



Workforce Boards: The Mandate to Lead

Orientation / Training

Spring 2016



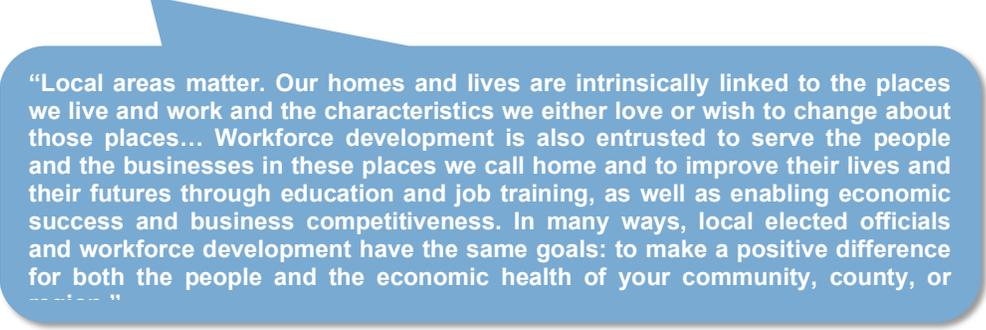
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PURPOSE

This “guide booklet” is meant as that, a guide. It is not intended to answer every question or serve as the definitive guide. In some respects, NAWB is guided by the learning philosophy that we perfect our understanding of a problem and its solutions, when we need to. We hope to present you an overview that grounds you in the broad vision of what we understand the intent of WIOA is and ask you to stretch to achieve what you can do.

WIOA, we believe, puts the boards in touch with the concepts of strategic planning, demand driven and workforce as a system, more so than previous Federal legislation. We hope that board members are guided by an understanding that the workforce development system is complex, requires serious attention, and at its core is focused on something we know and care about, our communities. In the introduction to our guide for local elected officials, we make an observation about workforce development that we think equally applies to local workforce board members:



“Local areas matter. Our homes and lives are intrinsically linked to the places we live and work and the characteristics we either love or wish to change about those places... Workforce development is also entrusted to serve the people and the businesses in these places we call home and to improve their lives and their futures through education and job training, as well as enabling economic success and business competitiveness. In many ways, local elected officials and workforce development have the same goals: to make a positive difference for both the people and the economic health of your community, county, or ...”

Let us know how we can help. If there is a section you don't understand, want more information about or presented it and there were questions that you couldn't answer, contact us at info@nawb.org.

NAWB wishes acknowledges the valuable help provided by the Public Consulting group, led by Reg Javier and Molly McMullan, and the external reviewers among our members for their suggestions/edits.

Finally, this publication and the accompanying slides are copyrighted property of the National Association of Workforce Boards, who is also solely responsible for the contents.

SLIDES



TALKING POINTS

- Title Slide

- Welcome & introductions



Agenda

Welcome & Introductions

About NAWB

A Brief History

WIOA Overview

- Part I – The Basics
- Part II – The Role of the Board
- Part III – The Mechanics of Leading
- Part IV – Systems & Collaboration
- Part V – Public Policy and the Board

What's Next?



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TALKING POINTS

About NAWB

What is NAWB?

10,000 business members
making workforce
investments work



- Represents ~550 Workforce Development Boards and their 10,000+ business members
- Is the only association that advocates for WDBs
- Works closely with policy makers to inform national strategy as it relates to WDBs and our partners

NAWB's mission is to support its members through a comprehensive program of

- advocacy,
- training and technical assistance,
- communication, and
- the promotion of strategic partnerships for the advancement of our nation's workforce.

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A Brief History

TALKING POINTS

- NAWB is proud of its heritage in advocating for/ being a representative for the members and staff of the nation's business-led workforce boards.
- Founded by private sector board members and incorporated in 1978, NAWB strives to provide valuable support to the work if its members.
- The number of local boards is a changing number. As we implement WIOA, some states add Boards (Oregon) & some have reduced the numbers (Michigan).

Morrill to WIOA: Federal Engagement in Skilling (1862 – 2014)



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A Long Federal History



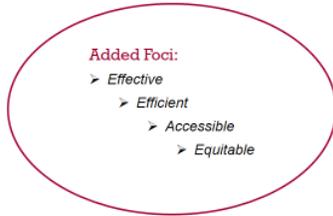
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TALKING POINTS

- The Morrill Act, establishing the nation's land grant university system, was passed in response to the need to train workers in "modern" skills needed in manufacturing and agriculture.
- It met stiff resistance in Congress in its first introduction, but like most education and workforce initiatives, gained support over time.
- So from the signing of the bill in 1862, to President Obama's signing of the Workforce Innovation and opportunity Act of 2014, the Federal government continues to play a vital role in skilling the American labor force. Its focus may change, but the purpose remains rather the same – meeting the needs of business to maximize economic gain for people, business and communities.
- This chart shows the major pieces of Federal legislation that has marked the Federal investment. In the modern era, starting with President Johnson's call in the early 60's for a public/private partnership to maximize the opportunity for all Americans to have the skills and access to work, the role of business has evolved.
- From that loose partnership to advisory roles to the WIOA clear focus on business as the prime driver in a demand-led system, workforce boards have likewise become more critical.

Today's Paradigm

Social Policy Heritage → Economic Policy Considerations



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Questions?

