

# EXPANDING BUSINESS ENGAGEMENT TECHNICAL ASSISTANCE INITIATIVE

## FRAMEWORK & COMPANION GUIDE



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# EBE INITIATIVE FRAMEWORK: A PROCESS CYCLE FOR EXPANDING BUSINESS ENGAGEMENT

## *A COMPANION GUIDE*

### OVERVIEW

In summer 2012, the US Department of Labor Employment and Training Administration (ETA) launched the Expanding Business Engagement (EBE) Technical Assistance Initiative – an effort to improve the way the workforce system engages the business community and delivers services intended to meet business needs. Teams representing 13 states are collaborating on the project, assisted by ETA and Social Policy Research Associates.

This Companion Guide is a product of the EBE technical assistance effort intended to help state teams align their work and support each other in advancing their project goals. It complements the overall Expanding Business Engagement framework and includes the following:

- Part I: A summary of top-level ‘headlines’ or major themes from the implementation plans submitted by states that suggest shared needs, challenges, and opportunities for collaborative work on solutions.
- Part II: A brief introduction to the Expanding Business Services framework, a summary of each element, and set of questions intended to help state teams apply it as they advance their EBE goals and strategies. An example of how the framework might be used to explore a single goal is also included.
- Part III: A summary of methods, tools, approaches, and ideas that emerge from our convenings. Each time we convene and share ideas, the technical assistance team will add content that has been crowdsourced<sup>1</sup> from state teams to this guide, so that all team members can see the kinds of methods and approaches others are using to address similar issues or challenges.

The EBE project had planned in-person convenings during the course of the Initiative. For a variety of budgetary and administrative reasons, in-person events did not occur. Rather, the Initiative was revised to allow states to pursue in-state team or multi-state convenings and activities, supported by a suite of virtual tools, resources, and other materials developed by the ETA/SPR technical assistance team.

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<sup>1</sup> There are many different definitions of the terms “crowdsourcing.” Used here, it refers to the process of tapping into the ideas, wisdom, and experiences of many people with the intent of accelerating and improving solutions to shared problems or developing products that meet shared needs. Wikipedia offers a brief but thorough history of the term and the website [crowdsourcing.org](http://crowdsourcing.org), is a wealth of information about the process and tools to support it.

All support materials are available on the project's website:

<http://businessengagement.workforce3one.org/ebe-grantee-ta>.

It is our hope that states teams find this information useful in advancing their own projects and in connecting with others with whom they might collaborate outside of formal technical assistance activities.

## I: SUMMARY OF IMPLEMENTATION PLAN HEADLINES

Each state team submitted EBE Implementation Plans to ETA at the end of August 2012. The implementation plans raised many important questions about the nature and scope of business services. The plans reflected states' efforts to address the twin goals of helping business find and develop talent and helping people connect to good jobs, while advancing key public interests – a more prosperous economy and healthier labor market.

The plans varied in their goals, approaches, and specificity. For example, some plans focused on the goals and strategies relating specifically to employer services, while others offered a broader vision of statewide business engagement – including an emphasis on business partnerships aimed at tackling a range of community challenges. All of the plans reflected an effort to align business support policies, programs, and practices across multiple program areas or agencies and across regions or communities in each state.

We identified ten themes that we grouped into four major categories. They are summarized below.

### VALUE & STRATEGY

1. **A prevalent theme emerging from all of the implementation plans was the need to better understand the services and opportunities businesses truly value.** Some plans indicated a general desire to know more about business trends, key industry needs and demands to which they might respond. Others described detailed plans for better understanding which of the services they provide are most valued by business and creating better tools and methods for engaging firms so they can track this information in an ongoing way.
2. **Most plans emphasized very broad goals relating to developing business services, support programs, and policies in conjunction with existing state economic and workforce development initiatives.** Defining the role the EBE effort – and business engagement in particular – will play in advancing state-level goals will be important so that state teams (and ETA) can understand the measurable contributions of the EBE initiative in each state. This kind of understanding will be particularly relevant during the transition between year one and year two, when state teams currently participating in the initiative begin mentoring other states interested in improving their outreach and services to business.
3. **The majority of implementation plans identified goals for both the EBE initiative and the first planned in-person convening, but many also expressed the need for further goal setting and strategy development.** Some teams were continuing to gather input from partners and stakeholders to inform specific goals, while others were seeking assistance to further develop their goals or connect them in the form of a broader strategy. The technical assistance team anticipated that early goals would shift as lessons were learned and new stakeholders were included.

4. **A number of plans raised fundamental strategic questions about the role of the public sector – and workforce development systems in particular – in addressing the talent needs of business.** These plans indicated an interest in clarifying appropriate roles for public sector agencies in providing human resource (HR) services and supports to business, and collaborating with other agencies so that services could be provided more seamlessly.

#### PARTNERSHIPS & COLLABORATION

5. **Almost all plans cited the need for improved collaboration and coordination across programs, agencies, government departments, and within and across key industry sectors as critical in their efforts to integrate services, align resources, and create a more systemic approach to business engagement.** This suggested the need for teams to craft engagement strategies centered on improved collaboration at the program and agency level.
6. **Several plans cited states' intentions to target specific groups of business – either those in key sectors, small business, or business that offer high wages and career development potential.** However, during the first quarter of the project, most states were further defining their target markets (e.g., industry sectors, specific groups of small businesses, or different target groups for different regions or communities), so that they could develop clear and effective engagement strategies for reaching them.
7. **A few plans indicated an interest among state teams in partnering with business for broader collaboration, innovation and co-creation of solutions to significant economic and workforce challenges in their communities.** Three plans cited improving conditions for entrepreneurs among their aspirations. Others named assisting returning veterans. These are community challenges that call for collaboration by many public and private sector partners on a range of issues – and the kind of “trusted partner” relationships to which many state teams aspire.

