Expanding Business Engagement Initiative
US DOL Employment & Training Administration

About This Manual

In 2012, the US Department of Labor Employment and Training Administration (ETA) partnered with Social Policy Research Associates (SPR) to provide technical assistance and support to thirteen state teams to improve the way they engage their business community. The idea was that more effective engagement would lead to better business intelligence that could inform the design and delivery of improved business services. In turn, states would create opportunities to partner with business on shared workforce, economic, and education challenges throughout the nation.

The project was called the Expanding Business Engagement Technical Assistance Initiative (EBE). ETA and SPR convened participating state teams over the course of a year for a series of web-meetings, peer-learning events, and skill-building sessions with the expectation that these first 13 states would mentor neighboring states in the following year. During these convenings, SPR used a number of planning and facilitation tools intended to help state teams clarify their goals, develop plans, and generally accelerate progress in many different areas.

We have assembled this collection of tools – together with instructions for using them – to help state teams continue to make progress themselves, and to support their mentoring efforts with other states. The tools can be used in a number of different contexts (online or offline) and in different ways.

In this document we demonstrate how the tools can be used to structure and support an in-person convening – such as an institute, bootcamp, or similar intensive planning and learning event for your team – over the course of two or three days.

However, these tools are flexible:

• They can be used “campaign-style” – with bursts of focused energy spent on specific tools over time – to specific ends. For instance, a team may find itself “stuck” – lacking ideas for effective ways to engage employers as part of a new sector strategy. The team could use the Bright Ideas tool, asking all team members to actively seek examples or ideas and add them to the tool. After 30 days, the team could meet and prioritize those idea members would most like to pursue.
They can also be used for planning sessions in a web environment. The Goals and Strategies slide in particular lends itself to this approach. We have used it in a web environment to “crowdsource” risks and expectations associated with different strategic choices, taking notes directly into the slide as team members and partners share their insights.

After completing the activities in an event setting using large wall charts, teams will want to record the information digitally so that it can be used to inform their progress. This also makes it easier to share with teams or regions unable to attend and or the states in mentoring partnerships in Year 2. We encourage photographs (even video!) as well as documents for recording and making information shareable.

We encourage state teams to experiment in adapting the tools to their particular needs.

Find this and many more grantee resources on our website at http://businessengagement.workforce3one.org/ebe-grantee-ta
Tool 1
Agenda, Roles, Rules & Outcomes
EXPANDING BUSINESS ENGAGEMENT PEER LEARNING EVENT

Team Name:

AGENDA

ROLES

OUTCOMES

GROUND RULES

EXPANDING BUSINESS ENGAGEMENT PEER LEARNING EVENT

Team Name:
Instructions for Using **Tool 1: Agenda, Roles, Ground Rules & Outcomes**

This tool is designed to help launch an in-person convening in which one or more teams could participate. As this may be the first time that facilitators will meet team members, we suggest they introduce themselves, note-takers, and any other support staff, before focusing their teams on the task at hand and determining the team-level focus of the convening.

We suggest the following process to facilitators and teams:

1. **Offer introductions & name expectations.** Spend a few minutes doing a round of introductions to find out who is present. Ask each person to share their expectations and hopes for the activity or experience, recording responses on a flip chart pad. (10 to 15 minutes)

2. **Review the purpose and goals of the planned event, activity, or process.** Review event materials (if any). (5-10 minutes)

3. **Discuss anticipated outcomes of planned event, activity, or process.** As a first step to planning how the team/s will spend their time during the event, activity, or process, ask participants to identify anticipated outcomes of the convening. Pre-event surveys, checklists, or assessments (if any) can aid in this process. Facilitators can either ask team members to write on sticky notes and post them on the chart where they can be clustered by topic, or ask team members to verbally share their anticipated outcomes, capturing them directly on the chart – in the sunburst on the right side of the chart. (15 minutes)

4. **Discuss and build the agenda.** Spend some time brainstorming how team members can best use their time to achieve intended outcomes. Use large sticky notes to capture the dates or times and agenda items and post them in the “Agenda” window on the chart. Use flip chart pads for additional days or agenda items. (20 minutes)
5. **Review roles.** This is also a time to formally review the roles of everyone involved (facilitators, team members, etc.) and to discuss any rules or agreements the team would like to address. Facilitators and team leaders may want to talk about how they will interact with team members and what their respective roles are or how they will be shared. Write them on the chart in the space indicated. (10 minutes)

6. **Review ground rules/agreements.** Finally, discuss any ground rules or agreements for working together, recording them in the space provided. (5 minutes)

A completed chart from the first planning session of a 2.5 day retreat is included as an example on page 8.

