**WorkforceGPS**

**Transcript of Webinar**

**Integrated Business Services: A Road to Success**

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JENNIFER JACOBS: So again, we want to welcome you to today's webinar, and without further ado I'm going to go ahead and turn things over to our moderator, Christine Quinn, regional administrator, U.S. Department of Labor, Employment and Training Administration, Region 5. Christine?

CHRISTINE QUINN: Thank you, Jenn. Good morning and good afternoon to everybody. I am really excited to be here today to listen to some of our cohort members talk about some of the things that they've been doing and the engagement that they've had through the integrated business services across the region cohort.

And I've been working on the business and demand side of the workforce system for many, many years, and very excited when our new legislation came out under the Workforce Innovation and Opportunity Act and talked about and actually emphasized the importance of working with businesses and employers within our communities and our states.

And so to have this conversation with nine very engaged states, local areas, and regions on this conversation has been extremely beneficial and very excited about the opportunities that they're opening up for everybody across the nation, not only in the workforce system but with their partners who are also part of the cohort, economic development, education, vocational rehab.

I could name hundreds of people and I don't want to forget them but all of the partners being at the table and having these discussions about how we actually work with employers, how we bring that demand to our centers and really emphasize what we can do. So very excited to hear what they have to say today and very excited and thank you all for being on the call today. Todd?

TODD COHEN: All right. Thanks, Christine. Hi, everyone. Yeah. Todd Cohen. I'm director of strategic initiatives for Maher & Maher. So today we've got some I think phenomenal models, practices to share, along with a couple of very specific resources and tools that came out of the cohort that Christine just mentioned. A lot of the discussions we have came from this cohort, a lot of innovative thinking.

We want to share that with you today because it has some implications I think for the field on this topic. We're going to – we'll turn it over to Florida for the CareerSource. Both the state and the Northeast Regional CareerSource will do a joint presentation talking about the state's role in supporting and laying in the groundwork for integrated business services and the regional role and really bringing the partners together and executing on that. And the state and that region in particular, Jacksonville and around there, has long been known for this workforce development, economic development tie, and they've done a lot in this coordinated business engagement and they're going to be here to share that today. We thank them.

Shenandoah Valley Workforce Development Board will take us through some work they've been doing in this area, especially around building business service teams regionally, working on shared data tools. Shenandoah Valley's been also a leader in the state of Virginia on this.

I'll say both of these models and these folks have accomplished a lot in this space, but they're also right in the middle of making enhancements as it relates to business outreach and engagement and I suspect some of the same kind of enhancements that many of you are tackling as you look up to put up this united front for solving business talent needs. So we're going to – they've got some great practices to share, but they're also right in the middle of it. And I think that's appropriate and hopefully will resonate with many of you.

There's who you're going to hear from. So Jeff Ryan, business solutions specialist at the U.S. Department of Labor, the national office, will come in a little bit later. That's me also moderating. And then presenters, Dr. Sharon Johnson, CEO of Shenandoah Valley Workforce Development Board will be speaking. Andra Cornelius, senior VP for business and workforce development for CareerSource Florida state level, and then Melissa Terbrueggen, the regional director of economic development and business services at CareerSource in the northeast region will do their joint presentation. Then finally, you just heard from Christine, the RA at Region 5. So appreciate and thank all of you for participating and sharing your insights today.

Let me just give a little bit more context for this. The innovation cohort that Christine mentioned was held from January of this year through May. Nine states and local areas participated. They were selected through an application process, and they came together to address this challenge. How can talent development organizations better collaborate to respond to regional demand? And this of course is a challenge in just about every state and local area, urban, rural, suburban around the U.S. that we've seen, at least.

How can workforce development, economic development, voc rehab, education, TANF, veteran services, and all the other community organizations better coordinate to reach the business to solve those talent needs? And if we can better coordinate, then businesses will be less frustrated, and chances are their training and education solutions offered back will be more customized and significantly more comprehensive. So moving from that transactional one-off engagement to a true pipeline development.

So when this cohort started back in January, we sort of all started from the same place. Conceptually, we completely get that this – we've got to have this truly coordinated set of solutions, and I think we agreed it's not the norm. It's not the norm around the country. So many places are still very much siloed. Businesses are, at best, confused and, at worst, really frustrated. And if that explains a little bit of the dynamic in your region, your neck of the woods, then I think you'll have a lot to learn and share today as well.

So we tackled a bunch of different things and things that I think – I suspect, again, that many of you are battling. What is a regionalized – a true regionalized business outreach and business services system really look like that cuts across county lines, that cuts across service areas perhaps? What partners are we talking about? It used to be just workforce development, economic development, and higher ed that made up that business outreach teach, but now, you've got a whole bunch of core and key partners, all of whom are working with businesses on training and work-based learning and education and hiring and it's a crowded table.

We talked about data and customer relationship management systems. Many of you are using Synchronous or Salesforce to coordinate some of this. We talked a lot about what are the costs to cover it, confidentiality challenges across partners if you're sharing employer information. We talked a lot about operationalizing regionalized business services. How do you staff that? What does that look like? What are the skill sets that a business service rep or a business outreach person needs to do his or her job well, especially in this post-WIOA focus on sector partnerships, apprenticeships, things like that?

What do they need to do differently today to do their job well? We talked about sustainability. How do you measure whether regional integrated business services is working? And it goes beyond measuring WIOA. The cohort teams talked a lot about it. It's not what's the employer indicators, but there's a lot of different things we could measure to see if this is, in fact, working where we can prove. And we talked a lot about the state versus the local role. There's certainly a role to play for each to make this really work.