TALKING POINTS

- Dennis Bone, who chairs the NJ Workforce Board, made a most astute observation when he said, “The shift that I see happening is that WIOA and other policy directions (e.g. sector strategies & stacked credentials) take us (the workforce system) close and closer to putting the needs of the job creators (business) at the center of the value proposition. In my opinion, we used to focus more on getting inside the head of the laid-off worker to meet their needs and making that the focus on the workforce system. When we get inside the head of the job creators and really understand what they need in terms of worker competencies...and then deliver on creating those competencies...then I believe we shift the lens from social policy to economic policy...the needs of business are not static – they continue to evolve...so the system needs to be agile.” We agree that a major shift has taken place in WIOA. It’s not that the job seeker isn’t important, they are. It’s their skills/competencies need to be assessed against the changes of a dynamic market. A market that sees millions of hires and separations each year. The Boards’ eyes need to be always trained and working to understand their changing labor market, and to invest/coax/cajole the workforce system to respond. In this process, we believe four (4) words and their attendant work are critical for the boards’ view of their regional workforce development system: effective, efficient, accessible



WIOA Overview

Purpose

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

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TALKING POINTS

- I'm guessing people now want more specifics, so here we go.

- What follows from the title of the bill, are 800+ pages laying out the bill. But it might help to start at the beginning. Here is what the folks who wrote the bill say it's about. The purpose very clearly suggests; a) workforce development is a "system" not a collection of programs, and that a "partnership" of with education and economic development is what is expected.

Purpose

WIOA provides workforce investment activities through State and local workforce development systems, that...

- 1 Increase the earnings of participants
- 2 Increase attainment of recognized post-secondary credentials by participants
- 3 Improve the quality of the workforce, reduce welfare dependency, increase business engagement, and enhance the productivity and competitiveness of the nation

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Part I – The Basics

TALKING POINTS

- Next, the authors lay out what they see as the ultimate end-game for WIOA. It doesn't take much for us to understand on "what" we will demonstrate impact. The Workforce Board, as the entity charged with aligning the workforce development system, now should have an idea on what issues to examine, dialogue on, and pronounce to what extent these are achieved. Not just with the relatively small amount of direct investable dollars they control in WIOA, but the larger investments made for workforce development.
- Let's look more closely at what happens after the law is passed & signed.

General Law & Regulations to Remember

Federal Law is Step 1 in the chain

- Once a law is passed, one of the Federal Departments is charged with implementation
- WIOA is complex
 - Involves programs funded through the Department of Labor AND the Department of Education
 - Implications for the Department of Health & Human Services (TANF) and the US Department of Agriculture (SNAP) and work activities in other Departments

Why not place everything into one law?

The Federal budget is divided among 12 separate funding bills or "functions" – not all activity that is about "work" and "skills" is in our functional area.

WIOA is funded primarily through the House and Senate Subcommittees on Labor, Health & Human Services, Education, and related agencies.

TALKING POINTS

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General Law & Regulations to Remember

Federal Regulations

- US Department of Labor
- US Department of Education
- Joint Labor & Education Regulation

Regulation Guidance:

- Understanding the Law & Regulations through Training and Employment Guidance Letters (TEGL)

State Regulations:

- The Governor
- The Legislature
- Various Departments in State government

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Two Approaches....



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The Money...

From Congress to Department & then...

- Secretary Retains funds for:
 - National emergency grants
 - Demonstrations & pilots
 - Research & evaluation

From Department to State & then...

- Governor retains 15% for their purpose and "state-wide" activities"
- 85% by formula to local designated entities (grant recipient & boards)

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TALKING POINTS

- Not unlike many industries, workforce development is heavily regulated and requires a lot of reporting. Boards can let the regulations drown them and adopt a "we can't!" attitude or, can accept that until the regulations can be changed, they can take an approach that looks at what needs done – what's the goal/success - and then develop a "training regimen", a plan to reach the goal – it takes work, persistence AND INNOVATIVE ideas and actions. Board members solve problems in their own business and organization – WIOA is permission to solve workforce issues in your region. Then to join with others to seek changes in regulation/law that impede those solutions. If only Congress would send the check direct, but NO, there are specific "set-asides" in WIOA for each layer through which the money passes.
- The 15% set-aside for the Governor is a long-standing back/forth that revolves around key concepts in the life-cycle of any Federal grant. Not all the money can be spent at once. WIOA's allocations have a three-year life which has certain benchmarks for timeliness of receipt from the state to obligation (contracting if you will) to expenditure. Each stage has lag-time and often

The Outcomes...

Adult & Dislocated Workers

- % of participants in unsubsidized employment during second quarter after exit
- % of program participants in unsubsidized employment during the fourth quarter after exit
- Median earnings of participants in unsubsidized employment during second quarter after exit
- % of participants who obtain a recognized postsecondary credential, secondary school diploma or equivalent during participation or within 1 year after program exit
- % of participants who during a program year are in education that leads to a recognized postsecondary credential or employment and who are achieving measurable gains towards those goals
- Indicators of effectiveness in serving employers

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The Outcomes...

Youth

- % of program participants who are in education or training activities, or in unsubsidized employment during second quarter after exit
- % of participants who are in education or training activities or in unsubsidized employment during fourth quarter after exit
- Median earnings of participants in unsubsidized employment during second quarter after exit
- % of participants who obtain a recognized postsecondary credential, secondary school diploma or equivalent during participation or within 1 year after program exit
- % of participants who during a program year are in education that leads to a recognized postsecondary credential or employment and who are achieving

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TALKING POINTS

- WIOA, like WIA, relies on performance outcomes, both as a way to report outcomes to Congress, but also, to determine local area outcomes that will be considered in the designation process. It should be pointed out that;
 - ALL titles under WIOA are subject to performance outcomes, so this is new to adult literacy and vocational rehabilitation
 - Performance measures aren't new to workforce. In 1998 with passage of the Job Training Partnership Act, outcome measures were introduced to the Federal investment in the new "second chance" program as it was characterized.

