This project has been funded, either wholly or in part, with Federal funds from the U.S. Department of Labor, Employment and Training Administration under Contract Number: DOLU121A21890. The contents of this publication do not necessarily reflect the views or policies of the Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement of same by the U.S. Government.
# Table of Contents

INTRODUCTION .................................................................................................................. 2

VIRTUAL SUPPORT PACKAGE .......................................................................................... 3
  Companion Guide and Framework ................................................................................. 3
  Pre-Convening Checklist ............................................................................................... 4
  Planning Tools and User Manual ................................................................................. 4
  Key Tools for Advancing the Expanding Business Engagement Technical Assistance
  Initiative in Your State: A Web Tutorial ................................................................. 5
  Convening Sample Agenda ............................................................................................ 5
  Four Key Elements Readiness Assessment Tool ......................................................... 6

VIRTUAL LEARNING SERIES ......................................................................................... 7
  Transformation Stories: Virtual Learning Series Session 1 ........................................ 7
  Profile and Metrics: Virtual Learning Series Session 2 ............................................ 8
  Social Media That Works Virtual Learning Series Session 3 ..................................... 9

RESOURCES & SAMPLE TOOLS .................................................................................. 10
  State Resources and Tools ........................................................................................... 10
  FPO/State EBE State Team Calls ............................................................................... 11
  Subject Matter Experts ............................................................................................... 12
  Effective Practice Profiles ......................................................................................... 13
  Taking Care of Business 2 .......................................................................................... 14
  Social Media Resources ............................................................................................. 15

WEB CONVENINGS ......................................................................................................... 18
  Web Convening: Grantee Kick-Off Meeting ............................................................... 18
  Web Convening: Preparing Your Implementation Plan: Peer to Peer Web Meeting ... 19
  Web Convening: Peer-to-Peer Web Meeting ............................................................. 20
  Web Convening: Web Meeting ................................................................................... 20
  Web Convening: Peer-to-Peer Web Meeting ............................................................. 21
  Web Convening: EBE’s New Direction – Tools, Resources and a Virtual Event ....... 22
  Web Convening: Meet the Subject Matter Experts .................................................... 22
Introduction

In summer 2012, the US Department of Labor Employment and Training Administration (ETA) launched the Expanding Business Engagement (EBE) Technical Assistance Initiative – a two-year effort to improve the way the system engages businesses. The first year of the Initiative focused on strategic planning and implementation. States formed working teams comprising of industry representatives, experienced state, and local practitioners, and businesses to rethink states’ business engagement activities, respond to the changing needs of local economies, and improve program performance.

Participating states included:

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

During the course of the first year, an array of resources were developed and curated to support the successful implementation of their business engagement strategies and facilitate peer-learning state teams. The Toolkit and Resource Guide contains a complete collection of the resources developed for this initiative including descriptions, thumbnail images, and associated topics for each.

Starting in July 2013, a new emphasis will incorporate peer-to-peer mentoring activities as the state teams reach out to neighboring states to share their experiences, tools, and lessons about employer engagement. This toolkit should springboard peer sharing and mentoring activities in this second year of the project as other states and the broader workforce system benefit from the hard work and inspiration of their first-year EBE colleagues.

The EBE project is a dynamic initiative that continues to evolve as states experiment, learn, grow and share with other states to create a community of practice dedicated to improving the way government engages business. We hope this document will become a compendium of resources for any state seeking to engage businesses in new ways.
Virtual Support Package

Companion Guide and Framework

**VIRTUAL SUPPORT PACKAGE**

**SUMMARY:** The Companion Guide was developed by the EBE technical assistance team 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:

- A summary of top-level “headlines” or major themes from the implementation plans submitted by states in the fall of 2012.

- A brief introduction to the EBE framework, a summary of each element, and set of questions intended to help state teams employ it as they advance their EBE goals and strategies.

- A summary of methods, tools, approaches, and ideas that emerged from convenings, collected so that all team members can see the kinds of methods and approaches others are using to address similar issues or challenges.