So there's your nine teams. We also came up with a couple of things. One of them is attached here. The other is a framework. It included – sort of a national framework that includes five elements of an idealized regional integrated business services system, and then within those elements this framework details a number of specific what we call indicators of success and promising practices.

And so for those of you who are redesigning your business services approach regionally, this is – I think this framework will be a great benchmark to use. It will go live and get disseminated soon, but what is available is the self-assessment, which is attached here. It's aligned very much to the framework. It's a great tool to use as a starting point conversation with your partners in your region to examine how effectively you are measuring up and where improvements can be made.

So I'll talk a little bit more about those things very soon, but in the meantime let me turn it over to our cohort because they're the real voice here. And I'm going to turn it over to Andra Cornelius and Melissa Terbrueggen to take us through the state and local dynamics. So, Andra, starting with you.

ANDRA CORNELIUS: Thank you so much, Todd, and good afternoon, everyone. Melissa Terbrueggen and I are just delighted. We really appreciate the opportunity to showcase a bit about Florida's workforce system, how we work together at the state and local level to ensure we're providing businesses in our state the talent support they need to be both competitive and productive.

So first, a bit about Florida's workforce system. CareerSource Florida is the state's workforce policy and investment board. We create the policies and strategies to make the investments in Florida's workforce system. And this pyramid depicts how we work within our system. We have strong and valuable partnerships led by the governor with the Department of Economic Opportunity and our 24 local workforce development boards.

Our local boards serve Floridians and businesses across the state. We serve large communities and small communities and, in fact, that we are the third most populous state in the nation. Fully, 32 of our 67 counties are considered rural, and the Florida Chamber Foundation tells us that by 2030 Florida will add six million more residents and we will need to create two million net new jobs just to keep up with that growth.

We recruit and place engineers, technicians, professors, skilled tradesman. Any kind of employer who is looking for qualified skilled employees, we help, and we help implement a total talent solution. That's everything from recruitment to hiring to training and retraining. So to us, when we talk about Florida's workforce, workforce development, or Florida's workforce system, we are inclusive.

I'm a part of Florida's workforce system, as are our universities, both public and private, colleges, tech schools, school districts, really any one of us who plays a role in creating a talent pipeline needed by our businesses. And that's the beauty of this cohort. We are deeply appreciative of the U.S. Department of Labor for launching this important work on integrating business services and the new assessment tool and framework that enabled the Florida team to identify strategies that we will advance.

So when I think about the state's role in supporting business outreach, I think it's always easier to remember when we can put it into an acronym or in this case the five C's, and you see them listed there, to communicate, capacity building, calculate, compel, and correct. So let me cover each one of these individually.

First, communicate. At the very highest level, we share our vision that Florida will be the global leader for talent, and we tell the story about the why, the what, the where, the how we're making a positive impact on business and Floridians. And telling the story through a dashboard of key accomplishments many times like private sector companies do is also important, and I'll show an example of our Florida dashboard later in this presentation.

It's important to identify what we're doing for business and showcasing those businesses that have benefitted from our services. They become our champions, our advocates, and a job enables an individual to take care of themselves and their families and providing examples of these stories, of lives changed through work is what our work is all about. In fact, that's why so many of us are passionate about what we do.

Communicating where to access services on a consistent basis was, in part, one reason we rebranded the Florida workforce system several years ago with the same name and a geographic locator. The goal was to enable businesses and jobseekers to better understand what we do. When we resurveyed the market last year, we learned that knowledge resulting from a rebranding about what we do and the services we provide doubled.

So capacity building is very, very important. We want our state and local teams of business professionals to be the very best they can be, just like any private sector company. A company is only as good as employees are. So we leverage our strategic partnerships. We train and provide tools, not unlike what U.S. Department of Labor has done through this cohort. We share peer-to-peer best practices quarterly, and we share our work with other states nationwide. I've actually divided my own team of directors into territories. Each of them works directly with the business service teams and six local boards, and this enables us to have that state and local consistency and connection and actually a personal touch. It gives them a go-to person on all business-related elements.

So calculate. Accountability and transparently and what we do with federal dollars is imperative. So we measure performance and reward performance excellence and services to businesses and jobseekers. In fact, on our website we have a web tool that enables the entire workforce system to view placement and exit metrics as well as business engagement and satisfaction metrics. We also believe that it's very important to show return on investment on training programs.

For those flagship training grant programs managed by CareerSource Florida – that is the quick response and incumbent worker training, for example – they enjoy great business satisfaction and have strong outcomes resulting in our legislature funding these programs annually, and they are long-lived. In fact, quick response training has been in place since 1993. It is enjoying its 25th year, its silver anniversary, and our incumbent worker training program in place for 19 years, since 1999. And here's the real story. Here's the real calculation and accountability.

We look at pre- and post-training wages for employees that benefit from these training grant programs. For incumbent worker training for the last fiscal year, one year post-training those individuals saw an average of 6.4 percent increase in their wages. And for quick response training, again one year post-training, those individuals benefited on average a 43 percent increase in wages.

And then additionally, research. Research that benefits the entire state network is essential. Florida just completed its skills gap and job vacancy survey that provides a snapshot of skills needed across a range of in-demand industries and which industries have the greatest need for talent. CareerSource Florida commissioned the research to drive data-informed decisions, to help shape future education and workforce development strategies and investments.

