

New Innovators Professional Learning Network

July 21-22, 2004

San Antonio, Texas

Participants

Juan Manigault (Northern Indiana); Bruce Stenslie (City of LA); Mary Ross and Horace Dicks (West Central Texas); Rodney Bradshaw and Mike Temple (Gulf Coast Texas); Lisa Rice (Brevard County Florida); Bill Loope (Region 1 West Virginia); Peggy Herbertson (and Anthony Padillo sitting in for her one night; Pikes Peak Colorado); Dorcus sitting in for Blair Schoeb (Oklahoma City); Guest: Gary Yakimov (CSW); Facilitators: Nina Babich and Roy Vanderford (CSW)

Workforce Indicators

Gary Yakimov of CSW provided an overview and explanation of the macro and micro Workforce Indicators. A copy of the power point presentation is being provided to the members as an attachment to this meeting summary. Reaction was favorable. While the group may not want to compare their regions to each other's like the "old" Innovators group did due to the fact that the comparison would not be meaningful in any other venue, individual members may be interested in the tool to either:

- Compare themselves to other regions in their state;
- Compare themselves to other regions in the country that may be their traditional competitors for certain types of jobs or that match them economically/demographically;
- Re-determine the indicators at intervals to track trends and improvements;
- Use the data to prioritize key workforce issues that need to be addressed to make their community more competitive.

The group also discussed how the indicators compare to the characteristics of competitive communities that had been brainstormed back in May of 2003. Suggestions and thoughts from the members included:

- ◆ Add a 2 or 3 sentence statement as to why each micro indicator is important
- ◆ Include percent of home ownership as a micro under Cost of Living/Housing
- ◆ Explore the potential for incorporating data regarding:
 - Public Transportation, airports/number of flights/number of passengers, broad band access, and relative cost of utilities to help describe infrastructure.
 - Cost of doing business, building permits, TIF and EZ districts to help describe economic-friendly environment

- Percent of the total workforce seeking one-stop services, community college data on number of employed workers seeking education to help describe a knowledge and skilled workforce
- Number of alternative schools/ percent of students enrolled in such schools, distance learning opportunities, R&D capacities at universities to help describe a strong education system
- Crime rates and Kids Count data as micros under Places to Be.
- Number of CDCs, chambers of commerce, numbers of people participating in community events to help describe engaged communities
- Percentage of people with health insurance, percentage of workers who have access to health insurance through employer
- Entrepreneurial index, GDP changes.

For the next meeting, Yakimov will look at the extent to which such data is readily available across all states (indicator data is only useful for comparisons if it can be obtained in a uniform way for all jurisdictions), as well as determine where the competitive community characteristics would fit into the existing macros, or if additional macros are needed.

The new LED data source was discussed. All New Innovators members are from participating LED states with the exception of Indiana. The LED link is <http://lehd.dsd.census.gov/led/01/index.html>

Measuring the Work of the Board

There are many levels at which measurement can take place:

Individual staff performance at the delivery level and individual staff performance at the board level.

↓

Individual partner performance.

↓

One-stop operator performance.

↓

One-stop *center* performance.

↓

Workforce *system* performance.

↓

Board performance.

↓

Community performance.

Measures of various kinds have been discussed in different ways at meetings of the New Innovators.

- ◆ The Workforce Indicators, if periodically re-figured, could be used to measure the success of a community at improving its competitive characteristics. If also periodically refigured for competing communities, the indicators can tell you whether you are catching up or falling behind in the competitive community race (that is, even if your region is improving on its indicators, if your natural competitors are improving even faster, then you have not really made progress.) The advantage of the indicators is that they broadly address many macro issues and comparisons can be done with any other identified region, without any cooperation needed on the part of that region.
- ◆ Measures being developed by the Gulf Coast for the Regional Workforce System can also be used as measures of community performance. (More notes on Gulf Coast below). They have a community-specific element to them, in that success in training and employing people in targeted industries will vary from community to community depending on the industry and occupational targets that are goals for the region. They represent an excellent way of measuring success on strategic goals, although they could not be used for direct region to region performance comparisons.
- ◆ Tandem measures being developed by Gulf Coast for the one-stop system.
- ◆ Workforce board measures, separate from one-stop measures, and separate from community measures. The individual partners and one-stops have measures they have to meet to demonstrate effectiveness, but how do we measure the board's effectiveness at its role? Of the list of levels on the previous page, board performance is probably the one that has been addressed least.