The Outcomes...

..and

State-Determined Indicators

- Governors may identify other measures or indicators to measure the effectiveness of local workforce systems in their states

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Questions?

TALKING POINTS

Part II – The Role of the Board

TALKING POINTS

- So, let's look at the local aspects of the law.
- In the negotiations on the final language for WIOA, a great deal of attention was paid to where the work actually happens, the local level and two prime players; local elected officials and the "board". Local elected officials are critical partners in workforce development system. They not only often fund the economic development investments locally/regionally, but they are often asked to respond to the challenge from business that it's too hard to find qualified workers.
 - Their first decision is to determine whether if they have been a local area, if they want to continue. Subsequent designation decisions will also need the support of local elected officials since there is more latitude for the Governor to design variables to subsequent designation decisions beyond the two specifically enumerated in the law: meeting performance and maintain operational integrity.
 - The second very critical decision is who sits on the local board. In this area it's important to note that the "mandates" on who should sit on the local & state boards have been changed from WIA to WIOA. NAWB fought hard to limit the Federal mandates, believing that you – locally – should decide how big/how small you wanted

Role of Elected Officials

Local Area Designation

- First 2 years
 - Do you want to be a local area?
 - Have you met performance & maintained fiscal integrity?

Board Member Appointment

- Critical to the success of the Board and to the success of the workforce development "system"

Fiscal Agent

- Names the fiscal agent

In appointing the board, the Chief Local Elected Official:	
Shall Include	<ul style="list-style-type: none"> • Business (51%) • Workforce – Labor (20%) • Adult Education and Literacy • Higher Education • Government & Economic Development • Wagner-Peyser • Vocational Rehabilitation
May Include	<ul style="list-style-type: none"> • Community Based Organizations • Youth Organizations • Transportation • Housing Specialists • Philanthropic Organizations

Local Board Structure

Similar (smaller?) to the Workforce Investment Act

- Business-led at the State and Local Levels
- Legal structure possibilities:
 - Attached to local gov't?
 - Regional entity?
 - Separate non-profit?
- Staff?
 - Government employed staff?
 - Board employed?
 - Other entity staffing?

Changes prompt WDBs to increasingly engage in collaboration, convening, and partnership.

Changes

- State Composition Changes
- Local WIBs may Reduce Membership
- 3-Step Designation Process

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Board Budget & Staffing

Budget

- Board has the ability to develop its budget, and
- The Program/services budget
- Reminder: Budgets are statements that convey what we value, not just a set of numbers – what does your budget say about your priorities?

Staffing

- Government employed staff?
- Board employed?
- Other entity staffing?
- In any case, how do you give staff the resources to impact what you care about and what you want to impact? Have you identified metrics of success?

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TALKING POINTS

- Boards now face decisions about how they are structured and how they function. There are numerous ways Boards can be configured – Henry Mintzberg, an expert in strategic planning, reminds us that structure follows strategy – what is the work and then what is the structure? If the Board wants to supplement the formula funds from WIOA, it may want to consider becoming a non-profit in order to receive donations from philanthropic entities, government grants and private funding for initiatives it wants to undertake. It should be noted that the labor market changes and as it does, how we evolve to solve these challenges is an important conversation.
- Local boards are faced with not only the mandates of oversight for funds they invest in their local one-stop system and in the training they underwrite, but now are asked to be leaders in convening local systems. Critical decisions about what tools the board needs to do this work are one of the first orders-of-business. WIOA may ask for activities and skills staff have not been asked to perform before. How will the board find and retain the talent they need to satisfy their legal mandates and the “intent” of WIOA?

Our Area of Focus



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Board Activities



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TALKING POINTS

- This is a Venn diagram of where the work of the Board sits. The workforce development system then is a “system” within the larger systems of business/economic development, the pK-12+ education system, and the community factors of housing, transportation, child care, etc. A community landing a large number of jobs is step 1. The “fulfillment” of that opportunity takes coordination in having/making the talent and delivering the talent. Complex activities all around. Daniel Meadows once wrote a piece about collaboration among systems in which she suggested that truly successful collaborations had at their core and intermediary – be that a person or an organization – that learned the rhythm of other systems and could “dance” with its partners. Building trust by understanding what drives other systems, what are the measures of success for them, how do you collectively see the future for your region and how can you each support one another and share in the success, is key ingredient in the board’s work. Having “connectors” on the board, people who travel in more than one circle in the diagram is really helpful we think. So, Board members who sit on local chambers of commerce of economic development or school boards or boards of post-secondary institutions, we think helps enrich the board’s understanding and dialogue.
- This slides lists the specific activities the law charges local workforce boards to engage in. Does a board have to lead every one of these? Might not be possible, but collaborating can achieve many of them with the Board’s help.