Going on to compel. In addition to setting the vision, mission, and promise of the CareerSource Florida network, we have the values that reflect what our brand stands for, what we strive to achieve, that is to be business driven, to focus on continuous improvement, integrity, talent focus, and to be purpose-driven.

Our work is meaningful, and we compel and encourage innovation using our state discretionary funds to enable our local boards and their stakeholder partners to test innovative concepts, find ways to support low income working Floridians increase their earnings, or to advance sector strategy implementation and apprenticeships.

Apprenticeships truly hold a renewed promise for meeting middle skill gaps, those open now and in the future. Apprenticeship stands out as a compelling but underutilized option, yet it's a proven, time-tested earn-and-learn model that blends classroom learning with on-the-job experience.

In Florida apprenticeship opportunities are heavily concentrated in the construction and skilled trades sector, yet there are opportunities in other sectors of the state's economy, healthcare, IT, advanced manufacturing, leisure and hospitality. And through the receipt of a state apprenticeship expansion grant, CareerSource Florida and our Departments of Education and Economic Opportunity, along with over 100 business and education leaders, have been hard at work identifying the challenges to apprenticeship expansion and methods for growing this time-tested work-based learning model.

We're figuring out how we and our local board business teams can better support this career pathway as another tool to assist business. In fact, just next week in Miami we're holding a first time ever statewide apprenticeship summit where we will bring forward recommendation and showcase cutting-edge market research on this career pathway.

And lastly, we correct. Through policy and guidance we strive to eliminate hurdles that limit or otherwise restrict our local boards from excelling.

So now, I'll turn it over to my colleague from Jacksonville, Melissa Terbrueggen. Melissa?

MELISSA TERBRUEGGEN: Thank you, Andra, and good afternoon and good morning, everyone. My role today really is to show the local perspective really to integrate the things that Andra has just talked about, not only the local and regional perspective of what we're doing here but how the support we receive from the state really supports our services and drives the success for our region. Jacksonville, Florida is the largest city in our region, but we are not only Jacksonville. We're also smaller counties, such as St. Augustine, the oldest city in Florida. And so as your regions are likely very diverse, so our ours here in the north Florida area.

Want to just give a little bit of local perspective and tell a little bit of our story. The new structure for serving business, which really came about as returned to a focus on sector strategies. One of the first things that I think we all started doing when that focus changed was writing plans and coming up with new ways to make what we were hearing more relevant in our areas. As you all did, we took a big step back. We wanted to assess what we were doing, how we were using our assets and our resources, and figure out how best to drive forward with the changes that were before us.

We had a great team serving business in different ways, but we were missing a component of expertise that we thought we needed under a successful sector strategy plan. So instead of making our relationships more robust and transactional and across the board with many employers, we decided to step back and take a look at how we could serve those employers in our targeted industries more holistically, create partnerships, not just relationships but true partnerships that expanded beyond filling their job needs of today.

The first thing we did, as you all did, is we identified our targeted industries. For us, identifying targeted industries truly needed to align with what our economic development partners were looking at as well and not just economic development but educational. We separated our staff not only to transactional but to targeted industries. So on a transactional side we knew we needed to do all the great things we had always done for years, for decades even, but we knew we needed to change a little bit of our service delivery in order to better serve employers that were in our targeted industries.

We created teams for each of our targeted industries and made sure that those teams were staffed with individuals who could really truly do the work and have the knowledge base. The industry managers for each of those industry teams came to us with industry expertise. They weren't just workforce developers. They were true industry experts who had either worked in the field or worked through the field or had a very strong knowledge base of the industries in which they would be managing with the organization.

We needed them to not only be able to sit at the table with an economic development prospect from somewhere else in the states or somewhere else in the world, but we needed them to also be able to talk with jobseekers and have simple conversations with staff about the industries that we serve. We also looked to identify the underemployed individuals in our area and made sure that through these partnerships we weren't just giving training but we were providing the appropriate skills upgrade training to make them successful in their career path.

It's not just enough to create a team, however, to make sure that we're serving businesses in our area. We needed to really cover from the very beginning to the very end, which also included making sure that we were connecting those workers with the jobs. For us, that meant using technology, making sure that we are getting our hot jobs out there, making sure that our online calendars are accessible, and that they're complete with information about hires. But more specifically for us, we knew that with these targeted industry teams, we needed to make sure that jobseekers had a place to go to get at the information they needed.

So for each of our targeted industries, we implemented portal pages and blogs so jobseekers who are looking for jobs in certain industries had a one-stop shop to get job orders, to get information on training, to get blogs and articles that are relevant to the jobs that they are interested in. So our industry teams manage these industry portal pages and these blogs, and that's been one of the major tools that we implemented to make sure jobseekers had direct access to information in their industry.

We also made it a point to connect with staff through weekly e-mails and weekly calls. There's no such thing as too much information, getting as much information as possible to employees on our teams to make sure they have all the tools that they need. And then of course every job order in our region that is in a targeted industry, we make sure we're looking for jobs – for individuals. We applicant search and make sure we're making qualified referrals to those jobs.

We recognize, lastly, that there's a strength in the partnerships that we make, and this doesn't just include partnerships with economic development and educational institutions, but it's making sure that those partnerships expand to business and community groups and associations, making sure those partnerships are rebuffed and that we're bringing everybody to the table when we have those super important conversations.

And then lastly, the local board support that we receive from CareerSource Florida is so important to what we do. As Andra said, we have a representative from the state that is assigned to our region. We get phone calls. We get e-mails. We get visits. There is a constant offering of what can our state do to help you be more successful in your region. And with all those things together with that support that we receive from the state, with the plans and the organization, we've been able to really carry forth and improve the system that we already had in place to make sure that we're competitive and that we're serving the employers the best we can moving forward.