Handout #3 was discussed which is an attempt to outline measures for the work of the board around the key functions of:

- ◆ Provide strategic leadership
- ◆ Manage the board's work
- ◆ Generate resources
- ◆ Satisfy customers

Suggestions by members included:

- ◆ Define each of the measures/indicators.
- ◆ Change "generate" resources to "leverage" resources.
- ◆ Include under the managing the board's work:
 - Progress is made on metrics identified in strategic action plan – which of course presumes the plan has metrics to begin with. [We need to consider

whether we're talking about the community strategic plan, or the board's strategic plan].

- The board had meaningful discussion in development of the budget, and the budget reflects investment in strategic objectives. (Attached is a multiple-choice document for purposes of starting a budget discussion that Roy and Nina developed for a particularly clueless board).
- The board builds partnerships to get its work accomplished.
- Board members are representative of key industries.
- A measure that might be used is how long board positions remain vacant.
- Do board members use the system? (much talk about this. Does their use of the system add value? What does it mean to "use" the system? Should we be talking about contributing to the system or being involved in it rather than using it?)
- Committees have work plans.
- By-laws and committee structures support the strategic objectives.
- The board builds political capital.
- Quality of agendas for board meetings.

We had a side-tracked discussion of the quality of board meetings; at the next meeting, part of the agenda will be a "mock" board meeting, with Nina and Roy playing the parts of board director and board chair, and the group members playing the roles of board members.

Another side-tracked conversation concerned how board members represent the board when engaging in their "other" lives. Do they take off their board hat when they leave the meeting, or do they look for ways to link the board's work to their own work? No one at this point has attempted social network mapping to see where their members could provide connections. Nina will dig up an example of a social network inventory (Lisa's request).

Work Keys

One of the most difficult tasks in describing the workforce is being able to quantify what exactly the skill base *is*. Education levels don't do the job. A person with a high school diploma doesn't necessarily have 12th grade level skills. Or even 6th grade level. And employers don't describe their jobs in terms of grades, but in terms of what needs to be done.

Work Keys is one of the few tools some of us have come across that has both a job profiling and an assessment process that are measuring the same things, and which produces assessment scores that are transferable across industries. The mistake many local areas have made is in trying to implement systems such as Work Keys as one-stop

initiatives rather than community initiatives, or viewing it as a resource generation tool rather than as an investment that needs to be made to meet the needs of employers and workers. Juan Manigault described how his region views it as a means of addressing their strategic objectives.

A major issue is employer buy-in since the profiles cost money. In Indiana, the state has made the investment in order to bring Work Keys to scale. In Austin Texas, the community college built profiling into the college's general budget and the service is provided without charge to employers who buy assessment and training (because for the college, the real money is in the training). Profiling and assessment are just tools to make sure the employer is investing in the right training. Both Juan and Bill are heavily assessing one-stop customers in order to build a tested pool of job seekers from which employers can choose. If Work Keys is to be used on a job matching basis, the profile must be validated. If the employer is just going to use the assessment scores as one source of information among many about the applicant's qualifications, then profiling isn't even needed. [You can view all the existing profiles from occupations in ACT's data base by going to

<http://www.act.org/workkeys/profiles/occuprof/index.html>]

Note: the legalities of assessment testing are interesting. If the group would like more on this topic, we can address it as a future meeting agenda item.

[Extra note: There was a recent article in the E&T Reporter (April 12) that said the Northwest Wisconsin Board is using an electronic tool that "beats case managers at matching job seekers with openings...increases placements, and makes employers happy." They are using Profiles International out of Waco, TX. The "profiling" part of the system consists of about 300 mostly yes-no questions that job seekers complete, and they are then scored in thinking style, verbal and numerical skills and reasoning, occupational interest and behavioral traits that include attitude and flexibility, among other things. Their traits are matched with the traits of individuals deemed ideal for a particular job. The ideal traits are identified through interviews with supervisors and analyzed by one-stop staff with the assistance of company staff in a way that is measurable.]