Strengthening Business Engagement



- Customer Relationship Management (CRM) solution implementation
 - Simplify tracking business engagement across organization
- County Business Services Taskforce
 - Current members
 - Quarterly meetings
 - Unified collateral material
 - Co-host business events throughout the county
- Engaging businesses in workforce projects

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Business Engagement under WIOA

Changes from WIA to WIOA

- Demand-driven
- Shift in focus to building a pipeline of skilled workers to help businesses remain competitive
- Increased collaboration with businesses, economic development, chambers, and other business associations
- Larger focus on work-and-learn instead of classroom learning
- Explicit charges to engage in sector strategies and with education in career pathways

"...provide America's employers with the skilled workers the employers need to succeed in a global economy..."

"...To promote improvement in the structure of and delivery of services through the United States workforce development system to better address the employment and skill needs of workers, jobseekers, and employers..."

"...To increase the prosperity..."

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TALKING POINTS

- One characteristic that is very evident in WIOA is that it continually focuses on the engagement of the private sector, the job creator, to make the system “demand driven”. In short, don’t train and pray people get placed – do the pre-work to determine skill needs. WIOA also places high value on work-based strategies. This again makes the need for business engagement an essential ingredient. Boards are charged with seeing this business engagement happens.

- This is intended to spark board members asking how we do these now and gives staff a chance to talk about the depth/variety of business engagement now in play.

Services

- Customized training
 - Specific employer needs AND employer commitment to hire
- On-the-Job training
 - Employer provided training that conveys the knowledge or skills essential to the full and adequate performance of the job
- Incumbent worker training (20%)
 - Participants, employer competitiveness, worker wages, and benefits
- Lay-off aversion
- Work experience (10% - youth & adult)
- Sector strategies & convening
- Entrepreneurship



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Services: The One-Stop

- WIOA mandates one physical site/local area that offers comprehensive services
- Local Boards must designate the one-stop operator and service providers
- Local one-stops are funded through a formula developed/agreed to locally, or a formula designed by the State
- ALL partners named in WIOA need to have services available through the one-stop
- Questions:
 - What do we currently have in place?
 - What have been our impact? Measures of success?
 - Outside the law & regulations, who makes a good partner in our community?
 - How can we incorporate consumer design in our service delivery?
 - What's the Board's measures for success?



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TALKING POINTS

- So what are some of the work-based strategies? How will the Board go about deciding where to committee resources among the competing ways it can be done? WIOA allows 20% of the funds to be spent on incumbent worker training. What will be the criteria for deciding where these investment will be made, if they will be made?
- One set of decisions the board will be asked to make and to monitor regards the one-stop career center. In WIA local boards could operate their own one-stop and could provide services, or could recognize a consortium of providers, usually some combination of locally-based community organizations and the state-level entities for Wagner-Peyser, adult literacy and TANF, or they could competitively bid the operation and services. In WIOA, the element of competition for some of this work is being introduced. Section 121 (d)(2)(A) of WIOA only allows the selection of a one-stop operator through a competitive process, where the role of the operator at a minimum is to coordinate one-stop partners and service providers. The interpretation of this provision is under review and the competitive process itself is expected to be defined when the Final Regulations are published sometime spring 2016. But what is clear is that role of the Board in the one-stop selection process and its performance is an "activist" role. In addition to the selection of the operator and designation of service providers, local boards are the sole determinant of adding "partners" beyond those identified in the law as mandated. The mandated partners are listed in Section 121(b)(1)(B) of WIOA and include; programs listed in title I of WIOA for adults, dislocated workers, youth, Job Corps, YouthBuild, Native American, Migrant Workers, employment services authorized under Wagner-Peyser, Adult education and literacy, Vocational Rehabilitation, Senior Community Service Employment programs, post-secondary career and tech programs funded by Carl D. Perkins Act, Trade Adjustment Assistance activities, Jobs for veterans state grants, employment and training programs funded by Community Service Block Grant, Employment & training activities carried out under Housing and Urban Development funding, the Second Chance Act funded activities, and the Temporary Assistance for Needy Families unless exempted by the Governor.
 - A long list indeed, but all meant to allow the board to satisfy the intent that the system as a whole is cohesive and accessible to individuals and businesses. The board needs to consider innovative ways that ensure service delivery is delivered in a variety of ways to meet consumer needs.
 - The one-stop competition is proposed to be held every four (4) years at a minimum to both ensure there is sufficient performance history on which they board can base decisions and to allow the operator and service providers to develop a robust strategy and execution of their plans.

Committees?

- Maybe Committee(s) to better understand the more complex parts?
- The Senate draft of WIOA "mandated" committees, but the final version only suggested "standing" committees...
 - Operational & One-stop
 - Youth issues
 - Access & equity in services (focus on persons with disabilities)
- NAWB would suggest boards consider:
 - Resources committee
 - Business engagement committee



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Questions?

TALKING POINTS

- WIOA is complex with its rules on procurement and new performance standards. NAWB suggests that the Board consider committees whose role it would be to get "into the weeds" on the more regulated/complex parts of WIOA.
 - A resources committee to look at not only WIOA funds, but other necessary for the regional workforce development system to be effective,
 - Business engagement committee to work on sector issues, career pathway and work-based learning, all of which requires close connection to the regions' businesses,
 - A standing committee is defined in the regulations as one which is "chaired" by a local board member, but must include others who have subject matter expertise. (such as orgs with experience in placing persons with disabilities in employment, education experts who can help navigate agreements to honor prior learning and companies that have established apprenticeship programs or strong employee education programs etc.)
- Questions? There should be...

