THE PENNSYLVANIA WORKFORCE INVESTMENT BOARD

The Strategic Industry Partnership Toolkit

A Toolkit for Effective Industry Partnership Management

2009

FINAL

Dear Reader:

The Pennsylvania Workforce Investment Board believes that this toolkit will not only assist Industry Partnerships in demonstrating that the activities conducted by them have addressed Industry needs, but also will improve the way Industry Partnerships work. This toolkit supports the use of a Strategic Industry Partnership Framework. This approach should be rigorous in its efforts to determine the worth of a program and to guide program implementation and management, as well as relevant and useful to program coordinators. Although the Strategic Industry Partnership Framework is useful to document impact and demonstrate accountability, it should also lead to more effective programs, greater learning opportunities, and better knowledge of what works.

This Strategic Industry Partnership Toolkit is designed to encourage dialogue about the role assessment, capacity building, planning, implementation, and evaluation should play within an Industry Partnership. We encourage you to think differently about these processes, so that together we can move the discipline from a stand-alone monitoring process to an integrated and valuable part of program planning and delivery.

This document includes several methods, best practices, and ideal ways to incorporate this framework into your partnership. Although these are examples for your use, the core practices demonstrated in this toolkit are reflected of ideal components and measures used during the grant evaluation and technical assistance process.

We hope that you will find this information valuable. At the very least, it should provide a solid base from which to make decisions that ultimately lead to stronger partnerships and a more effective workforce development system.

Sincerely,

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The Strategic Industry Partnership Framework

The Strategic Industry Partnership Framework is a project management approach used to develop the infrastructure for effective and sustainable Industry Partnerships. Each stage builds upon another, and the entire process is built around the core concepts of Industry Partnerships.

Step 1 – Industry Analysis The collection and review of data from many sources to define the industry sectors challenges, resources already in place to address them and additional resources that are needed to address employer, employee, and overall industry need. The data collected should help you to make more informed decisions about your program objectives. The sequence of actions in the assessment phase includes 1) collect data to identify current Industry Partnership needs, 2) identify available resources to address the identified needs, 3) analyze the data, and 4) prioritize Industry Partnership needs.

Step 2 – Capacity Building To build capacity, the Industry Partnership must engage stakeholders to develop and strengthen the Industry Partnership. The main elements of capacity building are 1) identify capacity to address prioritized problems, 2) mobilize Industry Partnership membership capacity, 3) reach out to new partners and 4) nurture members of the Industry Partnership.

Step 3 – Planning During the planning stage, the Industry Partnership sets goals and measurable outcomes as part of a plan to address the needs identified during the analysis phase. The planning phase includes 1) identify specific goals, 2) identify and prioritize objectives, and 3) develop an implementation plan.

Step 4 – Implementation This stage involves putting the plan into action with evidence-based strategies that were identified in the planning stage. It also means documenting and measuring how the plan is carried out and how well it works, making course corrections as needed and finalizing the evaluation plan. The basic elements of this step include 1) carry out planned services, 2) document what is done and 3) evaluate the implementation process.

Step 5 – Evaluation/Business Impact During this stage, the Industry Partnership measures what has been done and the effects it has had on the industry, employees, employers, the regional workforce development system and other key stakeholders. Evaluation findings tell us how programs, policies or practices might be improved to achieve better outcomes. Key activities under evaluation include 1) implement the evaluation plan, 2) collect data, 3) analyze data, 4) report outcomes to create a common understanding of what the numbers mean and 5) use the evaluation outcomes to make needed changes in programs, activities and services.

Milestones in Industry Partnership Development

While timelines will vary by Industry Partnerships, the objective is to build an infrastructure and engage industry representatives in development of deliverables consistent with key steps in the strategic industry partnership framework. The steps defined below are meant to build on each other and should be re-evaluated on an ongoing basis. Nevertheless, each Industry Partnerships should assure that the following process takes place consistently within the Industry Partnership.

