where users can search for and access information to grow their businesses through locating and hiring workers. The site also provides information on support services, counseling, housing, and transportation.
- **Milwaukee:** At the request of the U.S. Department of Labor, the Employment and Training Institute prepared a manual on “Surveying Job Vacancies in Local Labor Markets.” The objective of the survey is to use job opening data to assess spatial and skills mismatches within sub-areas of the labor market and to target training and transportation strategies for workers. Similar surveys are underway in Buffalo, San Francisco, Denver, Minneapolis, Daytona Beach, Portland (Maine), La Crosse (Wisconsin), and a seven-county region of New York State.
- **San Diego:** The San Diego Workforce Partnership has undertaken extensive surveys of labor market issues for 11 key economic clusters in its region. The partnership is a 501(c)(3) organization that involves the Workforce Investment Board, the United Way, and elected officials in the region. Its San Diego at Work Website (jobs.sandiegomatwork.com) is a focal point for all labor market information in the region. The Partnership also puts out a monthly “Barometer” that provides up-to-date labor market information relevant to employers and residents.
- **Fort Worth:** The Fort Worth Chamber, the county community college, and Work Advantage (the Tarrant County Workforce Investment Board) have conducted

extensive surveys of occupational needs and associated skill sets. They jointly maintain a Website, “Work Advantage,” (www.usworks.com/tarrant/) that provides extensive labor market information for employers, jobseekers, and human resource professionals.

- **Pittsburgh.** Trainingsaver (www.trainingsaver.com) is a private web-based broker of training services serving the Pittsburgh area. It maintains an extensive database of training providers available to employers in the area. Employers seeking customized services can submit an RFP with a detailed description of training needs. Trainingsaver identifies training providers whose services are well matched to the needs of the employer and submits the RFP to these providers, who are then free to respond to the RFP. It also provides independent evaluations of training quality. In addition, it is currently in the process of developing a training catalogue where employers can identify programs that meet their specifications and contact them directly.

Components

SEWIB could develop a regional workforce web portal—a single information source on regional labor force demand and workforce development resources that is useful to key user groups, including economic development professionals, education administrators, workforce development planners, career counselors, and individual jobseekers and employers. The Website could have the following components:

1. **A career information tool.** The career information tool would identify occupations in demand and provide detailed employment information for a wide range of occupations.
2. **An education and training resource tool.** This tool would include comprehensive information on training programs offered by nonprofit organizations, private proprietary schools, and colleges and universities. It could be used by both jobseekers seeking to obtain new career skills and employers seeking to upgrade the skills of new or existing workers. It could be an interactive tool, matching users to appropriate resources, based on a user profile of relevant information completed by the user. This could potentially be supplemented by a staffed service that “brokers” training services to employers based on a more in-depth analysis of employer needs.
3. **A job search tool.** This tool would involve access to a wide range of job boards and listings. This could involve a web application designed to simplify the process of hunting for a job or internship by employing state-of-the-art indexing and search engine technologies to deliver an online searchable catalog of southeastern Massachusetts-based job opportunities announced on the Internet.
4. **A labor market information tool.** This tool would provide easily accessible, informative, and current labor market information, including data built on vacancy surveys.

5. **An employee search tool.** This tool would allow employers to identify jobseekers who have credentials that are needed for job openings as well as the full range of training resources for their workers.
6. **Link.** The site could provide linkages to all other relevant regional and state Websites.

Partners

SEWIB would need three types of partners in designing and managing this initiative:

1. **Advisors:** representatives of key stakeholder groups, including employers, workers, and resource providers. They should be consulted on an ongoing basis about the content, presentation, and operation of the Website and related services.
2. **Content providers:** labor market data, career information, labor market exchanges (jobseekers and job postings), education and training program information, and employment support resource information .
3. **Marketers:** organizations that serve or interact with targeted audiences on an ongoing basis, including employer organizations and community-based organizations, and have an interest in encouraging use of the Website tools.
4. **Funders:** organizations with a policy or financial interest in the operation of the Website that can be approached to provide financial support

A number of organizations could serve in one or more of the above partner roles:

- Newspapers
- Staffing agencies
- Community Colleges
- Other institutions of higher education
- Public school guidance departments
- Private proprietary schools
- State DET
- Human resource departments/associations
- Chambers of commerce
- Regional planning and economic development organizations
- One-stop centers

Resource and Management Needs

To be useful, this tool must be “demand-driven”—that is, it must provide the information that is desired by targeted user groups. It must also be accurate, current, comprehensive, and user-friendly. This requires extensive market research, good technical and visual design, ongoing maintenance and updating, and continuous refinement and improvement. To achieve this high standard will involve a long-term

resource and management commitment. Once the costs of generating content and operating the site are determined, SEWIB will have to solicit the necessary funding. In terms of management, SEWIB could elect to manage the site itself through one of its member WIBs or contract the management to an appropriately qualified organization, possibly one of the region's higher education institutions.