#### PROGRAM & SYSTEM CAPACITY BUILDING

8. **Most of the implementation plans reported a need for capacity building** in specific program or system-level areas. The most commonly reported capacity-building needs included the following:
  - **Staff Training & Development.** Many teams identified curriculum development and training and/or certification or other professional development activities as a strategy for improving business services and partnerships. Some emphasized the value of overall

skill building for business services representatives, while others placed more importance on the need for consistent service delivery across their states.<sup>2</sup>

- **Service and Program Design.** Most teams described plans to make their programs more relevant to business by improving (or redesigning) existing services, developing new services, or some combination.
- **Employer Outreach.** Cultivating new business customers and partners was also a key area of focus for state teams. Some teams proposed working to improve their brand recognition and reputations by employing social media as a strategy toward that end.
- **Technology Infrastructure.** A number of teams expressed concern that their agency's current technologies did not meet the expectations of employers or were not on par with technologies used in the private sector. Specific technologies state teams indicated they would like to improve include customer relationship management (CRM) systems, job and skill-matching systems, and websites, web portals, and social technologies.

## PERFORMANCE & RESULTS

9. **Most state teams expressed the need to develop more meaningful approaches to measuring the impact of business services and assessing the value of business relationships.** Many teams reported crafting more robust performance metrics for evaluating the quality and impact of business services, as well as exploring new technologies to assist with data collection.
10. **Many teams expressed a need to increase market penetration among targeted firms – especially those in high-growth or key sectors.** Furthermore, teams expressed an interest in gaining a better understanding of how they can get beyond measuring the *use* of services, and begin to assess the *value of their interactions* with their business partners – and how measurement strategies can help them tell the difference.

These high-level findings will guide technical assistance support efforts in the short term. However, the ETA/SPR technical assistance team understands that implementation plans will change over time and represent a snapshot of current goals, strategies, and challenges.

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<sup>2</sup> ETA offers many tools and resources to support staff development, including specific training and development modules for Business Services Representatives together with other web-based tools. These materials are posted on the [Business Services Leadership website](#) and Community of Practice.

## II: THE FRAMEWORK: A PROCESS CYCLE FOR EXPANDING BUSINESS ENGAGEMENT

### WHAT IS THE EXPANDING BUSINESS ENGAGEMENT FRAMEWORK?

Expanding Business Engagement is a complex process.

Unlike many grant programs, the EBE Initiative does not seek to implement a particular model or set of services. State teams share a common focus, but their goals and strategies are quite diverse, and the experience they bring to the initiative is varied.

In addition, the 13 state teams represent a range of agencies, organizations, and firms and stakeholders include policy, program, and business leaders. In some cases, state team members have worked together before, while other teams include members who are working together for the first time.

Finally, the teams represent small East Coast states, large Rocky Mountain states, and states in between. Each state has its own unique culture and context, as do the many communities within them where team members will be working to advance the EBE initiative.

In approaching complex projects like EBE, it is often useful to create a visual map – or a framework – that describes what is common to the diverse teams and members.

A framework communicates assumptions, values, or practices that are shared by initiative members and provides a common language for talking about the initiative as a whole.

The 13 EBE state teams have identified a wide range of goals, strategies, and approaches to the initiative. That is why the framework we propose for this initiative is process-centered. By emphasizing the most critical shared process steps state teams are likely to take, it can accommodate each team's varied aims.

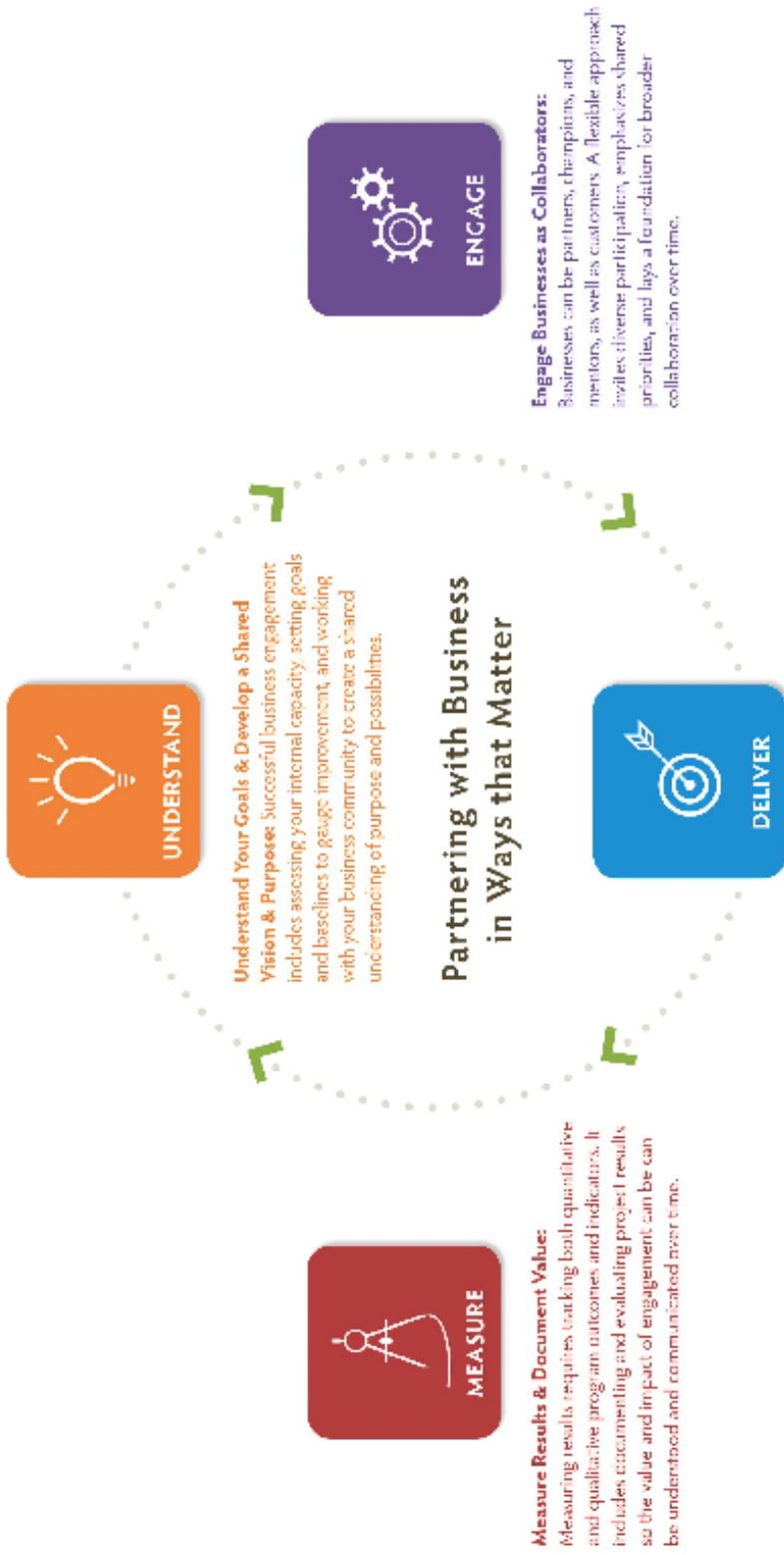
### HOW WILL WE USE THE EBE FRAMEWORK?