Part III – More About the Criticality of Business Engagement

Learning Providers

- Key to WIOA is learning that is focused on the “demands” of the labor market
- Training providers to be eligible for consideration must provide information that addresses alignment of the training services with in-demand industry sectors and occupations (at a minimum)
- Customer choice is still a guiding principle
- On-the-Job training, customized training, incumbent workers training, and transitional employment are exempt from the state list of providers – these are the purview of the local board

TALKING POINTS

- Business engagement: This can't be stressed enough, WIOA holds the local board accountable for business engagement. This is reflected in the essence of “demand driven” that is throughout WIOA. The boards needs a very close alliance with regional businesses for sector work, for establishing skilling priorities, work-based learning policies, and the development of career pathways – which is the responsibility of the board to work with education to achieve. In this section of the orientation we deal with the questions that face the board regarding work based learning options.

Internships

Items for Discussion and Decisions

- Is every business a potential site?
- Is there real work that leads to real learning?
- Who will we staff the effort?
- Is this part of our talent strategy? How?
- Can we provide both an orientation for the intern, AND, orientation for the employer?
- How will we do evaluation?

Work Experience

Items for Discussion and Decisions

- Is every business a potential site?
- Is there real work that leads to real learning?
- Who will we staff the effort?
- Is this part of our talent strategy? How?
- Can we provide both an orientation for the intern, AND, orientation for the employer?
- How will we do evaluation?

TALKING POINTS

- Over next few slides, highlight the facts that; the eligible training provider list is the responsibility of the state, with input from the local areas, customer choice is still a consideration and that implies that there is sufficient information about the outcomes from various learning providers and other skilling activities, and that work-based learning is exempt from the state list, but clearly needs the local board to establish policies and criteria. . This notion of accountability by learning providers might raise some issues with learning providers, but NAWB believes that the local areas designation hinges in large measure on performance and a critical factor in customer choice in WIOA, as it is in our personal lives, needs information on which to base an informed choice. ALSO, there are important policy implications in each form of work based learning that the board needs to define.

On-the-Job Training (OJT)

Items for Discussion and Decisions

- Is every business a potential site?
- Is there real work that leads to real learning?
- What competencies will be achieved?
- Who will we staff the effort?
- Is this part of our talent strategy? How?
- How will we do evaluation?

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Incumbent Worker Training

Context

- Up to 20% of funds

What do we need to ask ourselves?

- Which sector(s) should be involved?
- Why?
- What criteria will lead to the selection of the company?
- What criteria will lead to success?
 - Retain employment
 - Business remains viable

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TALKING POINTS

Business Performance Measure

Context

- Great debate in the crafting of WIOA as to how to measure business satisfaction
- The "punt" in WIOA
 - Dept. of Education and Dept. of Labor to establish the measure...
- What should the measure be?

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Part IV – The Mechanics of Leading

TALKING POINTS

- The board should be reminded that among the performance outcomes that local areas will be measured is business satisfaction. This gives the board an opportunity to discuss and staff a chance to gauge, what matters to the board about business services. What factoids do they want to be able to set expectations and to convince their colleagues to use the system?
- The Mechanics of Leading: We are now at the point where the board needs to begin to put on its strategic hat. In his book, *Six Thinking Hats*, Edward de Bono lays out what he
 - **White Hat:** Your task is to focus on data. Look at the information and see what you can learn from it. Look for gaps and either try to fill them or take them into consideration. Ask for additional information and consider what happened in the past. Do patterns emerge? Can you identify trends causes?
 - **Red Hat:** You look at the decision using intuition, passion, gut reaction, and emotion. Imagine how other people will respond, and try to understand the intuitive responses of people who do not yet understand your reasoning.
 - **Black Hat:** Look at things pessimistically, cautiously and defensively. Your role is to explain why ideas or particular approaches might not work. You'll highlight the gaps in the planning. This allows you to resolve potential problems, adapt the approach, or have contingency plans for any problem that arises.
 - **Yellow Hat:** Be positive and optimistic. Focus on inherent benefits, values and opportunities that could arise. In a group setting, you will keep everyone's spirits high and lead them back to the positive when people seem stuck. Positive possibilities are good foundations for problem solving and decision making.
 - **Green Hat:** Awesomeness! The Green Hat means creativity. Be bold and dangerous, apply your imagination and try silencing rationality for a change. Don't focus on what could never happen – rather think about the 'what if' possibilities. Do whatever you need to do to enable yourself to freely express ideas.
 - **Blue Hat:** You commandeer the session and ensure that all hats are sharing ideas and engaging with their roles. Do whatever it takes to stimulate and enable the discussion. Have fun – do not be all stuffy and 'suit-

WIOA: *Not* just WIA re-packaged!

WIOA is all about being strategic



NAWE | Reg 0100 Medical Board Functions 85

TALKING POINTS

- Here is another opportunity to remind the board, particularly members who served in WIA, that this NOT simply WIA warmed-over. The Board is now responsible to oversee the workforce development “system” and this work will take a number of skills – ALL centered on a strategy, which the board will need to craft.

Board Activities



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- This is a graphic meant to illustrate what activities will look like when the board/staff step back and look at the whole. How will all this get done might be the *first* question to ask.