Strategic Strategy	Milestones	Outcomes
Step 1 Analysis	• Conduct Regional Industry Cluster Analysis • Conduct employer/employee/industry needs assessment • Analyze data • Develop goal statements	• Prioritize Regional Targeted Industry Clusters • Industry demanded/needed strategies, policies, programs & practices • Report outcomes of needs assessment • Create clear, concise, data-driven goal statements
Step 2 Capacity Building	• Identify who will serve in the capacity as a coordinator/facilitator • Create and develop new partnerships • Engage existing members in assuming leadership roles • Identify "missing" stakeholders • Recruit & develop leadership within the Industry Partnership	• Establish support for coordination and facilitation • Membership directory • Membership recruiting plan • Stakeholders decide and understand roles and responsibilities • Leadership development plans • Industry representation on Governance structure
Step 3 Planning	• Review industry driven needs • Conduct planning & strategy meetings • Create action & evaluation plans	• Action Plan • Measurable outcome objectives • Evaluation plan
Step 4 Implementation & Sustainability	• Implement industry-driven plans • Develop & implement sustainability plan	• Post implementation program / process evaluation • Sustainability plan • Industry and other stakeholders have sustained engagement in Partnership governance and activity
Step 5 Evaluation	• Review initial outcomes with Industry Partnership members • Review & use process data to assess implementation and develop future recommendations	• Evaluation reports for internal & external audiences • Recommendations to improve program delivery

Overall Industry Partnership Recommendations

Listed below are recommendations and suggestions on how to achieve a highly functioning Industry Partnership. We recognize that Industry Partnerships reserve the right to determine the most effective means to conduct program improvement processes, engage partners, and enhance the overall effectiveness of the Industry Partnership.

Do This	Don't Do This
Identify and collect data to get a more complete & accurate understanding of Industry needs.	Use only the data you prepared in submitting an earlier grant proposal.
Recruit new faces and build your Industry Partnership	Form your partnership with the "usual" representatives.
Collaborate with a broad range of partners, including educational institutions at all levels, philanthropic community, community based organizations, PA CareerLinks, Regional Career Education Partnerships, DCED/WEDNet, Industrial Resource Centers, Ben Franklin Partners, Chamber of Commerce, and/or Union of Labor Management Partnership.	Do it on your own.
Contact the Pennsylvania Workforce Investment Board for Technical Assistance.	Assume that your Industry Partnership has all the knowledge and skills it needs.
Use already developed, tested materials for assessment and outcomes	Don't reinvent the wheel; should relevant and effective materials already exist.
Use evidence-based strategies and best practices in conducting program management initiatives	Do it on your own.

INDUSTRY PARTNERSHIP DATA ANALYSIS

The formation of Industry Partnerships commonly results from the data-driven concept of Industry Cluster analysis that defines targeted industries and occupations. A regional labor market analysis should be conducted and routinely re-evaluated to ensure the targeted industry cluster and occupations are supported by data and validated by demand.

As Partnerships are developed and sustained, a needs assessment is an approach to gathering data to identify problems, set priorities and make decisions to address the problems. Industry Partnerships need to invest time in collecting local/regional data to inform future program development, as well as identifying current industry needs.

An Industry Partnership needs assessment defines and describes the: 1) the broad needs and challenges facing the industry as a whole, 2) infrastructure and skill needs of employers, 3) infrastructure and skill needs of employees 4) current resources/services available, and 5) additional information and resources needed to address gaps in the understanding of the industry.

End products of the needs assessment include:

- Analysis of gaps in training programs, infrastructure, resources and services at baseline
- Data-driven or fact based goal statements
- Partnership data analysis for inclusion in reports to the Partnerships' funders.
- Baseline data for continued assessments, capacity building, and planning

Why is a Needs Assessment Important?

- Not all Industry Partnership members are alike – in available resources, or in the needs of members
- A more complete understanding of the industry as whole is critical to projecting future programming needs and services. This type of understanding can be achieved when data from many sources are collected, examined and interpreted through the lens of a large cross-section of the industry.
- Thinking big – identifying problems beyond the needs of one company or entity, at an industry level, helps build big solutions and strengthens the industries in regions with a competitive advantage.

DATA COLLECTION

Baseline Needs Assessment

If you do not take measurements when a fiscal year starts it is hard to prove months or years later that a change or impact has taken place. All Industry Partnerships need to conduct a needs assessment at baseline, prior to initiating training activities.