We hope the framework is useful in a number of ways:

- As an organizing and communication device, explaining to new stakeholders or partners the core elements of the initiative.
- As a decision-support tool – a way to simply assess choices about what actions teams might take to advance particular goals.
- As a tool for organizing and sharing information, program content and lessons as part of the technical assistance provided throughout the implementation period.

Finally, we hope that the framework will be a useful device to help state teams in their mentoring during the second year of the initiative.





EXPANDING BUSINESS ENGAGEMENT: A FRAMEWORK

The framework represents a process cycle comprising four steps: Understand, Engage, Deliver, and Measure. This cycle can operate at different levels and apply to different goals, strategies, and action steps that state teams take during the EBE initiative.

Each step is briefly described below. A set of guiding questions designed around the implementation “headlines” follows each description and are intended to help the state teams build their strategies and approaches.

## ELEMENT 1: UNDERSTAND



**Understand Your Goals & Develop a Shared Vision & Purpose:** Successful business engagement includes assessing your internal capacity, setting goals and baselines to gauge improvement, and working with your business community to create a shared understanding of purpose and possibilities.

This element is about finding the intersection between your agency or team’s capacity and the opportunities in your target market or community.

You might seek to understand opportunities at different levels.

For state teams just launching business service initiatives – or even redesigning them – an assessment of internal strengths, together with general data about business needs, might be enough to get started. This kind of information provides the kind of baseline to allow teams to target particular markets for outreach and specific services for improvement.

For those with strong partnerships in place already, the opportunities may be very different. It may be that your partner firms are less interested in your services than in your ability to work alongside them to solve important community problems – such as revitalizing Main Street business districts, finding ways to connect young people to work experiences, or bringing new education and professional development opportunities to your state or region.

Teams may be at different levels of understanding for different goals. For example, your agency or team may hold deep knowledge and significant partnerships in one key sector, but be just beginning to explore others.

It is important to employ methods for understanding that are well suited to your particular context. As your capacity and relationships evolve, so too will your understanding of what’s possible through collaboration.

## Key Questions:

- How will you learn what your business community values about your organization, agency, or services? What methods, processes, or approaches will you use? How will you build this discovery process into your operations in an ongoing way?
- Is your EBE team up-to-speed on the strategies you are pursuing under the initiative? Are individual team members clear about their roles?
- Which business services in your agency do staff view most positively/most negatively? Why?
- Which services are you already seeking to redesign or improve? Why? As you make changes, how will you know whether they work?
- What is the contribution of the EBE initiative to your state's overall business services strategy or agenda? Are you clear about how you will assess the impact of the EBE effort over time? Have you determined baseline indicators against which to track improvements?
- What roles will your agency staff play in the initiative? How will they partner differently with businesses as a result of the initiative?
- What are your legal, capacity-related or other questions or concerns about taking on new roles or providing new services?

## ELEMENT 2: ENGAGE



**Engage Businesses as Collaborators:** Businesses can be partners, champions, and mentors, as well as customers. A flexible approach invites diverse participation, emphasizes shared priorities, and lays a foundation for broader collaboration over time.

The second element, engage, is about the many and varying roles that partners can play and the different ways in which they might be engaged in solving important community problems. While engagement can start out focused narrowly – a team working with a firm or industry to define training needs, for example – it can quickly become much more.

Typically, as the purpose of engagement evolves, so do the methods and approaches, with focus groups and formal meetings giving way to action groups and work teams, joint visits to civic groups or elected officials, and co-sponsored community events and fundraisers.

A number of state teams seek to collaborate with business partners in the design of new services or delivery approaches.

## Key Questions

- Have you identified specific strategies for working with internal and system partners that help engage businesses in ways that are clear, simple to understand, and relatively seamless? At what scale are you implementing these strategies?
- Have you prioritized industries, sectors, businesses in specific districts or jurisdictions, or other groups of businesses for engagement in the initiative?
- Is anyone missing from your EBE team who should be there based on your goals and priorities? How will you bring onboard new team members or relevant stakeholders over time?
- What are the key methods, processes, or approaches you are using to engage your business partners? Are there different approaches with different kinds of business partners?
- Are you collaborating on the design and development of new services? How will business partners play a role in testing any new approaches?
- How are you approaching the development of long-term, in-depth partnerships with business that go beyond transactions and move toward collaborative community problem-solving?

## ELEMENT 3: DELIVER



### **Deliver Solutions and Enact Strategies that Add Value to Businesses & Communities:**

Purposeful action planning and strategic design will allow you to deliver valuable solutions to your business partners and lay a foundation for broader investment. These solutions may involve internal improvements as well as external initiatives.

This third element is the most self-explanatory. It's about delivering great services – informed by business – and doing great work. In other words, it's about adding value.