**Recording Tips:**
- Build the agenda using the large colored sticky notes.
- As illustrated in the example that follows, choose different colors for different types of activities if relevant (e.g., one color for planning time, one for meetings, etc.)
- Write the name of the activity and its time on each sticky note.
- Feel free to revisit and adjust the agenda as needed as the team moves forward.

**Suggested Toolkit for Completing Activity:**
Agenda, Roles & Rules, Outcomes Chart (large wall chart)
Large sticky notes
Small sticky notes
Markers
Flip chart pad

**Anticipated Time Requirements:** Full process will take approximately 45 - 60 minutes.
EXPANDING BUSINESS ENGAGEMENT PEER LEARNING EVENT

**AGENDA**

Wednesday, June 5

1:15– 2:15
Agenda review
Outcomes
Debrief AM session

2:15 – 3:15
EBE Framework
Begin Context
Mapping

3:15 – 3:30
Prepare for SME
session & BREAK

3:30 – 4:30
Bob Lanter SME
visit

4:30 – 5:00
Debrief & Set
Wed. agenda

**ROLES**

- **Facilitator:** Facilitates process and supports team to identify goals; keeps time.

- **Team members:** Engages as active participants, creative connectors and visionaries

**GROUND RULES**

- Everyone participates
- Step up – Step back

**OUTCOMES**

- Find gaps
- Look for opportunities
- Firm up values
- Develop action plan
- Determine clear next steps
Tool 2
The Expanding Business Engagement Process Framework
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.

Partnering with Business in Ways that Matter

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.

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.

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.

EXPANDING BUSINESS ENGAGEMENT: A FRAMEWORK
Instructions for Using Tool 2: The Expanding Business Engagement Process Framework

The technical assistance team used this Framework to structure support provided to EBE grantees during the first year of the Initiative – designing learning and engagement activities around the four elements for example. Because it is process-focused, the Framework can be used to assess ongoing progress on current project goals and those that emerge over time. This can be particularly useful for continuing to build cohesion and a shared understanding of goals among team members, or integrate any new members or partners into project teams. Team members participating in this exercise should be familiar with project goals and will likely have completed both a pre-conference exercise (such as the checklist) and the Agenda tool. Although the instructions below support the use of the tool in an in-person event, the tool and exercise can be adapted to an on-line environment.

We suggest the following process to facilitators and teams:

1. **Introduce the Framework (wall chart version) to team members.** If there are new and more experienced members on the team, the facilitator may ask those more familiar with the Framework to help during the introduction by sharing examples of how they’ve used it during the EBE project.

2. **Write on sticky notes.** Ask team members to place project goals on the Framework (one at a time), indicating where they are in implementing each goal (if team members are just beginning to set project goals, see Tool 5: Goals & Strategies).

3. **Diagnose the level of understanding of project goals among team members.** Some will be quite familiar with goals, while others may not be. Discuss how those who may have less understanding can be supported to gain deeper understanding.
4. **Add new goals and activities as the project progresses or as team members learn about new strategies.** Refer back to Framework and goals and ask if anyone would like to add new goals or revise current goals, based on information shared during the peer learning event.

**Suggested Toolkit for Completing Activity:**
EBE Framework (large wall chart)
Large sticky notes
Small sticky notes
Markers

*Anticipated Time Requirements: 15 - 30 minutes – depending on level of depth explored.*
Partnering with Business in Ways that Matter

- **Identify our primary value to target industries/employers (Survey)**
- **Experiment with alternative performance measures**
- **Determine role of self employment in local economy**
- **Engage target employers in veterans hiring campaign**
- **Pilot CRM system**

**DEVELOP**

Deliver Solutions and Enact Strategies that Engage 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.