MS. CORNELIUS: Fantastic, Melissa. You can see why we're so delighted to have people just like her all throughout the CareerSource Florida network, people that are passionate and dedicated about what they do and are so very strategic and innovative in how they accomplish it.

I wanted to share with the viewers the dashboard that I mentioned earlier, a dashboard of key accomplishments. It's not unlike a corporate dashboard, but it's one we created back in 2013 that attests to the value of business services accomplished by the entire network of 24 local boards.

So far this fiscal year we have served over 50,000 businesses in Florida, calling attention also to businesses served in healthcare and advanced manufacturing, our two sectors of focus at the state level. And we're helping to train over 9,000 Floridians through our flagship training programs, quick response and incumbent worker training, and our network has placed over 184,000 Floridians into jobs. And to put context on that, that's 24 people put into jobs every day to date by our local boards, and jobs change lives.

So moving quickly along, I wanted to show everyone the fantastic Florida team that was part of the integrated business services cohort and showcase the work that we used through the self-assessment tool and the framework to do it. Here's our vision with strong emphasis on collaborating, innovating, and leading.

And our top three strategies that our team came up with and are implementing currently are these, to mine industry data sources, to use a common technology tool, and to form a tiger team. For each of them we use the SMART goal setting format that is strategic, measurable, actionable, relevant, and time-oriented. We identify how we would get there, how long it would take, who's responsible, and how we'll know we're successful. So just a bit about each of these.

First, for mining industry data sources, we wanted to asset map existing data sources by each partner engaged, create a skills gap report by sector, and create training on data sources for our business services team members.

The second strategy, using a common technology tool, again, we are assessing with our partners who has a customer relationship management tool, what platform it's based on, what the shared data fields of interest are, how the information within it is collected, is it proprietary, what's the sharing capacity, and most importantly, what are the costs associated with building bridges between the systems?

We here at CareerSource Florida use a Salesforce enabled customer relationship management platform, and we buy for our entire network licenses for all the business service team members to use. This technology enables us to see which businesses we're working with, and it creates an opportunity for market outreach strategies to others.

And then finally, our last strategy is to form a tiger team, and what we mean by this is the formation of a state-level, local-level response team for economic development opportunities, job creation, recognizing that in some cases there are short-term specific company responses needed as well as longer talent pipeline development strategies as well, like what we're achieving through sector strategy implementation.

To do this well we plan to create a collaboration charter, identifying what assets each partner brings to the table, how our funds will be braided, our roles, our common vision, who leads and when, and a collective understanding of the priority to respond. Finally, we hope to create a process map of how the talent solutions are enabled both at the company level and at the sector level, an idea that was spurred by Erik Sander, executive director of the Florida Engineering Experiment Station of FLEX station at the University of Florida and an engineer himself. In fact, Erik coined the term tiger team.

So with that, Todd, I know that Melissa and I have provided lots of information, but that concludes the Florida presentation. If there's time, we welcome questions.

MR. COHEN: Thanks, Andra. Yeah. By the way, somebody pointed out very astutely, why is it not a gator team? Anyway, so that's fantastic.

MS. CORNELIUS: (Inaudible) – graduate.

MR. COHEN: There's so much there. So we're going to have Q&A, by the way, after we do Shenandoah. So we're going to come back and go deeper, but let me just ask one quick clarifying question, Melissa, if you might, and just answer quickly and then we're going to – I'm going to make sure we have time later to go in depth. But when you talk about these business service teams, they're not just WIOA-funded folks; right? Who's – give us a sense of who's on those teams.

MS. TERBRUEGGEN: Well, when we talk about the business services teams that are working with business directly, I mean, we receive funding from multiple different services, but there is WIOA funding there. We – part of that is grant funded, and those teams work with all sorts of jobseeker individuals, not just – they work with individuals who are TANF, who are SNAP. So we – actually, those teams serve all jobseekers and they work with all business and so they receive funding from multiple different places.

MR. COHEN: Great. Thanks. All right. We're going to get much deeper I think into the service teams and other pieces. Please – yeah. Please continue your questions.

I think we're going to get to all of them, but for now, let me turn it over to Dr. Sharon Johnson. Sharon, take it away.

SHARON JOHNSON: Hello, Todd. Thanks so much, and it's great to be with you today from the Shenandoah Valley in Virginia. And I'd like to start off by introducing our team that worked through this wonderful cohort. And first we have Mary Ann Gilmer with Goodwill Industries of the Valleys working here in the Shenandoah Valley. And we have Jeanian Clark from Lord Fairfax Community College and Joan Hollen from the workforce development board and Debbie Melvin from the Virginia Economic Development Partnership.

First of all, I'd like to tell you a little bit about the Shenandoah Valley so you can get a feel quickly for what we are – from where we are working from and the area, the region within which we work. Our geographic location and service region on the map of Virginia, we are area four, the western part of Virginia, the northern central western part of Virginia. Our region is geographically larger with over 5,000 square miles, and we must be able to have two integrated business services teams that are aligned in the services that they provide and with the vision that they have.

We are known in the Shenandoah Valley for being highly collaborative. So I can tell you this has come in handy many times, and we value that trait. We also in Virginia are working with a new workforce system branding initiative with Virginia Career Works, and that will be rolling out completely across the Title I and the workforce centers by September. And we are very mindful of that in the work that we're doing with business services so that we can make sure that we take advantage of every opportunity we can to align with the new workforce brand of Virginia Career Works when we're dealing with business services.