**DOWNLOAD COMPANION GUIDE AND FRAMEWORK**
Pre-Convening Checklist

Virtual Support Package

Summary: The following checklist was designed to help prepare state teams for several days of intense learning, capacity-building, and networking activities. It can be used to help teams, both those that are geographically dispersed as well as those that are located together, prepare for in-person convenings or online activities.

Download Pre-Institute Checklist

Planning Tools and User Manual

Virtual Support Package

Summary: This collection of tools -- together with instructions for using them -- was developed to help state teams advance their strategies themselves, and support their mentoring efforts with other states. The tools were designed with the flexibility to 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 person convening -- such as an institute, boot camp, or similar intensive planning and learning event for your team -- over the course of two or three days.

Download User Manual
Key Tools for Advancing the Expanding Business Engagement Technical Assistance Initiative in Your State: A Web Tutorial

VIRTUAL SUPPORT PACKAGE

SUMMARY: This self-paced tutorial serves as an introduction to a set of tools designed to help advance EBE projects and sponsor a peer-learning event in participating states, or in partnership with a neighboring EBE or year two mentee state. The tools were designed for use in different contexts (online or offline) and in different ways.

In this tutorial, we explain and illustrate how the tools can be used to structure and support an in-person convening — such as an Institute, bootcamp, or similar intensive planning and peer learning event that takes place over the course of two or three days.

DOWNLOAD WEB TUTORIAL

Convening Sample Agenda

VIRTUAL SUPPORT PACKAGE

SUMMARY: This is a sample agenda for an event in which teams, working on common goals, come together to learn from each other — a peer learning event. The document was designed to be adapted to meet the needs of teams representing local areas or regions, teams working on strategies for different industry sectors, or teams comprising different agency partners working to solve common problems.

DOWNLOAD SAMPLE AGENDA
SUMMARY: This tool was developed to assist teams in developing and implementing their business engagement strategies at the local and state levels. The tool was originally designed as a pre-event assessment to help the 13 EBE state teams identify priorities and likely areas of focus.

The tool is divided into four parts reflecting each of the key elements that comprise the EBE Framework. These elements are: (1) Understand Goals and Develop Purpose, (2) Engage Businesses as Collaborators, (3) Deliver Solutions and Strategies that Add Value, and (4) Measure Results and Document Value.

DOWNLOAD ASSESSMENT TOOL
Virtual Learning Series

Transformation Stories: Virtual Learning Series Session 1
JUNE 5, 2013

SUMMARY: The first of the Virtual Learning Series, this two-hour webinar focused on the transformative effect that the EBE Initiative has had on state teams and their business engagement approaches. In addition, this web convening highlighted a number of promising practices that have emerged from the field to support successful employer engagement – designing metrics to determine program impact, creating real time dashboards to facilitate labor exchange and understanding labor market needs.

Featured speakers:
- **Tanya Calbert**: Project Manager with Ohio Department of Jobs and Family Services: Discussion of Ohio’s use of the “Wanted Analytics” and “Talent Dashboard”
- **Karen Hoopes**: Statewide Coordinator of Business Development/ Rapid Response with Colorado – Designing a statewide Academy for Business Service Representatives to develop statewide reporting, management, credentialing and certification standards.
- **David Hunn**: President and CEO of SkillSource Group and Executive Director of the Northern Virginia Workforce Investment Board – Case study on developing Return of Investment measures.

RESOURCES AND SUPPORT MATERIALS:
- Web Convening Recording: [Watch Now](#)
- Web Convening Slide Deck: [Download](#)
- Return on Investment Report: [Download](#)
- Transcript: [Download](#)
SUMMARY: The second session of the Virtual Learning Series, this 90-minute webinar highlighted the development of the Massachusetts EBE team’s integrated dashboard for workforce development, economic development and educational agencies. In addition, the webinar focuses on one innovative and employer engagement campaign taking place called AddOne.

Featured speakers
- Ken Messina: Statewide Rapid Response Manager with Massachusetts Division of Career Services. Cross agency collaboration and partnership in developing labor market metrics and dashboards.
- Tim Aldinger: Chief Learning Office of National Association of Workforce Boards. Profile presentation of two examples from the Just AddOne Campaign.