**UNDERSTAND**

Goals & Develop a Shared Vision:
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.
Tool 3
Landing Pad
The “Landing Pad” tool is designed to support base-touch or check-in activities. It was developed for in-person peer learning events, such as institutes, but could also be used to keep teams doing intense work quickly on-track over a period of time, especially during the “Understanding” phase of advancing project goals. The idea is to identify questions team members hold, and people or resources they could access to get their questions answered. It is a simple process tool that can help move from “ideas” or “solutions” to action.

We suggest the following process to facilitators and teams:

1. **Ask team members to share issues they would like to learn more about or questions they hold at the launch of a learning event, activity, or phase.** Write them on the chart in the upper right corner making sure that all team members understand the questions and any relevant context. The idea is to engage the team in answering the questions of individual members.

2. **Engage team members in identifying specific people they might engage (such as Subject Matter Experts) or resources they could access (such as reports or data sets) during the learning event and write them in the appropriate sections of the tool in full view of members** (this can also be done using sticky notes and clustering, depending upon time constraints and team member preferences).
3. When team members subsequently reconvene, eliminate questions that have been answered and resources that have been tapped. Record critical learnings under “highlights,” and identify any new questions that team members feel require addressing. Use the center section to record specific follow-up steps that emerge as a result of learning and sharing. NOTE: This tool is designed to be used in conjunction with other tools in this set, particularly Tool 4: Bright & Innovative Ideas, Tool 5: Goals & Strategies, and the Tool 6: Action Planning Tool.

Suggested Toolkit for Completing Activity:
EBE “Landing Pad” (large wall chart)
Small sticky notes
Markers

Anticipated Time Requirements: 30 - 60 minutes.
Landing Pad

**HIGHLIGHTS**
- New ideas about measures for small business
- We can partner with business on things other than services, like college access

**FOLLOW-UP**
- Set up time to meet with Joe (Ahmad)
- Get dashboards from other teams (Kristin)

**QUESTIONS**
- Are we measuring the value we are creating?
- Can tracking of employer engagement be more effective?

**PEOPLE**
- Melanie Arthur (good on BSR development)
- Joe Jones (Subject Matter Expert on Collaboration)

**RESOURCES**
- 2 teams are using new tracking process, we need to learn about these
- 3 teams have dashboards
  1. Ohio
  2. Colorado
  3. Maryland

**TEAM NAME:**
- Meet with Colorado (Sam)
Tool 4
Bright & Innovative Ideas
Instructions for Using Tool 4: Bright & Innovative Ideas

The Bright & Innovative Ideas tool is well suited to brainstorming and debriefing. Typically at the conclusion of a learning activity – a web convening, a seminar, a panel, a conference, or an exchange visit – when team members have many ideas and want to share them. In the context of an in-person peer learning event, this tool allows facilitators to quickly capture and cluster good ideas, in preparation for appropriate follow-up action. It is well-suited to both in-person and online environments and works well in combination with the other tools in this document, especially Tool 5: Goals & Strategies and Tool 6: Action Planning.

We suggest the following process to facilitators and teams:

1. **Engage team members in “quick whip” sharing.** Ask team members to share particularly interesting, innovative or relevant ideas they are excited about and would like the team consider for follow-up. Use sticky notes that participants offer themselves or write directly on the chart. Encourage everyone to share something by calling on all participants by name (or by going around the circle or table if using the chart in-person).

2. **Note common themes or clusters of ideas,** recording them in the circles surrounding the center, and reflecting on how they might support team priorities or advance team goals.

3. **Note questions that emerge** from team members who need more information to understand the ideas or see how they relate to project goals. Transfer those questions to the Landing Pad, so that they can be addressed by the team during the course of the learning event.