Just to let you know, we operate a little bit differently in Virginia from a lot of other state models. The local areas act autonomously. So there are 15 local areas in Virginia, and we all are responsible for implementing a business services model that we feel is appropriate for our region. We determine what the training will be locally in each of the regions, what outreach materials that we'll have. So it's not uncommon for there to be 15 different sets of outreach materials for business services.

We also work independently on whether we have a customer relationship management system or not and which one we have, and then that can be a little bit complicated when you're working – when one business services rep is working across multiple workforce development board regions. We also work independently on funding and figuring out where our funding is going to come from.

Primarily in Virginia, the funding for business services comes from WIOA, the program part of WIOA. And we each develop our own model that is most appropriate for our own region as far as the actual delivery of business services.

Now, from a state perspective, the Virginia Board of Workforce Development in the fall approved the first business services policy with the Business Services Requirements Policy October the 1st. So we look forward – that policy states that there will be a state business services team that will be convened, and we look forward to that happening in the very near future. I believe that that will happen over the summer. So we are all anxiously watching from a local perspective as to what the next steps will be from a state perspective and how we'll work across the state and the local area.

I want you to be assured that in the Shenandoah Valley we have been delivering business services for a very long time. We were so interested in this cohort and this opportunity because with everything that we have going on with of course the implementation – the changes with WIOA and with the business services policy from the state and with the branding initiative for the state and the new effort by the business services team, we saw this as a perfect opportunity at a local level to reboot and to move into a much more integrated – tightly integrated business services team model. So that's why we were so excited about this effort.

Now, we have many challenges just I'm sure as you all have had over the years of implementing business services, but we are finding right now that business services is so very important. And The reason – and it's important to have an integrated business services team to be a strong and collaborative and efficient and effective as possible because we are seeing that for business services, as we have unemployment go down – for example, in our area right now, unemployment is 2.8 percent.

But as you have unemployment go down, you are working less with jobseekers, and those that you're working with have many, many more barriers and need much more support and help. And you're seeing as the work with jobseekers goes down, the work with businesses goes up. And we think that this in our area is due to, yes, the lasting effects from the recession where that was one of the first things that left when they were undergoing budget cuts within businesses, training and human resource development.

Anything like that that was needed was eliminated, and now, they're quickly trying to play catch up as the economy is so good and they need to be so much more productive. Also, with the low unemployment rate, individuals that they are hiring may have lesser skills than they would like them to have.

So they are looking at opportunities to promote from within and develop their – and control their own talent pipeline from within the business and they're advancing those individuals up and they are bringing in newer individuals that need more training and more development.

It's very important that you get the right people at the integration table, and that was one of the things that we had not done. We felt we had strong business services teams, but we realized that now in today's environment we are missing some key partners around that table. So we took another look at that and expanded the team to be more integrated.

We also are trying to work through fitting the statutory requirements of various partner programs, especially WIOA programs, into an integrated business services model, as that continues to be an ongoing challenge. We are especially interested in the performance metrics across the partnering agencies, what those performance business services performance metrics are to make sure that we understand how each of our partners is being evaluated and that we are supporting each other in those goals and not in some way disincentivizing individuals or agencies with services that are being provided.

We want to make sure we understand how we're doing things now and what's the best way to reengineer for the future, and we continue to work on a common communication tool, specifically a CRM system.

And right now, we're working with a Googles doc type of communication tool, but it is one that can be accessed by all of our partners. So we're looking across other peer groups in the state to see what CRMs they are using and what possibly may come out of the Virginia business services team.

Also, too, sometimes we can have challenges regarding the local workforce development board is identified to have the role to convene the team and coordinate business services activities. This is stated very clearly in our Virginia policy. So we work very carefully to try to coordinate across partners, be a support across partners, convene the partners, but not to run everything and just to make sure that we're the supporting entity to make things happen. But that can sometimes be a challenge as well.

Now, regarding our progress and opportunity, we basically are seeing opportunities everywhere we turn. And to start off with, I think it's really important – and Todd referred to this earlier, and I think it's going to come up at the end of the webinar, but the integrated business services self-assessment that was provided for the cohort is an excellent tool to use.

Wherever you are in the evolution of your business services team, this is a great tool to use at any time to take a look and consider the vision to make sure that that's shared, the demand planning that's necessary, how you all collectively feel you should be engaging with businesses and delivering services, how you can do outreach and communication and have a coordinated message, and very, very important but so often neglected is how to have a sustainability plan and what are your plans for continuous improvement, a cross-partner measures that may be necessary, cross-agency training, regional structure, especially a regional staffing structure to sustain and to coordinate your business services efforts.

We have developed a shared vision that I'll show to you in just a moment, and we also are going to be working on asset mapping and to understand, again, the performance metrics of the different workforce partners that we collaborate with on our integrated business services team.

One highlight that we are working on is functional alignment, and this is referring to a formal structured functional alignment of business services process and metrics across all of our partners where we have together defined a streamlined business process where we're working diligently to prevent duplicative services and business contacts to keep those at an appropriate level and then to always leverage resources and to use what we have as efficiently and as effectively as possible.

In fact, right now we have an RFP out on the street for functional alignment consulting services, and we hope that by the due date the end of June we will have received some very attractive proposals with various strategies and methodologies and approaches for how to achieve, to move, to plan, and to actually implement this functional alignment. So there's much more about that in the RFP that we have out there.