RESOURCES AND SUPPORT MATERIAALS:
- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download
- “AddOne”: Watch Video
- AddOne Newscast: Watch Video
- Transcript: Download
SUMMARY: The final session in the Virtual Learning Series, this powerful 2-hour engagement with Spencer Critchley (Boots Road Group) provides an depth discussion on communication strategies, how to convey messaging and the power of social media for workforce development professionals.

Featured speaker:
- **Spencer Critchley:** Managing Partner at Boots Road Group, LLC

RESOURCES AND SUPPORT MATERIALS:
- Web Convening Recording: [Watch Now](#)
- Web Convening Slide Deck: [Download](#)
- “Don't Mess With Texas”: [Watch Video](#)
- Transcript: [Download](#)
Resources & Sample Tools

State Resources and Tools

**SUMMARY:** Peer-to-Peer sharing has been a key component of the Expanding Business Engagement Technical Assistance Initiative. To help facilitate offline information exchange, the support team reached out to all of the EBE state team leads to collect resources and examples of metrics, dashboards, performance measures, and assessment tools or business engagement protocols. These items were collected as sample resources for the EBE community of practice.

**EBE PERFORMANCE MEASURES**
Expanding Business Engagement performance measures designed by the state of Colorado for Hiring Events, Assessments and Job Fairs. [Download Here](#)

**EBE STATEWIDE DASHBOARD**
Designed by the Massachusetts Expanding Business Engagement State team, the following dashboard was designed to aggregate labor information from multiple agencies. [Download Here](#). For a full explanation of the dashboard see: Virtual Learning Series: Profiles and Metrics

**REGIONAL BUSINESS SERVICES MANAGEMENT PLAN**
This business services strategy document outlines three critical components to develop an effective business service plan, focusing on establishing a regional Market Summary, Business Service Strategy and Measures. [Download Here](#)

**POTENTIAL METRICS AND DASHBOARD**
Potential Metrics and Dashboard developed for the State of South Carolina. [Download Here](#)

**SOUTH CAROLINA LABOR EXCHANGE DEVELOPMENT**
Facilitated a labor exchange session focusing on improving the labor exchange delivery for the State of South Carolina. [Download Here](#)

**BUSINESS ASSISTANCE BROCHURE**
Created by the Minnesota Department of Employment and Economic Development, the following brochure provides a extensive list of Statewide resources and information available to businesses. [Download Here](#)
### BUSINESS SERVICE REPRESENTATIVE RESOURCES BROCHURE

BSR information, services and locations available to business throughout the state of Minnesota. [Download Here](#)

### BUSINESS SERVICE REPRESENTATIVE CONTACT BROCHURE

Brochure for Statewide business service representative contact information for in Minnesota. [Download Here](#)

### COLORADO LEAN EVENT

This PowerPoint comes from the Colorado Department of Labor and Employment week-long Business Service LEAN process. [Download Here](#)

### CUSTOMER SATISFACTION SURVEY

Customer satisfaction survey example from the Anaconda Job Service Workforce Center in Montana. [Download Here](#)

### WORKFORCE CENTER EMPLOYER SURVEY

Employer Survey from the Montana Department of Labor and Industry Workforce Services Division Mission Valley Job Service in Polson. [Download Here](#)

### JOB SERVICE ANNUAL REPORT

Created by the Minnesota Department of Employment and Economic Development, the following report is provided to state businesses. [Download Here](#)

### PERFORMANCE DASHBOARD

Comprehensive Dashboard for the Arapahoe/Douglas Workforce Region in Colorado California. [Download Here](#)

### WORKFORCE INVESTMENT BOARD JOB SERVICE REPORT

Minnesota Business Service Update template designed to update a Workforce Investment Board. [Download Here](#)

---

**FPO/State EBE State Team Calls**

This document summarizes conversations about project goals, needs, and progress between state team leads and their federal project officers held in late fall 2012. The support team used this information to inform the design of web convenings and content of technical support during the EBE project implementation period. [Download Here](#)
Subject Matter Experts

In addition to convening subject matter experts (SMEs) on project-wide conference calls, the project also found innovative ways to connect individual state teams with specific SMEs who could help them with particular challenges. During the last phase of the project, nine subject matter experts were recruited to provide assistance in the key topics area in which state teams were looking for help. State teams were invited to engage SMEs in any number of ways – plan reviews, problem-solving sessions, research, conference or video calls.