Leader Characteristics of the Board

Internal Investments

- Negotiates performance standards that are a stretch
- Develops/maintains a culture of continuous improvement, including conversations with the internal expertise of the staff & contractors
- Has the necessary strategic conversations (i.e. budgeting, strategy, foci on the outcome, etc.)
- Roots decisions in data analytics
- Searches for Innovation with Continuous Improvement as a core value
- Has articulated policies governing the ethics of the board's operations and a strong conflict-of-interest statement

External Investments

- Communicates market conditions
- Engages:
 - Sector discussions
 - Pathway building with education
 - Collaboration with the Governor's State-wide investments
 - Local elected officials and state & Federal policy makers
- Supports the systems that surround workforce development

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Leader Characteristics of Staff

Internal Investments

- Serves/coaches the Board
- Focus on "management" metrics
- Supports Staff
 - Development
 - Collaboration
 - Engagement

External Investments

- Builds collaborative networks
- Develops a regional "shared" plan
- Connects to the community – CBOs and support systems like housing, transportation, education, etc.

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TALKING POINTS

- These slides suggest what characterizes leadership skills and is derived from numerous studies and writings about the notion of leadership. These can later be turned into an assessment for the Board to look at itself and its work. One Note: if it will take strong collaborations and partnerships to achieve an effective/efficient workforce development system, which we believe it will, then the Board needs to be prepared to support the players in the region who help deliver results. We'll talk more about public policy & advocacy in Section VI of this orientation.

Sectors of Focus

Industry Sector Navigation

- Staff dedicated to specific industries
 - Work directly with businesses in their targeted industry
 - Work with job seekers going into their specific industry
- Analyze industry labor market information
 - Guide job seekers in career pathways
 - Assist businesses in decision making
- Build pipeline of skilled workers in growing industries

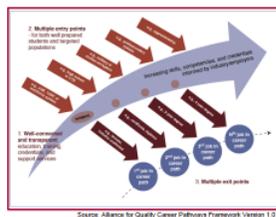


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Sectors of Focus

Industry Sector Navigation

- Identify credential gaps
 - E.g. Transitioning Troops to Technology (T²)
- Identify critical industry skills needed when no credentials are recognized
- Create training cohorts to fit the need of industry demand
 - E.g. CyberWorks
- Ask, "How does the worker benefit?"
 - More competitive skill-sets, but...
 - Portability?
 - Higher wages?
 - Recognized in the post-secondary system



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TALKING POINTS

- The board needs to start the process of thinking. Data is critical in WIOA and here the board needs to figure out how to put on de Bono's white hat – facts. It might not be too early to present the board some facts about the region; population, civilian labor force and participation rates, industry sector demographics. NAWB also has materials that can help a local board determine what the sectors that matter the most to them are. The exercise is designed around weighted factors that are paired and the board then assigns value to each pair, concluding with a ranking based on those preferences. This ranking serves as a starting point regarding what sectors the board feels strongly about in terms of their work focus.
- This introduces the world of credentials and the factors that the board needs to consider as part of their determination or work focus. Remember, it's not always obvious and it's not always a matter of numbers that can be used to determine focus. This is another point where the board needs to exam what it values and then take this understanding into the discussions with its partners in economic development and public policy. A clear vision, crafted through diligent outreach to the whole community is the bedrock of the board's actions.

Our Strategic Dialogue

- What would be the content of our strategic dialogue?
- How are the discussions framed?
- How does the discussion have an impact on the work and contribute to the economic picture?
- How would we facilitate the discussion?
- Who do we need at the table?
- How will we communicate our strategies?

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Our Strategic Dialogue

Metrics-Outcomes-Impact

- For all of the activities that are in the ACT do we have to do the all?
- What are our metrics? What do we need to collect?
- How do we tackle these activities?
- How will we determine if our strategies are effective?
- How will we explain what we are doing?

- *Do we have access to what we need?*
- *Where will we get the data/information?*
- *How will we use the metrics?*
- *How will we use the data/information to tell our story?*

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TALKING POINTS

- These next few slides remind the board of what questions are important and strategic. These are suggestions and the board needs to determine if they believe these are appropriate. These aren't unique to WIOA but should be familiar to the members as ones they use in their ordinary business world.

Crafting Our Strategic Direction

Questions to Ask

- Which activities do we tackle first?
- When do we begin?
- Who do we need at the table?
- Who's already doing things that will help inform our plan?
- How do we connect with those who are already doing?
- What best practices can we glean from?
- What best practices do we have to share that can be used as a strategy to reposition us?

• How do we prioritize?
• What's critical/what's not?

Who are the critical partners needed for each activity?

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WDB Meetings: Topics We Must Always Discuss

Key Topics

- There are core elements (questions we should consistently be asking) at every Workforce Board meeting such as:
 - What's going on in the economy?
 - What's new in the education world?

Planning Ahead

- What would our meeting agenda look like when addressing these areas?
- How do we make these discussions meaningful?
- Is there data/information we need to inform our discussion?
- What leadership characteristics and practices should we enact and display?

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TALKING POINTS

- NAWB believes that core to keeping members engaged is their meetings and the key to a "good" meeting is the agenda. We believe that careful consideration needs to be given to how the agenda is crafted. The agenda should rely heavily on getting members to discuss the labor market, policy and subsequent action and outcomes, in the context of what they value and what they believe is critical. No one likes to attend a meeting where they are "talked at" and have little knowledge or opportunity to "participate". That means the workforce jargon has to be translated into a language the board understands and can intelligently respond to. Not an easy thing to do. The work between the staff and the chair can be intense at times and no more so than the agenda. This adds another factor in how critical the selection by the board of their chair is, and how important the member selection is for local elected officials.