Implementation Suggestions

The WIBs could convene a working group made up of key stakeholders including individuals from secondary education, post-secondary education, employer groups, economic development organizations, and other workforce groups. The group would focus on the following issues:

1. Identify the information gaps.
2. Identify the audience.
3. Identify potential partners and establish an engagement process.
4. Identify potential vendors (e.g., for career guidance software, see list below).
5. Identify costs of designing and managing the site.
6. Pursue funding options: in addition to public, philanthropic, business contributions, the group should explore user fees, linkage relationships, and advertising to support the operations.
7. Develop a strategic plan for moving forward.

Developers of Career Guidance Software

- Bridges.com
- [Career Development Systems](#)
- [Chronicle Guidance Publications](#)
- [COIN Educational Products](#)
- [DISCOVER](#), American College Testing (ACT)
- [intoCareers](#)
- [JIST Publishing](#)
- [Peterson's](#)
- [Riverside Publishing](#)
- [SIGI PLUS](#), Educational Testing Service
- [Sigma Assessment Systems](#)
- [Wintergreen Orchard House](#)

Regional Learning and Networking

Our earlier interviews indicated a strong interest in opportunities for greater interchange among workforce development practitioners and between different stakeholders in the workforce development system. This includes information sharing about what is going on in the region, opportunities for networking and relationship-building, more learning about innovations in the workforce development field, and more brainstorming and problem-solving around common issues. Additional contacts among these various actors could yield other important benefits. They would likely identify and build ground-level support for additional region-wide initiatives, leading to the implementation of more of the program options identified through this project as well as others that emerge in the future. And, they would reinforce and strengthen the identity of southeastern Massachusetts as a coherent region.

Components

SEWIB could take the lead in organizing an initiative to provide learning and networking opportunities for workforce development organizations and other stakeholders in the workforce development system. While the particular topics and delivery methods for these activities should emerge from consultations with target audiences, we think the initiative should have three basic components:

1. practitioner exchanges among workforce development organizations and professionals;
2. interactions between workforce development with related policy areas, including economic development, K-12 education, transportation, and human services;
3. interactions between workforce development with its customers—businesses and workers—both directly and through intermediary organizations (chambers, unions, CBOs, etc.).

Practitioner Exchanges

Practitioner exchanges across the five WIAs would have a larger critical mass of participants, promote exchanges from a wider base of knowledge and experience, and support cross-WIA collaboration. These exchanges could involve a variety of venues and topics: These include:

- **Large region-wide conferences.** These could cover topics such as regional economic and labor market trends, changing federal and state policies and their implications for the region, improving coordination among different components of the system, developing common standards and performance measures, and programmatic innovation and best practices in areas.
- **Small meetings of professional peer groups.** Meetings of professionals in areas such as job development, case management, ABE training, etc. could be organized. These could involve professional development programs or simple exchanges of information about professional standards and practices and other topics of common concern. Or they might involve meetings of professionals in complementary fields to discuss how to better coordinate and integrate activities. They could rotate around the

region and might also involve site visits to see how different organizations organize and manage their activities. Use of videoconferencing or webconferencing could also be explored.

- ***Web bulletin boards or message boards.*** The regional Website discussed above could include a section where professionals could share information on resources, professional practices, etc.
- ***Information dissemination.*** An e-newsletter with information relevant to the field and the region could be distributed. Reports, studies, and other relevant materials could also be posted on the regional Website.

Linking Workforce Development with Related Policy Areas

There is a particular interest in promoting more linkages between workforce development and economic development activities. Practitioners in these two fields need to better understand each other's roles and develop ways to better coordinate their activities. Means to do this could include:

- ***periodic (perhaps annual) regional meetings*** where economic development and workforce development organizations come together to educate one another about their respective roles and activities and discuss opportunities for collaboration;
- ***cross-training programs*** for workforce development and economic development professionals;
- ***development of collaborative mechanisms*** — a working group of workforce development and economic development professionals could be established to explore specific mechanisms for integrating their work more effectively and designing pilot programs.

Similar efforts could be considered with respect to the human services and transportation fields.

Customer Outreach

There is also an opportunity for the WIBs to work on a regional basis to provide forums for outreach and information sharing with their primary customers—business and workers—to keep abreast of client needs and adjust their services accordingly, to build stronger relationships with business intermediaries (e.g., chambers of commerce), and to encourage businesses to strengthen their own workforce practices and interact more effectively with the workforce development system. Means to do this could include:

- ***Cluster roundtables.*** Some WIBs are already sponsoring meetings with industry clusters. Where appropriate, these could be expanded to a regional basis. Periodic meetings (perhaps quarterly) could be held with representatives of key regional clusters to identify workforce issues and discuss ways to address these issues through joint industry action and partnerships between industry and workforce development. These would be informal meetings rather than formal cluster initiatives, but might be formalized if there was sufficient interest. Clusters to be targeted on a regional basis, other than healthcare, include education, retail and hospitality, wholesaling, and advanced manufacturing.