**Suggested Toolkit for Completing Activity:**
EBE Bright & Innovative Ideas (large wall chart)
Small sticky notes
Markers

*Anticipated Time Requirements: 20 minutes*
Bright & Innovative Ideas

- Share tasks with partners
- Pilot new ideas before scaling
- Investigate social enterprises in our community
- Gather Real-Time LMI
- Diversify partner base
- Employer surveys
- Information tracking at every point of contact
- Colleges
- Industry Associations
- Communication firms

Develop Comprehensive business engagement plan

Develop plan to nurture business relationships

Team:

Team Name:
Tool 5

Goals and Strategies
The Goals & Strategies tool is among the most flexible in this set. It can be used to craft initial strategies, revise strategies, or generate consensus or clarity about the problems the team is trying to solve. It can be used in a live setting or online. General instructions for using this tool in an in-person peer-learning context follow, but we encourage teams and facilitators to amend the tool and process to meet their particular needs.

We suggest the following process to facilitators and teams:

1. **Review any other tools or information that would help inform strategy development and/or revision.** This includes the work associated with tools 1-4 in this set and any pre-work that was completed in advance of the convening including assessments or surveys. Ask team members to share information that resonates for them or, if teams are advanced in their implementation process, begin by reviewing the status and results of the existing strategy using Tool 2: The EBE Process Framework.

2. **Engage team members in naming goals or suggesting revisions and working through the why and how of each contribution.** Asking team members why they propose the goal, what they expect as a result, what assets they have to deploy in advancing the proposed goal, and whether there are risks associated with it. Record this information in the corresponding areas of the wall chart. This process can be done by writing directly into the document, or by using a sticky note and clustering process in conjunction with the wall chart.

3. **Summarize and review progress** often to see where there is consensus and where there is not to determine which revised goals or changes will move forward, and which will be tabled or subject to further review.

**Ask and answer any clarifying questions** the team will need answered before moving to Tool 6: Action Planning.

**Suggested Toolkit for Completing Activity:**
Goals & Strategies (large wall chart)
Markers
Small sticky notes

*Anticipated Time Requirements: 45 - 60 minutes.*
**GOALS & STRATEGIES**

**Why this change?**
- Small employers have needs we can address
- Most employers are small, but most that we know are large
- Too little diversity amongst employers we work with

**Original Goal**
- Develop services for small business

**Revised Goal:**
- Build employer networks: engage small businesses to set direction

**Strategy:**
- Recruit small business members to advisory board
- Join small business membership organization

**Expected Outcomes**
- New relationships with key small business
- Better advice from business partners
- Strategies are suited to small business (most of our employers)

**Assets**
- Joe knows the president of Small Business Association
- We know the governors small business staff
- We have meeting space they don’t have

**Potential Risks?**
- We don’t have services they will use
- We move too slowly
- Small business won’t have time or won’t understand work
Tool 6
Action Planning
# ACTION PLANNING TOOL

<table>
<thead>
<tr>
<th>TOPIC:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals, Objectives, Priorities</td>
</tr>
<tr>
<td>What we intend to do?</td>
</tr>
<tr>
<td>Tactics/Actions</td>
</tr>
<tr>
<td>How will we do it?</td>
</tr>
<tr>
<td>Lead</td>
</tr>
<tr>
<td>Who is responsible?</td>
</tr>
<tr>
<td>Expected Outcomes</td>
</tr>
<tr>
<td>What is the result?</td>
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<tr>
<td>Date Due</td>
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<tr>
<td>Development Process (Framework)</td>
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<td>Choose one</td>
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<table>
<thead>
<tr>
<th>Date Due</th>
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<tbody>
<tr>
<td>Understand</td>
</tr>
<tr>
<td>Engage</td>
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<tr>
<td>Deliver</td>
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<tr>
<td>Measure</td>
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Instructions for Using Tool #6: Action Planning

The Action Planning tool is a basic template for planning work – the implementation of agreed upon strategies. You likely have templates you already use for action planning, but we have included this one as an example of the kind of tool that can be used as a follow-up to a strategy session like the one associated with Tool 5: Goals and Strategies. Again, it can be used in-person or in an online environment.

We suggest the following process to facilitators and teams:

[Note: This is often an effective hands-on team exercise that can be completed with or without out a facilitator.]