Strategic Development of the Meeting Agenda

SAMPLE MEETING AGENDA		
Agenda Topic	Strategic Discussion <i>(What things should we be discussing?)</i>	Data <i>(Information)</i>
	<ul style="list-style-type: none"> • Has this already been done? <ul style="list-style-type: none"> • If so, where, when, how? • Is their LWIA similar to ours (i.e., demographics, geography, funding, etc.)? • Can they be used as a model/are they reputable? • Who do we need at the table? <ul style="list-style-type: none"> • Do we have already formed partnerships or do we need to form new alliances? • Are there any implications we need to consider (i.e., political, relational, ethical, financial)? • Do we have the resources? 	<ul style="list-style-type: none"> • What data points should we be looking for? • Do we have what we need to make a decision or take action? • What else do we need?

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Activity: Thinking Through the Agenda

SAMPLE MEETING AGENDA		
Agenda Topic	Strategic Discussion <i>(What things should we be discussing?)</i>	Data <i>(Information)</i>
What's going on in the economy?		

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TALKING POINTS

- This is our attempt to present a sample meeting agenda. It's a suggestion but one built on considerations of what the board must discuss and plan like performance levels and regulatory compliance, but is also meant to intentionally engage the board in meaningful discussion.
- Most of us know how to perform operational activities and this can be a comfort zone, but boards are asked to be strategic and to think in terms of that murky world of policy. This is where the discussion of metrics on slide 55 is important.
- NAWB believes that WIOA defined performance is the "basics" of how to consider the impact of the boards activities. Performance standards are influenced by the board's decisions, but managing them is a staff function. Staff should bring the performance and the pertinent factors of "why" performance is as it is, but the board should stay to policy. It's not outside the realm of possibility that what is needed in the region and how that impacts achieving WIOA performance might not be congruent.
- The board needs to consider this and choose a course of action, accepting the responsibility in to contextualize the performance to policy makers, and to consider performance in light of the board's strategy in their negotiation with the state on performance levels.

Board Metrics

What Matters?

- Federal performance, yes, but is that all?
- Our outcomes
 - Increased revenue that increases impact
 - Living wages
 - Collaboration success
 - Less duplication in program services
- Business engagement outcomes
 - More businesses using the system
 - The "right" businesses using the system
 - Higher wage sectors?
 - More people entering the labor market



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Moving Forward: Our Map

- This is **what** we must do
- This is **how** we will do it
- This is **when** we will get it done
- This is **how** we will define and measure success



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TALKING POINTS

- This is an opportunity for the board to create their metrics; what information and in what format do they believe they need in order to have an informed discussion to make informed decisions
- These metrics can be about what's important in the community, like, how many placements do we do where the wage meets "self-sufficiency"? or how many placements do we do into industries/occupations we've articulated a career pathway for? NAWB has ways to plan that look at a broader landscape than just WIOA performance. Ask us to share that planning tool for more ideas about where metrics might come from.
- In short, the board needs to be able to answer...

Roberts or Roberta's Rules of Order

WHEN DEBATING ...

1. Listen to the other side
2. Focus on issues, not personalities
3. Avoid questioning motives
4. Be polite

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Questions?

TALKING POINTS

- If there were a placemat for meetings, this might be it. Simply a reminder of the meetings ground rules and a chance for the board to add its own rules for meeting behavior.

Part V – Systems & Collaboration

Bridging Workforce & Economic Development



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TALKING POINTS

- A key partner in achieving positive impact in a local boards region is its relationship with economic development and the board's ability to engage and work jointly with other boards in the region. NAWB doesn't believe the old adage, workforce development *IS* economic development. Both are disciplines that rely on skilled practitioners to maximize the available resources. Both views need to be presented to policy makers and investors to allow them to make informed decisions. There are times where investments in one or the other makes no sense, without consideration of the factors relevant to the other. For example, an economic development investment in an area of the region without viable transportation, or a skilling project un-connected to emerging industries in the region, in terms of the certifications it is meant to produce or the numbers of people needing skilled. Local governments spend billions each year on economic development efforts, in addition, to investments in infra-structure. Workforce development efforts need to inform and compliment these investments.

Systems Thinking

Understanding Gaps and Capacity

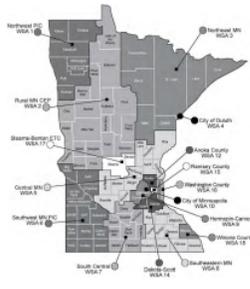
- **Business alignment, using all assets**
 - Help business fully engage with and align in community needs
- **Transportation**
 - Business/economic growth
 - Effect on commute patterns
 - Distress on local system
- **Categorical inventory of assets**
 - Cause-and-effect shifts based on demographic and economic changes
- **Anchor institutions (place-based entities)**
 - Accessibility
 - Opportunity
 - Local procurement
 - Job creation

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Regional Vision & Values

Minnesota Local Workforce Councils

- "Regions" are tricky entities,
- Is it about business-to-business patterns? Or is it about industry sector patterns? Or commute patterns?
- First – WIOA says this is a collaborative discussion among the Governor, local elected officials and workforce boards,
- Suggestions: When faced with aligning regions to a state-strategy, MI workforce boards began the discussion with the questions:
 - What are we doing now that we value and don't want to lose?
 - What are our core values & ethics in operating our workforce board & services?
 - What do we believe quality & continuous improvement? Do we talk about it or do we live it?



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TALKING POINTS

- Two sources of thought on regional planning that might be consulted are:
 - Strategic Doing, a project of Purdue University - <https://pcrd.purdue.edu/signature-programs/strategic-doing.php#Learn>
 - Theory U as developed by Peter Senge, Otto Scharmer and others at MIT - <https://www.presencing.com/theoryu>

- Regional make-ups really provide an opportunity to align systems and integrate where it makes sense. When we think about regional, how do we go about identifying who we should be partnering with, when we should be partnering and how we should go about it?