To learn more about the Expanding Business Engagement team of Subject Matter Experts in their own words, watch the Web Convening: Meet the Subject Matter Experts from May 3rd, 2013.

TIM ALDINGER  
NATIONAL ASSOCIATION OF WORKFORCE BOARDS

MELANIE ARTHUR  
MELANIE ARTHUR CONSULTING

JOSH COPUS  
NATIONAL ASSOCIATION OF WORKFORCE BOARDS

RODENY BRADSHAW  
GULF COAST WORKFORCE BOARD

REBECCA COHEN  
WORKFORCE INTELLIGENCE NETWORK

LISA KATZ  
WORKFORCE INTELLIGENCE NETWORK

SPENCER CRITCHLEY  
BOOTS ROAD GROUP LLC

ROB GAMBLE  
INNOVATION FOUNDRY

DAVID HUNN  
SKILLSOURCE GROUP  
NORTHERN VIRGINIA WORKFORCE INVESTMENT BOARD

RESOURCES AND SUPPORT MATERIALS:
- Subject Matter Expert Bios: Link
PROMISING PRACTICE PROFILE 1: How Business Engagement Can Help Workforce Programs & Systems Reinvent Themselves

There is a dynamic shift happening in the way workforce development professionals are restructuring and remodeling their approach to business engagement and interagency collaboration. Highlighting the innovative approaches of Colorado, Montana and the City of Phoenix, this profile explores new tools, evolving methodologies of business partnerships and models of interagency collaboration.

- **Montana**: Rethinking business as a partner, not just a consumer, has driven a recent revamping of tools and services provided to the business community.
- **Colorado**: Under a guiding imperative laid out by Governor Hickenlooper’s vision in the “Colorado Blueprint”, the workforce development system has undergone an intense self-assessment. With a specific scrutiny of the consistency and quality of services offered throughout the many independent rural and urban regions, what emerged from this process is worth taking note of.
- **Phoenix**: The bond between workforce and economic development agencies can often be a tenuous one. By adopting an holistic approach to business solutions, these two agencies took a new path to organizational alignment.

RESOURCES AND SUPPORT MATERIALS:
- FULL PROFILE: [Download](#)

PROMISING PRACTICE PROFILE 2: Entrepreneurs & Local Business: How Workforce Professionals Provide Value to Small Businesses

This profile focuses on small business and entrepreneurs in the southeast: South Carolina and at Brevard Workforce on the Space Coast of Florida. Both areas offer lessons from the recession, including tumultuous transition, mass lay-offs, and, ultimately, innovation.

- **South Carolina**’s success at attracting large businesses and corporations such as BMW and Boeing is well recognized. With a desire to expand services to small business as well, In February of 2012 Governor Nikki Haley established a **Task Force** to evaluate South Carolina’s regulatory burdens on
businesses. What they found was a workforce system underutilized and misunderstood by most small business. To address these issues, the SC workforce system undertook a process to fully understand and resolve small business concern. Find out what happened next.

- **Brevard County, Florida**: When the decision to close the Kennedy Space Center was finalized, over 7,000 people lost their jobs in Brevard County starting in mid-2011. Brevard County already had an unemployment rate of 10.8% and the layoffs did not help matters. Innovation developed in the form of new ways to encourage and support entrepreneurship and small business development in the “space coast” region. How does a workforce system that had a long-time reliable employer reinvent itself? Read this profile to learn how.

**RESOURCES AND SUPPORT MATERIALS:**
- FULL PROFILE: [Download](#)

---

**Taking Care of Business 2**

**BUSINESS SERVICE SUMMIT – ATLANTA, GEORGIA**

In May 2013, the Business Services Summit called *Taking Care of Business 2* took place in Atlanta. We contracted with Melanie Arthur of Melanie Arthur Consulting to support ETA in delivering training to Business Services Representatives at a half-day pre-conference. Over 130 BSRs attended the pre-conference. The session provided an overview of ETA’s electronic tools, delivered more formalized training on the Role of BSRs (Curriculum Module 1.1) and 2.1 Redefining Business Services Based on Business Needs (Curriculum Module 2.1), and included time for BSRs to share success stories from their peers. Finally, attendees were given time to workshop a variety of topics with the goal of developing action plans to take away. Representatives from over half of the EBE state teams were able to attend the Summit. All enjoyed the opportunity to meet in person and share ideas.