Gulf Coast Indicators

Rodney and Mike presented the latest evolution of their experiment in measuring regional and WorkSource success. The measures will be implemented into contractor agreements effective October 1. DOL has not yet *formally* agreed to the measures, but they have informally approved the concept. The region will continue to report on the required federal measures, but the state and DOL has given the nod to pulling those measures out of local contracts [they probably don't really need anybody's blessing to do so, but politically it's a good idea].

They hope that unlike the federal measures, the new measures will help them determine whether they are “doing the right thing.” It should demonstrate the value of the board’s existence. The board doesn’t operate things, so they need to demonstrate the ability to *evaluate* things.

Rodney and Mike noted that the details could be endlessly debated, but at some point you just have to plunge in an *act*. They are demonstrating “acting your way into new thinking” as opposed to the traditional “planning your way into new acting.”

At the October meeting, Rodney and Mike will be able to tell us about implementation and will also have the cookbook for exactly how the data is collected for all the measures so that anybody else could implement it for their own area. The group expressed interest in piloting the measures across all their diverse regions. [I’m seeing a future national conference session with a panel of New Innovators members talking about how they went about implementing the measures and what the different results were.....]

Miscellaneous

Points of interest and sharing:

- Gulf Coast will share their RFP for a business services-dedicated contractor and role of the board committee that oversees the function. A committee of the board oversees the business services unit. Resident services staff are not supposed to touch employers.
- Gulf Coast is redesigning all its services and jobs. Mike will e-mail the link for all their basic updated services and process manual.
- Gulf coast created a program tracking specialist for TANF who does nothing but track all the rules and regulations, client status, etc. and keeps the electronic records. That way, the case managers can focus on case management and get caught up in the data. The program tracking specialist never sees a client.
- Other members who have business service staff will share those job descriptions.
- Lisa will share their contract and report schedule for the employer services contractor. (Attached)
- Does anyone have “job descriptions” for board members themselves?
- Around discussion of getting partners to understand how they contribute to regional solutions for key issues: Nina will share part of document she made up as part of a health care critical skills shortage initiative to help various stakeholders understand the roles they could play, and get them to commit to *something* that demonstrates their relevance to the issue. (Attached).
- Bruce will share the board satisfaction survey that he has used at meetings.

Next Meeting

Colorado Springs. Peggy to identify a site. The plan is to start with dinner on Monday the 25th, meet all day the 26th, and end by noon on the 27th.

Potential agenda items:

- Gary: next iteration of Workforce Indicators. We'll do this at dinner again on the 25th.
- Nina: next iteration of board measures.
- Rodney and Mike: final version of their measures and the "how to" cookbook.
- Mock meeting of the Precious Moments Workforce Investment Board.
- Discussion on outsourcing (to be presented and facilitated by Bruce). Bruce will send his format to Lisa so the white papers are consistent. Papers will describe the issue, outline what the experts say, and describe pros and cons of a position on the issue.
- Discussion on generational issues (to be presented and facilitated by Lisa).
- Future white paper issues: labor shortage (will there be one) and portable benefits (Bill has addressed portable benefits in the hospitality industry).
- Need to look at things that in the last pre-meeting survey people said they are willing to present on:
 - ◆ Bill - Tipping Point initiative and business services unit.
 - ◆ Mary and Janie- Enterprise Facilitator program (helping people start their own businesses)
 - ◆ Lisa - electronic eligibility form
 - ◆ Janie - new Center for Workplace Learning partnership among workforce economic development, and education.
 - ◆ Bruce - advocacy plan
- Might also look for things that people requested help with, to see if others might be able to address:
 - ◆ Changing the state funding formula
 - ◆ Incentives for contractors - criteria, how administered, what happens to unearned funds, etc.
 - ◆ Admin costs as proposed by DOL
 - ◆ Moving boards into community engagement (we'll get at that in the mock board meeting).