In the early stages, many states focused on internal capacity building – creating in systems and infrastructures that will help deliver new or improved services and collaborate with business in new ways as the initiative matures. Specific areas of capacity building noted in the implementation plans included:

- Staff training and development
- Technology
- Employer outreach

As a result, our questions for this element focus on capacity building.

### Key Questions:

- What is your approach to staff training and development? Are you using a curriculum? Internships (or externships) or apprenticeships? Loaned executives? What are your highest priorities for training? Who is being trained? Is everyone receiving the same training? How will you offer training opportunities (e.g., in-person, online, mobile technologies, etc.)?
- What is your approach to employer outreach? How are you branding business services? Are you integrating social technologies (e.g. social media)? How will you balance efforts to reach employers so they are more aware of your services with efforts to redesign or improve services?
- In thinking about business engagement and service delivery, what are your team’s most significant technology related challenges? What role will EBE play in helping your team address these challenges?
- What kinds of services are you looking to redesign to make them more relevant and valuable to businesses in your community? What new services are you looking to develop? Are there specific models, tools, or approaches from other states or communities you are looking to emulate or employ?
- Are there legislative or policy changes you anticipate having to make to achieve your goals?

## ELEMENT 4: MEASURE



**Measure Results & Document Value:** Measuring results requires tracking both quantitative and qualitative program outcomes and indicators. It includes documenting and evaluating project results so the value and impact of engagement can be understood and communicated over time.

This element is, in part, about assessing the quality, efficiency and efficacy of business services – current business services, new services, and the degree to which the EBE initiative catalyzes changes in each. In addition to tracking activities, measurement also includes documenting value. Because measuring value is not easy to capture, it is an ideal subject for shared exploration.

### Key Questions:

- What is your approach to the business “market?” How do you segment? Do you seek to increase the number of business customers? Increase the value of services? Both? How will your efforts advance the public interest?
- What kinds of performance metrics are you considering to better assess the quality and value of the services you offer or the role you play relative to the business community in your state?

- What are some of the ways you are considering documenting your EBE initiative so that the value created can be observed and understood over time and used to inform future initiatives?

#### SUMMARY

It is our hope that the Expanding Business Engagement Framework can be used in a variety of ways – both to accelerate the progress of state teams and to advance the shared goals of the whole initiative.

We have included one example of each element on page 15 (Exhibit 1).

## Exhibit 1: Using the Framework to Explore “the Value Question”

Grantee A seeks to understand the value their team or agency might offer to business. The grantee provides business services to a small market now, but doesn’t know what services are most appreciated or how the team or agency might play a more valuable role.



**Understand Your Goals & Develop a Shared Vision & Purpose:** Successful business engagement includes assessing your internal capacity, setting goals and baselines to gauge improvement, and working with your business community to create a shared understanding of purpose and possibilities.

Grantee A convenes internal staff and trusted partners and crowdsources information about what is known—such as which services firms use most often, which services generate the highest levels of customer satisfaction, and which services are the focus of existing improvement efforts. At the same time, Grantee A inquires about *new* opportunities for adding value through business services—by reviewing intelligence about market trends, labor markets, and by asking trusted firms what opportunities they see. Prior to meeting with trusted firms, Grantee A experiments with a new approach to intelligence gathering: using social media to “listen” to the twitterfeeds of key businesses for information about talent, training, and human resource needs.

Grantee A develops a basic understanding of existing goals, services, and improvement efforts, and identified new opportunities together with planned outcomes and baseline indicators from which to measure change.



**Engage Businesses as Collaborators:** Businesses can be partners, champions, and mentors, as well as customers. A flexible approach invites diverse participation, emphasizes shared priorities, and lays a foundation for broader collaboration over time.

Grantee A reaches out to a broader business community through a series of small conversations and polls focused on testing this basic understanding and identifying new opportunities going forward. Grantee A learns that existing improvement efforts are valued more in some areas than in others, and identifies a significant new opportunity: the President of the State Chamber of Commerce advises the grantee, “If you really want to make a difference, take on the issue of helping people understand today’s labor market and how to navigate it.”



**Deliver Solutions and Enact Strategies that Add Value to Businesses & Communities:** Purposeful action planning and strategic design will allow you to deliver valuable solutions to your business partners and lay a foundation for broader investment. These solutions may involve internal improvements as well as external initiatives.

Grantee A refocuses internal improvement efforts where they will be most valued. The grantee also launches a solutions team, engaging public, non-profit, and private-sector partners in mapping existing labor market and career navigation services, and designing responses to specific areas of unmet need. Together, these stakeholders develop prototype solutions, and business partners engage their employees in testing the prototypes.



**Measure Results & Document Value:** Measuring results requires tracking both quantitative and qualitative program outcomes and indicators. It includes documenting and evaluating project results so the value and impact of engagement can be understood and communicated over time.

Grantee A realizes measurable gains in customer satisfaction resulting from internal improvements. Also, in partnership with businesses, Grantee A documents employee experiences with the new services quantitatively and qualitatively—using video interviews for example—so that these services can be assessed and improvements made before scaling those that show promise. Business partners begin to see the Grantee as a resource for helping to address other important community challenges.

### III: RESULTS OF CROWDSOURCING: METHODS, APPROACHES, RESOURCES & IDEAS

Each time the ETA/SPR team convenes state teams, we collect information about the ideas and resources the different teams are using to achieve their goals. We use the four process steps in the framework to help organize and curate this content so that it can be shared with all state teams (including next year's mentee states) in ways that facilitate connections among teams with shared interests or objectives, helping to accelerate the entire initiative.

Our first crowdsourcing effort occurred during the EBE webmeeting convened October 3, 2012. We asked state teams a number of questions about their plans, methods, and approaches, and have summarized their responses below.

Additional detail is provided as Appendix A.