**RESOURCES AND SUPPORT MATERIALS:**
- CONFERENCE ARCHIVES AND FORUMS: [Website Link](#)
Social Media Resources

Social media was a topic of considerable interest for participating states. State teams were encouraged to learn and experiment with a range of tools throughout the course of the project, including using the project’s LinkedIn group to share ideas and resources.

LINKEDIN:

Everyone involved in the EBE TA Initiative was encouraged to join and use the Business Services Leadership LinkedIn group to share ideas and resources.

TWITTER:

Information was shared about key resources and events using Twitter and by establishing the #engagebiz hashtag so they could be easily rounded up and shared.
We also identified the following among EBE Team Twitter handles:

@WorkforceFL (Florida)  
@MassWorkforce (Massachusetts)  
@PositivelyMN (Minnesota)  
@OhioMeansJobs (Ohio)  
@okggov (Oklahoma)  
@USDOL  
@Social_Policy

By the time you read this, new Twitter handles will almost certainly be in-place, but these are the handles collected during one of the last EBE web convenings in May 2013.

**FACEBOOK:**
Similarly, new Facebook accounts are coming online each day. When we asked our EBE state team colleagues for theirs, here is what they shared:

**Florida**  
https://www.facebook.com/WorkforceFlorida

**Colorado**  

**Indiana**  
https://www.facebook.com/pages/Indiana-Department-of-Workforce-Development

**Minnesota**  
https://www.facebook.com/positivelymn

**Montana**  
https://www.facebook.com/pages/Montana-Department-of-Labor-Industry-Workforce-Services-Division

**New Jersey**  
https://www.facebook.com/NJLabor

**Ohio**  
https://www.facebook.com/OhioMeansJobs.OMJ

**Oklahoma**  
https://www.facebook.com/govcouncil  
https://www.facebook.com/pages/Oklahoma-Department-of-Commerce

**South Carolina**  

**USDOL**  
https://www.facebook.com/departmentoflabor

**SPR**  
**RESOURCE AGGREGATORS**

Discussed in the third session of the Virtual Learning Series, aggregators help automate the searching and publishing of resources on particular topics. They are not websites, they are more like feeds displayed in a variety of styles depending upon the tools. For example, Paper.li displays information much like a newspaper does, whereas Flipboard (and app) display more like a magazine. During our social media session, Spencer Critchley shared a RebelMouse page (which displays more like Facebook) as an example of how topic-specific content could be shared and used to build the reputations of workforce agencies, allowing them to deliver more value to their publics, including businesses.

Examples are listed below:

- **Paper.li/Workforce:** [http://paper.li/newsstand#lpapers?q=workforce](http://paper.li/newsstand#lpapers?q=workforce)
- **Scoop.it/Workforce:** [http://www.scoop.it/search?q=workforce](http://www.scoop.it/search?q=workforce)
- **RebelMouse:** [https://www.rebelmouse.com/businessengagement/](https://www.rebelmouse.com/businessengagement/)
Web Convenings

Web Convening: Grantee Kick-Off Meeting

JULY 19TH, 2012

SUMMARY: The EBE Grantee Kick-Off webinar provide state teams the opportunity to meet one another and introduce the ETA staff and SPR support team. Providing an overview of Initiative expectations and road map for the subsequent two years, grantees learned about the resources and staff available to assist with the design of their implementation plans.