Business services training for all partners. We are working with – there is a state initiative for a sector strategies academy, and this is really a huge step for Virginia because it is the first time that we've brought all of the WIOA partners, business services partners together, and we'll be having training regarding sector strategies, the development of sector partnerships, and the connection of sector strategies with career pathways.

So you will actually have all partners hearing the same message in the same – delivered the same way across the system. So this is a huge step and something that we're very excited about and will align with with our new integrated business services teams approach.

We are working a very exciting thing on an outreach plan, and as part of the outreach plan is the development of a business services app. And this initiative, I'm very proud to say, is being led by businesses in the area, and also on the team are economic development, public workforce system representatives, community colleges, and, again, led by business.

And this is an effort – businesses feel that they are being inundated by business services from multiple perspectives with the business services teams. It can feel that way with the 20 percent work requirement, as required under the youth WIOA program. Now, within Virginia the K through 12 system, work experience is required for seniors to be able to graduate from high school.

So now, businesses will be contacted by high schools in Virginia to work with them for shadowing, mentoring, work experiences, internships, et cetera. So businesses have said, we need a tool in the region where all businesses can go to and they can see what all of these agencies are looking for or have needs for but they don't have time to talk with each one of us individually. So this effort is being led by businesses, and we are very excited to see where this ends up.

We are in the initial design stage of this, and we thought at one point we were a little long – farther along than we are, but businesses came back and said, no. We see this design as geared to the jobseeker or geared to the student, geared to the high school system. This needs to be focused on businesses and it needs to meet our needs and, by meeting our needs, we'll be able to work with and address the needs of all these other agencies and partners. So we're very excited about the business services app.

Also, too, we found very helpful the integrated business services plan template that was provided, and here it is – a picture of it, a diagram here. We found this template, along with the assessment, to be very – a very helpful tool so that we could summarize what it is that we're working on, what our goals are. And at a glance it's very readable and easy to understand, and we would recommend this template to other organizations as well working with their business services team.

Part of where we are was to the formation or the reboot of our integrated business services team, and we have worked through that. And we are working on functional alignment now, which would include some asset mapping and alignment of resources, and that functional alignment initiative is out for bid right now. We have started on integrated outreach materials, and some have already been developed and are under review but have not been – we have not started distributing them yet, but they are in process.

And the CRM I would normally – that would be included normally under communications, but right now, the CRM is such a hot topic for us that we decided to make it a separate category. And we definitely are – will be working on the partner communication plan and data gathering, and I'm sure that will come into clearer focus as the state business services team gets underway.

We are constantly, as many of you, are seeking funding for business services and feel that we are moving toward the funding for a full-time business services manager or business development manager for our region to work with and coordinate with all partners and economic business – economic development in our localities as well as business.

So that in a nutshell is what we are working on and some of the things that we are very excited about as we evolve into a more integrated business services team.

MR. COHEN: Thanks, Sharon. Phenomenal. Phenomenal stuff. Let me ask just a couple of clarifying questions before you go. So the business service team, you talked about how you sort of – you looked at it. You figured out that maybe it wasn't as integrated as it needed to be, and so you brought in others. Can you say a little bit more about who those others were or will be?

DR. JOHNSON: Yes. Other community organizations, a group called Skyline Literacy that does a lot of work with adult education, immigrant organizations, immigrant refugee organizations, and now we're looking at housing as well.

MR. COHEN: Fantastic. And let me – the CRM issue and our cohort of course talked about that at length. Somebody asked a question here about just how do you – if you've got separate CRMs, how do you navigate that? And maybe you could just share a little bit more about that and how getting to one sort of magic bullet or one golden CRM strategy might be hard and maybe say a little bit more about how you're tackling that and how you see the transition going.

DR. JOHNSON: Well, we actually took a look at, for our core business services partners, what were they allowed to use? For those agencies, what platform? How could they access? So we started with the very basics of who is allowed to access what. And then within that, are there any work-arounds that can be achieved to maybe make it a few more options? So right now, we are using Google docs and that is about probably the most basic fundamental you can get but it was something that all entities, all partners could use.

We are trying to, if at all possible – and I don't know how long we'll be able to do this, but we're trying to prevent the requirement for duplicate or triple entry into multiple systems. And – because the – a CRM is only going to be as good as the data that is actually entered into the system and then of course the correctness of that data. But if we can't even get people to enter into a system, then we have a problem there. So we're trying to be proactive in that situation and see what may be very basic but what is usable by all and what will not require duplicate entry.

MR. COHEN: That's helpful. And I think one thing we talked a lot about is it's – don't – and correct me, if I'm off here, both – all of you all, but it wasn't so much about which specific platform makes the most sense, but it's very much about the process that the region's building around h ow that information gets shared and things like that. Is that –

DR. JOHNSON: Yeah. About communication. Yes.

MR. COHEN: Yeah. Yeah. Yeah. Yeah. All right. Thanks. Thanks, Sharon, so much. So stay there. Let me come back to Andra and Melissa. A couple clarifying questions just to – and, Andra, you first. I mean, maybe just say a little more about CareerSource. I mean, it's so integrated with economic development, but maybe just help clarify that and a little bit about the structure overseeing the job centers throughout.

MS. CORNELIUS: Sure. Yeah. In fact, I am a certified economic developer. My team has gone through the coursework offered by the International Economic Development Council and are prime to sit for their own licensure. I know Melissa has done the same.