There are many ways to think about this –

Do demographics tie areas or systems together? Customer base (job seekers)? Businesses? Economic drivers (ie. Anchors, supply chains, etc.) What about systems – K12, Community Colleges, Universities, Assets, etc.?

We are really saying – the connection points from a regional perspective may be found below the surface and may be more systemic. You might want to study yourselves a bit deeper to gain an understanding of your connection points. This will help with both the planning dialogue and the collaboration process.

McMullan, Molly 4/4/16 5:40 PM

Comment [1]: Minnesota or Michigan?

Thoughts on Collaboration

Collective Impact Model

- Large-scale social change comes from better cross-sector coordination rather than from the isolated intervention of individual organizations

Shared Value

- Collaborative efforts are most effective if apart from creating the value for broader community, they also result in value add for each of the cooperating partners
- Requires defining the value and benefits each partner will be getting out of cooperation and communicating that to partners



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TALKING POINTS

- Collective impact is an approach to evaluating the investments being made in workforce development and elsewhere in the region.

Collaboration in Workforce Development Space

What is the Impetus?

- Macroeconomic landscape
- Workforce development does not operate in vacuum
- Larger, regional scale more effective
- Partnering with business crucial for success
- Career pathways
- Economic development data needed for informed decision making
- Serving "the whole person"
- Providing services across generations
- Multiple funding streams for similar activities



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Part VI – Public Policy and the Board

Why?

Public policy is the means by which a government maintains order or addresses the needs of its citizens through actions defined by its constitution.

- Generally not a tangible thing
 - Rather, it is a term used to describe a collection of laws, mandates, or regulations established through a political process
- Workforce development is in large measure controlled via a “political” process
 - Budgets get set and institutions get created, re-created and/or re-directed through the political process

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TALKING POINTS

- In every region, no matter what the boundaries, public policy impacts our work. Understanding that a key activity of a local board is their interaction with policy-makers, is a lesson often left out of what skills a board needs and where it spends some of its time & effort. John Kingdon identified what he called, “multiple streams analysis” of how a policy issue arrives on the public agenda and when all things converge, it creates a “window” of opportunity to deal with the issue.
 - *Problem stream* – attention lurches to a policy problem. (need to deal with the homeless or unemployment among veterans)
 - *Policy stream* – a solution to that problem is available. (more subsidized housing or the root cause of mental health and joblessness is dealt with)
 - *Politics stream* – policymakers have the motive; an election or community event, regional/national polls cause the policymakers to talk about/propose solutions, and have the opportunity to fashion new law/program/increased funding – some action – to respond to the emergent issues.
- Local workforce boards need to be cognizant of both the process of public policy making, but also the issues that are present or emerging. NAWB believes this another illustration of why local matters and why local boards are essential to solving the workforce development puzzle. We invest in economic development and education, locally. We should have and exercise the authority to make investments, locally. It’s ours in the WIOA. We need to practice and execute on the skills of collaboration, workforce data analysis, communications and evaluation.

How does an issue “arise”?



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Meeting with Elected Officials

Understanding	Process	Approach
<ul style="list-style-type: none"> Who are the policymakers? Are they asking for new ideas? What is the policymaking process? Who else is interested in your issue? What are the sources of strength? Resistance? When is the right timing? 	<ul style="list-style-type: none"> If you don't know, get to know the policymakers. What is their agenda? Their "world view"? Who might support this with you that they rely on? Look for "policy windows" & expect the window to open at odd times & odd ways. 	<ul style="list-style-type: none"> Work with policymakers – work with them BEFORE there is the need. Line-up research & data that supports your view. Allow sufficient item and resources to be prepared.

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TALKING POINTS

- Meeting with elected policy makers should not be a once-a-year event but needs to be an on-going dialogue. Too often local boards and staff confuse advocacy with its twin, lobbying. We attempt to help clarify the lines as best they can be. We urge local boards to contact their legal counsel for more specific advice.

Advocacy Versus Lobbying

Advocacy

- The act of arguing in favor of something, such as a cause idea or policy
- Raising your voice!
- There is no limit to the amount of non-lobbying advocacy your organization can do

VS.

Lobbying

- As defined by federal tax law: Any attempt to influence specific legislation
- Can be done in 2 ways:
 1. Contacting/urging the public to contact policy makers for the purpose of proposing, supporting, or opposing legislation
 2. Advocating adoption or rejection of specific legislation

- There are generally 2 sources that can be used to determine the definitions: the IRS regulations under 501(c)(3) rules and the Lobbying Disclosure Act (LDA)
- NAWB suggests local boards contact their solicitor to offer their opinion as to when a contact is made with a "covered" individual and how to classify the meetings.

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TALKING POINTS

What's Next?

What's Next?



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TALKING POINTS

- What's next? Really, the direction and strategy of the board is a continuing analysis of labor market data, the relationships with business and business associations, and an engaging dialogue with the "community" to determine needs. The specific mix of investments, like our personal investments, is a local/regional plan. The players in play, the resources available, the initiatives that define where we live are the lifeblood of the board's determining their mission and focus. NAWB is here to support that work.

Questions?

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Interviews with public and private sector leaders in workforce development, education, business and economic development on key workforce issues and investment strategies to help America compete globally.

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