Topics of this webinar Included:

- Overview of the Expanding Business Engagement (EBE) Technical Assistance Initiative
- Introductions and Postcards
- Roles and Responsibilities
- Grant Award Information
- Federal Reporting
- Technical Assistance

RESOURCES AND SUPPORT MATERIALS:

- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download
Web Convening: Preparing your Implementation Plan: Peer to Peer Web Meeting

AUGUST 2, 2012

SUMMARY: Focusing on the “Who, How and Why” of the EBE Initiative, this peer-to-peer web convening introduced states to the tools, resources and strategies available to assist in defining the business engagement goals. Emphasizing the importance of building strong teams, presenters focused on the need to identify and convene state partners to contribute to the drafting implementation plan. The rich peer-to-peer dialogue that emerged from the webinar centered on key areas of business engagement approaches and how to create venues for open dialogue between workforce development agencies and businesses.

Topic of this webinar included:
- Implementation Plans Overview
- Importance of convening the right team to implement the plans
- Team building Exercises
- Implementation Plan goal setting, indicators, and targets

RESOURCES AND SUPPORT MATERIALS:
- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download
Web Convening: Peer-to-Peer Web Meeting

OCTOBER 3, 2012

SUMMARY: This webinar served the dual purpose of 1) introducing teams to the four elements of the Expanding Business Engagement Framework and 2) sharing insights gleaned from a detailed review of state implementation plans. Structured to be highly interactive. Webinar presenters and participants discussed the common themes and highlights that emerged from state implementation plans and participated in collaborative exercises around key Framework elements: Understand and Engaging.

Key areas of discussion focused on:
- Goal setting
- Collaboration and cooperation
- Understanding the value of services to businesses
- Capacity building and staff training
- Measuring and defining metrics for performance and services.

RESOURCES AND SUPPORT MATERIALS:
- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download

Web Convening: Web Meeting

NOVEMBER 8, 2012

SUMMARY: This webinar provided an opportunity to update grantees on developments in the EBE Initiative, answer grant compliance questions and continue to brainstorm on employer and industry engagement. State teams provided a number of examples that have emerged from their work on the Initiative that have developed. Presenters also reviewed resources available on the EBE website.

RESOURCES AND SUPPORT MATERIALS:
- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download
Web Convening: Peer-to-Peer Web Meeting
DECEMBER 5, 2012

SUMMARY: The following web convening explored additional themes that emerged from state implementation plans through the lens of the EBE Framework and highlighted three guest speakers. With the release of the EBE Companion Guide, webinar participants revisited the EBE Framework and participated in a series of interactive polls and discussions focused on Delivering and Measuring the value of business engagement.

Guest speakers included:
- **Melanie Arthur**: Melanie Arthur Consulting
  Presentation on the new BSR staff training curriculum, examples of training session and how to expand and improve business services.
- **Kay Strayer**: Montana Department of Labor & Industry - Overview of Montana EBE team strategy with a focus on engaging small businesses
- **Ken Messina**: Statewide Rapid Response Manager with Massachusetts Division of Career Services.
  Provided a logic model walkthrough and insight into the Massachusetts EBE teams structure and goals.

RESOURCES AND SUPPORT MATERIALS:
- Web Convening Recording: [Watch Now]
- Web Convening Slide Deck: [Download]
Web Convening: EBE’s New Direction – Tools, Resources and a Virtual Event

MAY 3, 2013

SUMMARY: With the EBE Initiative nearing the completion of its first year, this webinar provided an opportunity to review the Initiative’s developments, discuss the state EBE progress, clarify grant details, expectations and prepare for the Subject Matter Expert engagement. Interactive peer-to-peer activities included discussion of metrics, dashboards, social media and success that teams have seen in their states

Highlights Included:

- EBE Updates from DOL
- Walkthrough of online resources
- Review of planned activities
- Interactive chat
- Grants administration

RESOURCES AND SUPPORT MATERIALS:

- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download

Web Convening: Meet the Subject Matter Experts

MAY 17, 2013

SUMMARY: Dedicated to the upcoming Subject Matter Expert appointments, this webinar gave each of the seven SMEs an opportunity to present their areas of expertise and allow for questions from states. Subject matter experts included: Rob Gamble, David Hunn, Melanie Arthur, Josh Copus, Tim Aldinger, Rebecca Cohen, Spencer Critchley and Rodney Bradshaw

RESOURCES AND SUPPORT MATERIALS:

- Web Convening Recording: Watch Now
- Web Convening Slide Deck: Download
- Subject Matter Expert Bios: Download