We felt it was very important, since talent is the new economic development incentive, that we better understand the processes within economic development and bring those into the talent world. CareerSource Florida, with our Department of Economic Opportunity, in Florida we have 100-plus job centers throughout the state. They are managed locally by our 24 local boards. But I can't underscore, again, how important it is to have a fundamental knowledge of economic development principles to enable us to do our job well, particularly on the selling side; right, the value proposition side of talent delivery and talent development. Does that help, Todd?

MR. COHEN: It does. Yeah. That does. Thanks. And, Melissa, this one's – this is a great question. I think you're perfect to answer this, which is – because you're in the northeast and clearly you butt up against another state. So how does your business service approach, your model interplay with Georgia and what's going on there? Do you – I mean, it doesn't just cut off at state lines, I assume. Maybe you can fill in more about that.

MS. TERBRUEGGEN: And that's actually a perfect and very timely question right now. I can say as long as I've been involved in this workforce system, we've had a relationship with Georgia, which is just over 20 years now. Having said that, only through advanced conversations regarding sector strategies and WIOA did we realize that the borders that we've always kind of set up for ourselves really had to be expanded in order to make sure we were really fully serving the businesses in our area.

Because of that, just recently we've created the Florida Georgia Alliance, which has taken the northern counties along the Florida line and really created a partnership with the southern counties along the Georgia line to make sure that we are fully serving our businesses and our jobseekers and making sure everybody has the right opportunity. We know that our employers don't care where the talent comes from. They just want their needs filled.

This Florida Georgia Alliance has been going on for just over a year now. It's – there's plans involved. There's training of staff so our Florida counties know how to talk to jobseekers about the Georgia system. The Georgia system knows how to talk to jobseekers there about the Florida system. We've got some great things planned for that alliance, and we're hoping to really do some great information sharing.

We're looking at where individuals are coming from and commuting patterns. And so right now, that's growing and that's building, but we do acknowledge that in order in this environment to make sure we're serving our businesses the best we can, we do have to look at a system that just doesn't draw lines at the state.

MR. COHEN: Fantastic. So there's a lot of great questions coming in. I want to try to get to most of them. I do want – Jen, if you could pull up back to the slides for a second because I want to get through a few more things and then we're going to – do want to see if we can get to these final questions.

So what we shared with you was [inaudible] models and, obviously, two very good models, but there's a lot of things that came out of this cohort, a lot of things that other states and regions are already doing that are out there and will be out there. So let me just talk through a few of them, and I'm going to ask – there's a couple other cohort team members that are on the phone. I'm going to ask you to talk too, if you would.

So Mass BizWorks, Massachusetts system. It's a centralized system. They've done a lot of very good things in this space. One thing to point out here is a resource guide. So centralized guide for businesses that shows them in a handy way the resources, the talent-specific resources that are available from the resources available to them. So that's something that's available, sort of an asset map, kind of like Andra was talking too. But that's great reference. Use that. See that. Don't start from scratch on that.

Somebody asked – well, let me – so this also speaks to the across state lines piece, but Ohio Area 6, Business Resource Network there has done a lot of tremendous things. Started small in Ohio and is now in Pennsylvania. I think it's about to be in West Virginia. Kelly, I think – are you on the line?

KELLY: I am.

MR. COHEN: Kelly, yeah. I wonder if you could really quickly maybe just talk us through the BRN, but I highlighted a couple things here that I thought are very specific and phenomenal and maybe folks could pick a few of them. But why don't you share with us a little bit about BRN?

KELLY: OK. So the Business Resource Network is a strategic alliance of local, regional, and state organizations that use a collaborative approach to bring businesses services to the local business community. The BRN currently includes 40 partners, consisting of economic development, governmental, academic, technical, and workforce development organizations that offer programs and expertise to businesses. Whether their needs are financial in nature, involve employer recruitment and training, technical help, or other unique challenges, the BRN can offer assistance.

The process starts with a straightforward interview to learn what challenges and opportunities that our employers may be facing. Based on that interview, the BRN partners confidentially review, analyze, and discuss the information. We then package and deliver a proposal to the employer with the best ideas and programs that we have to offer. At their discretion, we then help them implement the programs and recommendations that they want. The BRN is a model that is designed to provide one-stop shopping for businesses. Our intent is to help businesses strive, grow, create jobs, and provide ongoing ways to be of assistance to local business – to the local business community.

And the other thing that I wanted to point out too is for the CRM system, we use Synchronous. And the reason we use Synchronous and picked Synchronous was it was customizable to our needs. So we were able to go in and customize it to meet the needs for the data that we wanted to pull out, and again, the data that we wanted to put into the system. So it helps us track our interviews, our challenges, and ups and gives us general access to information, trends, and areas of importance. And it also helps us to align with our other economic development partners.

MR. COHEN: Thanks, Kelly. Yeah. All the partners on these teams are asking the same set of interview questions, and then you all – I think underneath this and we don't have time to get into it but is all these partners coming together around a table to talk about what they've heard and figuring out the right set of solutions and then coming back to business with a customized proposal. So you have – I mean, I think there's templates here that Ohio has that I think Kelly would be willing to share; right?

KELLY: Sure.

MR. COHEN: So we'll make that happen. Thanks. And then somebody asked a question about the training that your business service reps and your outreach specialists get, and that's a perfect segue. And I'm going to ask Marcia Black-Watson from Michigan to come in and talk a little bit about what they've done in Michigan around that. Marcia, are you there?

MARCIA BLACK-WATSON: Yes. Thank you, Todd. So Michigan's business solutions professional training and certification program, which is administered through the Michigan Works! Association here in the state and led by my cohort colleague Joe Quick, has been operating for the past 11 years since 2007. And there's over 1200 trained through 35 cohorts, primarily from workforce development, economic development, education, but many, many other partners really across our state system.