#### WISDOM OF THE CROWD - WEBMEETING OCTOBER 3, 2012

##### UNDERSTANDING VALUE: WHERE ARE WE?

There are 13 state teams and there were 30 responses to our question about understanding the value of their roles and services to business. This likely reflects the idea that teams have achieved different levels of progress relative to goals – they may be operating as trusted partners in one sector, but just beginning to collect data on another. It may also reflect the different levels of knowledge and experience of team members who responded to the poll.

Still the aggregate responses provide some insight.

There is considerable experience among many state teams about how to better understand value – 33% of total responders indicated that they had achieved “trusted partner” status. The 20% of respondents indicating they are much earlier in the process of understanding value (and even the 47% somewhere in the middle) should find tremendous value in hearing from their more experienced colleagues about what has and has not worked. We will make every effort to encourage this kind of sharing during our technical assistance activities.

We also asked about the methods and approaches state teams were using to understand the value of their roles and services to the business community.

Respondents identified four primary methods they were using to assess value:

- *Data collection* – including surveys, in-depth analysis, and social media. The complete set of responses is included in Appendix A.
- *Peer partnerships* – sharing information or working together with other business-serving organizations and agencies, such as Chambers of Commerce, Economic Development agencies,



education and training providers, or other kinds of enterprise boards, committees, councils, or initiatives.

- *Convenings* (or co-convenings) – focus groups, regular leader roundtables and other meetings, seminars, and summits were mentioned as specific activities that helped project staff learn about what businesses value about their agencies, organizations, and services.
- *Face-to-face Meetings* – While there may be some overlap between this category and the prior one, the emphasis here is on face-to-face interaction, typically more focused than what would occur at a large gathering, and/or attending events jointly and interacting with employer representatives as peers, not customers or sponsors.

We also polled teams about the partners they have engaged to date. Of 46 responses, workforce board members (9) and policy makers (9) were the most frequently cited, with Business Services Representatives (7) cited often as well. Respondents indicated participation from Rapid Response, Veterans Program, and One-Stop Center staff less often than these other categories.

#### STAFF TRAINING & DEVELOPMENT

Because the vast majority of implementation plans indicated that staff training and development is a key area of focus, we asked state teams specifically about their training plans.

Again, there were 26 responses and there are 13 state teams – and team members may have had different information or experiences to share. Nonetheless, nearly half of the respondents indicated that they were not using a curriculum, and another 27% indicated that they are developing a curriculum now, with another 20% already having done so. At the same time, ETA has developed a curriculum.

We also asked participants about the most unique aspects of their training/staff development efforts. Here are some of the things they said:

- *“We are looking to establish a regional approach, looking at commuter patterns and consultative sales approaches”* (Maryland)
- *“In the spirit of winging it, we have found it helpful to expose staff to the fundamentals of Economic Development as a means of understanding how that process works and how workforce development is a key component”* (Ohio)
- *“Staff identifies areas of need in their individual communities and the common themes are identified for annual training.”* (Montana)
- *“Monthly Statewide Business Services meetings that provide training for all partners within the workforce system in engaging the business community”* (unidentified)
- *“Our goal is to develop an academy with in-person and online training to provide certification for our states business reps. Our training will have 3 to 5 proficiency levels. We want to have consistency across regions.”* (Colorado)

Clearly there is much to be learned and shared about all aspects of training – and delivery – among state teams.

We have started to aggregate staff training and development resources, including links to the ETA curriculum, in Appendix B and Appendix C.

#### TOP TECHNOLOGY NEEDS

Many of the implementation plans also named technology as an area of opportunity, indicating that it was a current weakness and something state teams hoped the EBE initiative would be able to address. We asked participants specifically about their *top three* areas of need.

Of 75 total responses:

- Managing/tracking employer engagement was the most frequently cited area of need (19 respondents)
- Performance tracking/management systems was the second most frequently cited (16 respondents)
- Job/skills matching systems (13) and social (13) and mobile (12) technologies were also frequently cited
- Websites were cited by 3 respondents

Clearly state teams are looking for technologies to help them improve their ability to deliver value to businesses in their communities. More detailed responses are included in Appendix A.

## APPENDIX A: STATE TEAM RESPONSES TO INFORMATION SHARING DURING WEB MEETINGS

October 3, 2012

### Chat 1: Methods and Approaches

*What are all of the methods, processes, approaches, or activities you are using to better understand the value or potential value of business services to the businesses in your state?*

<p><b>Data Collection:</b></p> <ul style="list-style-type: none"> <li>• Statewide surveys by sector</li> <li>• Monthly E-mails</li> <li>• Social media</li> <li>• Customer satisfaction indices</li> <li>• In depth data analysis by key sector</li> </ul>	<p><b>Co-Convening:</b></p> <ul style="list-style-type: none"> <li>• Focus Groups with employers</li> <li>• Regional meetings with multiple partners, such as WBS, local One-Stops and Community Colleges and Rapid Response Units.</li> <li>• Annual business summit</li> <li>• Monthly industry/business leader roundtables</li> <li>• Employer seminars</li> </ul>
<p><b>Peer Partnerships:</b></p> <ul style="list-style-type: none"> <li>• Partnering with Economic Development Agencies</li> <li>• Chamber of Commerce</li> <li>• Quarterly area partnership organizations</li> <li>• Creating Employer Committees</li> <li>• Local Area employer teams</li> <li>• Education and training providers</li> </ul>	<p><b>Meetings:</b></p> <ul style="list-style-type: none"> <li>• Business Service Representative visits to Key business</li> <li>• Face to Face meetings with business and leaders</li> <li>• Employer Councils</li> <li>• Workforce Investment Board Meetings</li> <li>• Engage businesses at community meetings and partnerships such as Society for Human Resources Managers</li> </ul>

## Chat 2: Staff Training and Development

- a. What is the most unique aspects of your training/staff development efforts to improve business engagement?**
- b. If successful, what one thing do you expect to be different in terms of how you engage business?**