1. **Identify the topic.** Record the overarching topic or issue the goals are intended to address.
2. **Determine goals, objectives, and priorities (or revisions to these elements).** Review the results of any relevant preparatory work, in particular the results of Tool 5: Goals and Strategies, and summarize goals, objectives and priorities team members seek to move forward.
3. **Identify actions/tactics that will need to be taken to advance these goals, objectives and priorities.** List them on the chart and read them aloud to team members to insure consensus.
4. **Determine who is responsible.** Enter the name or initials of the person or persons (or organization) responsible to taking action in the “Lead” column.
5. **Discuss expected outcomes** and enter them in the fourth column.
6. **Specify timelines/milestones** using the “Due Date” column.
7. **Assess and mark the stage of development.** Assess and mark the stage of development for each priority objective using the four process steps in Tool # 2: Framework: Understand, Engage, Deliver, or Measure
8. **Transcribe results from shared activity** to a word document that can be shared with team members and used to track progress.

**Suggested Toolkit for Completing Activity:**
Action Planning Tool (large wall chart)
Markers
Personal copies for each participant
Results of any required preparatory work

**Anticipated Time Requirements: 60 - 120 minutes**
# ACTION PLANNING TOOL

## TOPIC: Building Employer Networks

<table>
<thead>
<tr>
<th>Goals, Objectives, Priorities</th>
<th>Tactics/Actions</th>
<th>Lead</th>
<th>Expected Outcomes</th>
<th>Date Due</th>
<th>Development Process (Framework)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What we intend to do?</strong></td>
<td><strong>How will we do it?</strong></td>
<td><strong>Who is responsible?</strong></td>
<td><strong>What is the result?</strong></td>
<td><strong>Choose one</strong></td>
<td></td>
</tr>
</tbody>
</table>
| 1. Pilot new business engagement approach | 1. Design approach  
2. Identify employers to participate  
3. Launch pilot  
4. Assess value created | Team: (Ahmad, Kristin, Sam) | 1. A new and tested strategy  
2. Improved relationships among cross agency team and business  
3. New Intelligence | 1. May 1  
2. May 15  
3. May 30  
4. Dec 20 |  |

From Bright Ideas Tool

| 2. Join a small business membership organization | 1. Assess cost relative to value  
2. Identify right stakeholders to join  
3. Develop an information sharing process with other EBE partners | Team: (Ahmad) | 1. Improved small business relationships  
2. Better intelligence about small business needs and trends  
3. Improved understanding of our work by small businesses | Join by June 30th |  |

From Goals and Strategies Tool

From Goals and Strategies Tool

**DATE:**
Instructions for Using Tool #7: Report Out

The Report Out tool is designed for use at the conclusion of a retreat, conference, or activity in which it is a priority to share information across multiple teams so they can learn from each other. For example, for EBE state grantees that hold in-person meetings, this tool could be completed and shared to encourage peer-to-peer engagement. It could also be adapted to support state-to-state peer mentoring and sharing activities. The tool could also be adapted for use in more intimate settings – to share the results of small group or committee work, for example. Again, the same process could be used during a live event or in an online environment.

We suggest the following process to facilitators:

1. **Brainstorm “takeaways”,** including lessons learned, changes made and major accomplishments, and reflect on any important turning points. Record them on a flip-chart or sticky notes (or in “chat” in an online environment).
2. **Narrow options and choose two key takeaways to report to larger group.** You may opt to use dot voting, verbal voting or another method to determine options.
3. **Brainstorm recommendations** for improving the larger group process going forward.
4. **Identify spokespersons** and prepare to report out (orally) to larger group. Typically, report-outs are limited to 3-5 minutes.

**Suggested Toolkit for Completing Activity:**
- Report Out Tool (large wall chart)
- Markers
- Small sticky notes

*Anticipated Time Requirements: 20 - 30 minutes.*
Two Key Takeaways:

The importance of learning how to pilot and scale effectively

We can learn a lot from our peers

One Recommendation:

More cross team collaboration in learning how to pilot and scale effectively