- ***Information on the WIBs and other workforce development resources.*** While each WIB has its own way of getting out information about workforce development resources in its region, the WIBs could consider collaborating on developing common informational materials and presentations for regional chambers, human service agencies, and other relevant audiences.
- ***Conferences on employers and workforce development.*** The WIBs could also sponsor periodic conferences of broad interest to employers. These could address such issues as regional economic and demographic trends and their impact on labor supply, exemplary human resource practices that increase workplace productivity, and opportunities and resources for employer partnerships with regional workforce development organizations. The training academies conducted by the Metro South Chamber of Commerce under the Workforce 2020 program sponsored by the U.S. Chamber of Commerce could be one model for this initiative. This involved a number of workshops on labor market trends, how workforce issues affect the company's bottom line, approaches to addressing training needs to increase worker productivity, and available workforce development resources. Conferences could be supplemented by the distribution of related information materials to employers.
- ***Business-educators forums.*** There is a strong interest in promoting more exchanges between the business community and educational institutions to improve the effectiveness of the K-12 system and to promote better integration of K-12 with higher education. Some efforts are already taking place in this regard, such as the Southcoast Education Partnership. The WIBs could consider promoting a broader dialogue and stronger partnerships on a regional level.

Partners

Undertaking this initiative will require partners playing a variety of roles, including co-sponsors, funders, presenters, and marketers. The particular set of partners will shift depending on the nature of the topics, target audience, and delivery method. Among the organizations that will be important to one or more of the above components are:

- regional chambers;
- regional and local economic development organizations;
- state trade associations;
- organized labor;
- higher education institutions;
- nonprofit and proprietary training providers;
- community action agencies and other human services agencies;
- regional competitiveness councils; and
- regional media.

Resource and Management Needs

Resource and management needs would vary depending on the scope and scale of the initiative. Management needs include establishing planning committees, planning agendas, lining up speakers and panels, handling meeting logistics, soliciting sponsors, and fundraising. If the initiative is relatively small scale with three or four discrete events per year, this can likely be handled by existing staff of the individual WIBs. If there is an interest in a larger-scale ongoing initiative, it will likely require the provision of a dedicated staff person.

A number of funding sources should be considered. These include sponsorships for conferences and workshops, participant fees, and in-kind contributions of space and equipment.

Implementation Suggestions

SEWIB could take the lead in soliciting input on topics and format from various constituency groups and in planning, sponsoring, facilitating, and/or providing logistics for the various activities. Or, it could play a less active role, for instance, developing ideas and seeking to interest other entities in taking the lead role. The potential implementation steps include:

1. Discuss ideas informally with potential partners to determine their level of interest.
2. Conduct market analysis, e.g., distribute a survey to potential target groups to determine topics of interest, preferred venues, price sensitivity (i.e., would they pay to attend?), etc.
3. Develop a plan and a set of initial events with a budget.
4. Hire/designate a staffer to coordinate activities.
5. Find funders and co-sponsors.
6. Launch initial events.

Discussion Questions

In laying out these initiatives, we have suggested certain approaches to implementation. At this point, these are suggestions rather than hard-and-fast recommendations. We think it is important for you to consider the organizational implications of each initiative and what form of implementation best fits with how you see SEWIB's role evolving over time. At the Wednesday meeting, we would like to further discuss with you how you see implementation proceeding. The following questions will be used to guide our discussion.

1. Is SEWIB prepared to play a significant role in this initiative? What role would be appropriate for SEWIB?
2. Should SEWIB start this initiative "from scratch" or is there an existing effort already underway that can be built upon?

3. Is there a group of organizations in the region that has the capacity and perhaps the interest to take on this initiative? If not, is there an organization or group of organizations that could, under the right circumstances, expand their focus and take this initiative on?
4. Is there a solid base of public and private sector leadership that could be organized to lead this initiative?
5. Are there sufficient resources available to develop this initiative, or would funds have to be raised?
6. On a practical level, what steps need to be taken in the next 2-4 months in order to move forward on this initiative?
 - Develop a briefing paper that would clearly articulate the goals and the measurable outcomes from the initiative?
 - Schedule one-on-one interviews/meetings with key public and private sector leaders to test out the idea of the initiative?
 - Conduct more labor market research and/or data?
 - Collect more information on what existing organizations and institutions are doing in this issue area?
 - Collect more information on outcomes and benefits from “best practices” efforts around New England and the country?
 - Raise sufficient funds for the initiative?
 - Hold focus group meetings with key groups or organizations?
 - Invite a key leader or organizer of an organization that has demonstrated results in this issue area to meet with SEWIB?
 - Organize a Summit to educate regional players and leaders on this issue?