### Unique aspects of training:

- Regional approach, looking at commuter patterns and consultative sales
- Webex
- Exposing staff to the fundamentals of Economic Development
- Curriculum was developed by a community college but needs updating
- Staff identifies areas of need in their individual communities and the common themes are identified for annual training.
- Stronger partnerships as our outcome from this training
- Monthly Statewide Business Services meetings that provide training for all partners
- An academy with in-person and online training to provide certification for our states business reps.
- Form subcommittees who will work on commonalities; then train staff on different partners programs
- Multiple partners all communicating about business services that they provide, learning from one another
- Formed group of all 24 regional workforce boards and state-level business liaisons
- Joint meetings with our Job Service Managers and our Workforce Board Directors
- Talent Acquisition Unit, made up of Industry Specific Recruiters to interface with the employer when matching talent to their needs.
- Employer outreach has been a huge topic of discussion for training and presentation

### One thing we expect to be different:

- Better understanding of business needs
- Being a resource for businesses and learning what the business' needs really are
- We want to focus on being proactive, not reactive
- Updated curriculum with more diverse delivery methods such as webinars, social media, Twitter chats, etc.
- Customize responses to businesses unique needs
- Streamlined flow/seamless service provision to employer customers
- United delivery system.
- Customizable approaches for specific business needs

### Chat 3: Technology We Plan to Launch

*What technology-based tools or systems are you planning to purchase, develop, or launch to support employer engagement/service in the next 12 months?*

**CRM Software:**

- Colorado
- Florida
- Maryland
- Massachusetts
- Minnesota (renewal of Salesforce license)
- New Jersey

**Job/Skills Matching**

- Florida
- New Jersey
- Ohio
- Oklahoma

**Virtual OneStop/WebEx Services**

- Minnesota
- Montana
- Ohio

**Social/Mobile**

- Minnesota
- Florida

### Chat 4: “Magic Bullets”

*In your view, what’s the magic bullet for bringing effective business partnerships about?*

- Delivering real value (7)
- Listening/Communication (6)
- Competence (6)
- Leadership/Convening (4)
- Trust/Respect (3)
- Flexibility
- Food

## Chat 5: Surprisingly Effective Engagement Assets

*In thinking about your experience with business partnerships to date – whether specifically employment and training focused or not – complete the following sentence: “We had no idea that doing \_\_\_\_\_ would generate such interest on the part of our business community.”*

### Services:

- Job Fairs (Minnesota)
- Assessments (Florida, Minnesota)
- Labor Exchange (Ohio)
- Workforce Training/OJT (Massachusetts, Montana, Florida)
- Rapid Response (Massachusetts)

### Target Groups

- Working with C-Suite individuals (Florida)
- Entrepreneurial initiatives (Florida)
- Serving veterans (Minnesota)
- Training incumbent workers (Montana)

### Other

- Engagement, Outreach (Oklahoma, Maryland)
- In-house mass recruitments (Florida)
- On-site services (unidentified)
- Pre-employment skills testing (Ohio, Minnesota)
- Business language (Massachusetts, New Jersey)
- Resource sharing (Florida, Montana)
- Modernized facilities (Oklahoma)

## Chat 6: Final Thoughts

*What's one thing that surprised you about what your colleagues shared during this web meeting?*

- So many great ideas/so much knowledge shared (7)
- Common ground, similar challenges/opportunities (5)
- Inspiring/Uplifting
- We have a long way to go
- Technology can help us

November 6, 2012

This webmeeting emphasized information sharing between ETA and EBE grantees rather than peer-to-peer sharing.

December 5, 2012

This webmeeting featured Montana and Massachusetts sharing the most unique aspects of their EBE projects and Melanie Arthur sharing information about the curriculum developed with Greg Newton & Associates (see Appendix B). We also covered the last two elements in the framework.

Peer sharing during the meeting was limited because of the design of the agenda but highlights are summarized below.

### Poll 1: Focus of Planned EBE Service Changes

*In thinking about the program and service-level changes you would like to make over the life of the EBE initiative, which best reflects the primary focus of your efforts?*

- Improving existing services: 42% (13 responses)
- Connecting existing services: 29% (9 responses)
- Designing or developing new services 22.5% ((7 responses)
- Other 6.5% (2 responses)

Note: It is the aggregate responses that reveal more than the subsets of individual response since different people on the same teams responded with different answers more than once.

### Poll 2: Measures

*Which of the following best reflects your progress in developing meaningful measures to capture the value of business engagement?*

- We are researching alternatives and interested in what other states/teams/communities have developed: 41% (11 responses)
- We have developed an initial tool (e.g. balanced scorecard) or set of measures, but have not yet put our approach into practice: 33% (9 responses)
- We have tried a range of approaches but are still looking to improve: 22% (6 responses)
- Eureka! We have found the approach that works for us: 4% (1 response, from the Atlanta regional office)

Note: Aggregating and sharing specific examples of measures, dashboard, and other measurement-related resources may be of value as the project progresses.

## CHAT: THE VALUE QUESTION

Describe an instance in which you knew you really delivered value to a business in your community...

- Job fairs were the common response, with many respondents naming the number of firms recruiting or attending.
- Setting up Employer or Business Councils was also cited by several respondents. This might offer an opportunity for follow up to learn about specific roles, staffing, planned outcomes, and impact.
- Layoff aversion was also cited by multiple respondents. Further discussion might elicit more specific strategies or help articulate value in measurable ways.
- Some examples did not offer “numbers” but provided compelling examples of value in different ways:
  - MT: “Set up a community meeting for a new business by inviting other business to attend. The new business was able to share information about themselves, their product, future goals and employment needs. The turnout was great and the newspaper printed and article about the event.” (Link to article: [http://www.thewesternnews.com/news/local/article\\_60699fc8-63c8-11e1-9bf5-0019bb2963f4.html](http://www.thewesternnews.com/news/local/article_60699fc8-63c8-11e1-9bf5-0019bb2963f4.html)) (Thank you Kari Martel!)
  - SC: “Averted 24 layoffs by providing Reemployment Services to a company that realized the value of its workforce it was losing and shifted the employments into other employment opportunities.” (Thank you Ryan Shelton-Benson!)
  - NJ: “...outreach to companies impacted by Hurricane Sandy to provide space for small companies to work in our Business Resource Centers when they were dislocated...” (Thank you Christine Herzog!)
  - MN: “We determined that every resume in our job bank is valued at \$18. Total value of our job bank is in excess of \$1.4 million.” (Thank you David Niermann!)
  - CO cited the Jefferson County “AddOne” campaign. Link to campaign information: [http://www.ourcoloradonews.com/arvada/news/businesses-asked-to-addone/article\\_32c0fc20-0327-11e2-aa3f-0019bb2963f4.html](http://www.ourcoloradonews.com/arvada/news/businesses-asked-to-addone/article_32c0fc20-0327-11e2-aa3f-0019bb2963f4.html) (Thank you Karen Hoopes!)