It's delivered through a six-day cohort model, which occurs over a 90-day period. It includes lecture, small group work, roleplaying, extensive case study applications, projects, homework exercises, as well as post-graduation field work. And all of that comes together in a full certification as a business solutions professional. So that professional then is trained to work within our demand-driven system to provide a holistic comprehensive offering to address the employer needs. And that professional really is trained how to avoid duplication of contact with companies, as well as to provide those coordinated solutions across partners.

And so this is all based on a – what we call a BSP philosophy, which focuses on five important elements. One is asset knowledge. We heard a lot about asset mapping today. So that's knowing what your assets are that your organization can provide to businesses and what assets can be provided by your partners.

Business relationships is number two, creating and maintaining those productive business relationships with your customers and really becoming a valued resource to those that you serve and those that you interact with.

Three is networks, developing and maintaining those strong partner networks that result in adaptive and responsive approaches to business. Four, partnerships, formulating very strong partnerships and providing comprehensive coordinated solutions that really build to the strengths of each partner organization. And then five, a structured process, and that's a consistent process in your interactions with employers to ensure that the identification of challenges and opportunities and then the solutions really address the employer's pain points. And so within those five elements there is a structured five-step process. Very quickly, entry, fact finding, solutions design, implementation, follow up. So we have 1200 individuals that have been trained in this particular process and approach, and it's really resulted in a collaborative system here in Michigan, a no wrong door policy to accessing business solutions services. And that's really focused on employer needs, which is our primary customer here in the state of Michigan.

MR. COHEN: Fantastic, Marcia. And I – so again, if you're out there and you are thinking about professional development for outreach business service solutions folks, I mean, don't – just again, don't start from scratch. Michigan's done some great work. At the very least, it provides a great framework that you might consider building on for your region. Thanks. Thanks, Marcia.

And then, Marcia, if you would, too, go back to the self-assessment tool that we've been talking about. It is available right there. You see it to be downloaded, but you have – you're now doing something with this tool around the state; right?

MS. BLACK-WATSON: We are, Todd. We found the self-assessment tool to be very beneficial, and of course our state team, we had the opportunity to really highlight areas of opportunity and improvement. And we really want to address this across the state, and so we feel like it would be beneficial for business services teams through our partner networks to have the opportunity to take this assessment as well that's in workforce development, economic development, vocational rehab, and the like.

And so we have – we spent a great deal of time on the assessment tool as a state team, and so to ensure the highest level of participation really at the local and regional level, our local economic development partner converted that assessment tool into a really nice survey, a survey tool that can be completed a little more quickly than we did with the assessment. And so we are actually rolling out that survey to our various regional teams.

Today is actually the launch, and we're going to take the results from that survey and really begin the discussion around developing regional plans of action across our business services teams. So we actually have a forum that has been scheduled for July 19th where the business services teams will come together, report out the results of the survey for their region, and then those action plans will actually be identified and we have developed a follow-up protocol over the next several months to make sure that there's progress across the regions that comes from the results of the survey and that business assessment. So we have found it very valuable, and we want to deploy it across the state.

MR. COHEN: Phenomenal. Thank you so much, Marcia.

All right. We've got – we've just got about five minutes here left. Jeff, I would like to turn it over to you to talk a little bit about where folks can go and maybe some next steps around this. So Jeff?

JEFF RYAN: Thanks, Todd. So we do have on the WorkforceGPS site a business engagement focused community of practice called the Business Engagement Collaborative. This site is designed primarily to share blogs, resources, discussions, et cetera around topics of business engagement, rapid response via – (inaudible) – sector strategies. We really intend this site to be a peer-to-peer sort of networking and resource sharing site. We want it to be a vibrant community, and we really in order to do that need your participation. We need your resources. We need your stories through blogs and sharing on discussion boards and chat.

So please go to businessengagement.workforcegps.org and register for the site, if you haven't done so. Hopefully, we'll be seeing some of the output from the cohort. Currently, the self-assessment tool is posted at that site under the resources tab. So there's – that will continue to be added to as we get finalized other materials, but please, if you do have stories you want to tell or resources you want to share, you can contact me through the site. My e-mail is also on this PowerPoint, ryan.jeff@dol.gov, and we can see about posting your materials.

And finally, just to really wrap this part, we do want to keep a lot of the activities and the excitement from the cohort going. At ETA we're looking for ways to incorporate the outcomes of this cohort, including the framework document that Todd has referenced, into future guidance.

As I mentioned, we do want to keep the community of practice on the Business Engagement Collaborative active, and there is a possibility that we'll be seeing a state/local led national convening related to business engagement. That's very, very early stages, but at this point anything we do know about it will be posted to the CoP so that anybody can get involved who is interested in that. And that's all for me, Todd. Thanks.

MR. COHEN: All right. Thanks, Jeff. So I think we're going to end it. I want to – there are a few questions. I think what we could do is, if you – what we could try to do is answer as many as we can and post some of that to the community of practice. So for those folks who've asked can get their questions answered, we'll do our best to do that and post it on the CoP.

For now, though, I would like to thank Andra and Sharon and Melissa and all the teams that were part of the cohort and all of you for participating today. Really appreciate your time and your effort, and we look forward to keeping this whole conversation going. So thank you all, and, Christine – I think, Christine, are you off? Yeah. Christine Quinn, our champion on this, had to jump off.

So thanks to her as well but thank you all and have a great day.

(END)