## APPENDIX B: ETA BUSINESS SERVICE REPRESENTATIVE CURRICULUM

The Expanding Business Engagement (EBE) website, <http://businessengagement.workforce3one.org/>, houses an entire curriculum, including resources, targeted at workforce staff working with business to complement their local and regional business engagement strategies. The curriculum is presented in a series of short, easy to digest recordings along with companion facilitator guides on a variety of topics and tools for engaging business including: competency models, Labor Market Information (LMI), and using social media with employers and job seekers.

The website content continues to be updated and now includes many new modules under the training curriculum tab that get to the heart of establishing long-term relationships with business customers, defining business services based on employer needs, and recruiting and hiring in today's economy. Below is a list of ten new webinar sessions that will also contain facilitator guides. Most importantly, the curriculum has been road-tested by local workforce system staff from across the country to ensure that it resonates with employers and complements existing business engagement strategies. The new curriculum is focused in four broad areas:

- Clarifying the Roles and Responsibilities for Business Services Staff
- Developing and Aligning Services with Demand
- Marketing and Outreach Strategies
- Demand-Driven Workforce Development

To see the individual courses within these areas, click the link following each course title:

**1.1 Four Primary Roles for Business Services Staff:**

<http://businessengagement.workforce3one.org/clarifying-the-roles-and-responsibilities/deliver-services-1-1>

**1.2 Recruiting and Hiring Has Changed:**

<http://businessengagement.workforce3one.org/clarifying-the-roles-and-responsibilities/deliver-services-1-2>

**1.3 Building Relationships with the Business Community:**

<http://businessengagement.workforce3one.org/clarifying-the-roles-and-responsibilities/deliver-services-1-3>

**2.1 (Re)Defining Business Services Based on Business Needs:**

<http://businessengagement.workforce3one.org/re-defining-business-services-based-on-business-needs>

**2.2 Aligning Job-seeker Strategies with Business Needs and Hiring Practices:**

<http://businessengagement.workforce3one.org/aligning-job-seeker-strategies-with-business-needs-and-hiring-practices>

**2.3 Process and Service Improvements for Job-Seekers to Ensure Quality Referrals:**

<http://businessengagement.workforce3one.org/process-and-service-improvements-for-job-seekers-to-ensure-quality-referrals>

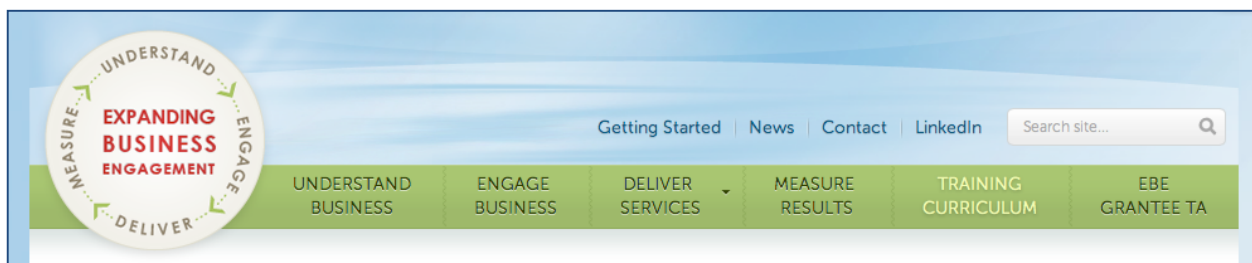
- 2.4 Collecting Information and Ensuring Business Satisfaction:**  
<http://businessengagement.workforce3one.org/collecting-information-and-ensuring-business-satisfaction>
- 3.1. Strategic Marketing to Business Customers:**  
<http://businessengagement.workforce3one.org/strategic-marketing-to-business-customers>
- 3.2. Target Marketing and Business Account Management Strategies:**  
<http://businessengagement.workforce3one.org/marketing-and-outreach-strategies/deliver-services-3-2>
- 3.3. Outreach to Businesses: Tips, Tools and Tactics:**  
<http://businessengagement.workforce3one.org/marketing-and-outreach-strategies/deliver-services-3-3>

In addition, new templates that you can customize and use in your own training efforts are available in the fourth module: Demand-Driven Workforce Development. This module includes one template to customize for these topic areas:

- 4.1 Understanding the Current Economy and Business Market to Develop Targeted Industries or Sectors (based on state/local LMI)
- 4.2 Identifying Current Workforce Development Challenges in Targeted Sectors for Development of Service Delivery Solutions
- 4.3 Demand-driven Alignment: Strategize and Plan for Success

Finally, EBE grantees will see a “tab” on the website where project-specific materials will posted and shared. A click on “LinkedIn” at the top of the page allows all of those dedicated professionals who serve employers to join in a collective conversation with other workforce experts from across the country. We invite you to join us!

We hope this exciting curriculum will expand your own business engagement efforts and as you ask and receive ideas from colleagues in the field, we look forward to learning from your real-world experiences with both the website and the curriculum.



**Business Service Leadership Resources and Community of Practice:**

<http://businessengagement.workforce3one.org/>

**Business Services Leadership LinkedIn Group:**

<https://www.linkedin.com/> [Note: You will need a LinkedIn account to log in.]

## APPENDIX C: ETA BUSINESS SERVICES RESOURCES

### BUSINESS ENGAGEMENT

#### [Effective Employer Engagement: Trends, Issues and Strategies](#)

This presentation provides examples of effective strategies and advice when engaging employers on behalf of their program participants.

#### [Sustaining Partnerships for Regional Economic Growth](#)

The process of building and maintaining these relationships over time – surviving shifting personnel, personalities, organizational focus, and varying resource support – requires a great deal of skill and time on task.

#### [The On the Job Training Toolkit](#)

The OJT Toolkit provides you with customizable OJT templates and forms including outreach materials, contracts, and monitoring documents.

[VIDEO: Dianne Bell - Learn About The On-The-Job Training Toolkit](#)

[VIDEO: Jim Lautenschleger - Develop Relationships With Employers Through OJT](#)

#### [Small Business Toolkit](#)

***Channeling Good Ideas Into jobs: Workforce partnerships that Support Entrepreneurs and Small Businesses.***

This toolkit is designed to assist you in building strong partnerships between the workforce development system and small business-serving organizations to strengthen entrepreneurship and self-employment in your community.

#### [The Competency Model Clearinghouse Tools to Learn About and Engage Business](#)

The **CMC** is a part of the CareerOneStop suite of Web sites and resources, sponsored by the U.S. Department of Labor, Employment and Training Administration.

##### [PRESENTATION: Using Industry Competency Models](#)

This presentation includes the slides for The Competency Model Clearinghouse Tools to learn about and engage the business training module.

##### [TUTORIAL: The Competency Model Clearinghouse Features Tutorial](#)

This tutorial guides the user through the features of the Competency Model Clearinghouse.

##### [RECORDING: Applying Industry Competency Models to Workforce Challenges Webinar](#)

Listen to a recorded session where grantees describe how they use competency models to support their workforce development efforts.

##### [TUTORIAL: Searching the Resource Database Tutorial](#)

This tutorial guides the user through the steps necessary to research the Competency Model Clearinghouse.

##### [ONLINE TOOL: MC Build a Competency Model Tool](#)

##### [ONLINE TOOL: CMC Career Lattice Tool](#)

#### [Department of Labor Electronic Tool Guide](#)

This chart identifies the U. S. Department of Labor Employment and Training Administration Web sites that are most helpful for key user groups.

## O\*NET OnLine

Explore over 900 occupations covering the entire U.S. Economy. Learn about the knowledge, skills, and abilities important to job success. Use this information to help you meet your human resources needs including job analyses, training program development, performance appraisal and HR planning.

### PRESENTATION: O\*NET Products for Business

This **O\*NET Products for Business** PowerPoint e-tools presentation was taught during the *Using E-Tools to Effectively Engage Businesses* training conference.

### TOOLKIT: The O\*NET Toolkit for Business

The **O\*NET Toolkit for Business** provides information and data for HR (Human Resources) professionals to create or enhance their HR planning, job design, succession planning and career development processes.

### ONLINE TOOL: Employer Locator

This tool identifies local businesses in specific industry sectors.

### O\*NET Resource Center

The **O\*NET Resource Center** provides great tools for you to use to accomplish important workforce development goals.

## The Business Center on CareerOneStop

Features information on recruiting and hiring a skilled workforce, links to local training and educational institutions, a civilian to military crosswalk to assist in recruiting Veterans, information about workforce certifications, and a job description writer. <http://www.careeronestop.org/businesscenter/index.aspx>

### ONLINE TOOL: Employer Locator

This tool identifies local businesses in specific industry sectors.

## DELIVERING SERVICES: BUSINESS SERVICE REPRESENTATIVES

### VIDEO: The Attitude Of A Modern BSR

Nestor Brown: The attitude of a modern BSR is to believe that businesses are the customers and the job seeker that meets the needs of business is the public workforce system's product.

### VIDEO: Characteristics of a Successful BSR

Veronica Reyes: Two critical characteristics of a successful BSR are having a sales mentality and not being afraid of rejection.

### VIDEO: LinkedIn Creates a Professional Networking Opportunity

Veronica Reyes: Workforce Solutions has also been actively using LinkedIn via the creation of an Aerospace Transition Center group to help promote candidates to employers as well as provide job leads and create a professional networking opportunity.

### VIDEO: Create A Weekly Job Spotlight

Melissa Terbrueggen: In Florida, there are five counties that are collaborating to create a weekly job spotlight to meet the unique hiring needs of businesses within those counties.

### VIDEO: Strategies To Increase Employment

Ginger Dubois: Learn about two strategies that New Hampshire is using to increase employment: partnering with temporary agencies and promoting job seeker networking groups.

## MEASURING RESULTS

### Measure Results Resources From The Field

PRESENTATION: Use these resources submitted by Business Service Representatives for ideas on how to measure the results from your business services.

[VIDEO: Using LinkedIn To Track Closed Jobs](#)

Veronica Reyes: The Aerospace Transition Center in Houston, Texas is using LinkedIn to track closed jobs with employers and to more effectively meet performance measures.

[VIDEO: Manufacturing Skills Factory Gains Nearly 100% Placement And Retention Rate](#)

Scott Sheely: The Lancaster WIB has worked with employers to enhance the training it was providing for the manufacturing industry so that now the Manufacturing Skills Factory has an almost 100% placement.

This Companion Guide was designed in service of the Expanding Business Engagement (EBE) – Technical Assistance Initiative, a US Department of Labor (ETA) effort to support teams from 13 states in improving program performance through the delivery of enhanced business-focused guided by state-level strategies. This guide provides state teams with a broad overview and synthesis of the key observations that came out of the state’s initial implementation plans and opportunities that exist for future exploration. During each convening, we will add the results of state team crowdsourcing and sharing.

States participating in this initiative include:

- Colorado
- Florida
- Indiana
- Maryland
- Massachusetts
- Minnesota
- Mississippi
- Montana
- New Jersey
- North Carolina
- Ohio
- Oklahoma
- South Carolina