An Effective Needs Assessment

- Is conducted in the first few months of a fiscal year and is administered in an organized and coordinated fashion
- Involves the professionals at the Center for Workforce Infromation and Analysis (CWIA) at the PA Department of Labor & Industry
- Includes Industry Partnership members that employ individuals in a variety of settings
- Is done in the best means to achieve results. Paper, online survey engines, focus groups, roundtable discussions, or a combination of methods.
- Determines the best means for meeting Industry Partnership membership needs
- Includes perceptions (anecdotal data) as well as statistical information on needs
- Is used to set the Industry Partnerships priorities
- Addresses the following:
    - Understanding the human capital needs and critical challenges facing the industry. External industry trends often translate into employee/employer needs.
    - Employer/employee identified training needs including skill gaps critical to competitiveness and innovation.
    - Identify logistical and/or infrastructural barriers to meeting goals and objectives.

Setting Priorities

Priority setting can be done through a general discussion that results in a consensus or through a more systematic, multiple voting processes. In a multiple voting process all members spread a set number (3) of "votes" individually across a list of needs or invest two or more votes on a single issue. When this method is used, the needs receiving the highest number of votes become the priorities.

Guidelines for Data Collection

Do This	Don't Do This
Be mindful of your audience. If appropriate, use a fifth grade reading level clear and concise language on survey materials. Know when and where technical jargon is appropriate.	Underestimate the importance of language barriers, both literacy and limited English proficiency, in the development and interpretation of survey results.
Collect information from a large sample size.	Interview only those present at the time of data collection – or people who just happen to be easy to reach.
Utilize Industry Partnership members with the given expertise to interpret findings.	Use only paid staff and traditional agency partners to collect and make sense of data.
Before administering the survey, tell people why you are collecting the information and how it will be used.	Pre-determine training needs without adequately assessing Industry needs.
Supplement existing data with new information as new problems are identified.	Rely solely on the data collected to address emerging problems.

Capacity Building

Capacity building is the second step in the Strategic Industry Partnership Framework. Capacity building involves identifying and increasing membership along with increasing the ability and skills of individuals, employers and organizations to work together to address problems identified during the analysis stage.

The Industry Partnership becomes the operational structure for change. It is the intersection of many stakeholders – individuals and organizations with multiple interests – around a common concern of building a skilled workforce. Members can serve in many capacities that create measurable results and mobilize resources to support programs.

What Industry Partnerships Need to Build

Building an Industry Partnership takes time. Successful partnerships organize for success, emphasize the growth and development of the Industry Partnership, and create an infrastructure that is wide enough and deep enough to make a real difference.

Effective Industry Partnerships build and maintain:

- Organizational Structure
- Membership and participation
- Industry Partnership Leadership and Governance Structure

Industry Partnership Organizational Structure

The level of organization depends on an Industry Partnership's goals – what the Industry Partnership has to start with and what it intends to accomplish over the course of funding.

Most Industry Partnerships develop an organizational infrastructure that includes:

- Industry Partnership Objectives including Mission, Vision and Goal Statements

  Written Industry Partnership objectives are needed – these should be shared among the membership. The objectives do not need to be highly technical but it is important to create a common vision to help move the Industry Partnership in the direction it wants to go.

- Governance Principles – Membership Expectations

  Industry Partnerships should draft written expectations for both the membership and those that assume roles on the governance structure. These should be foundational expectations that must be fulfilled in order to effectively perform the responsibilities as an Industry Partnership. In doing so, it serves as an explicit reminder and reinforcement of the commitment of members to the activities of the Industry Partnership, clearly identifies what is expected of Industry Partnership members in order to benefit from the offerings of an Industry Partnership, and sets the criteria for periodically assessing the performance of individual members.

- Governance Structure –

  Industry Partnerships that engage the membership in the governance process are highly successful and in doing so, the Industry Partnership remains industry-led and demand driven. An ideal governance structure is reflective of the membership and the majority of representation includes employers and worker representatives where appropriate. This governance structure can take form as an advisory council, steering committee, executive committee, officers or other entities as deemed appropriate by the Industry Partnership. The function of the group is to balance and align the needs, interests, and expectations of the membership. It is expected that individuals comprising this group will take the lead in conducting Industry Partnership meetings. All members should clearly understand their roles and responsibilities throughout the governance process.

Membership and Participation

The strength and success of an Industry Partnership directly depends on the skills, resources and commitment of its members. Membership recruitment and stakeholder engagement should be an ongoing process. This means getting the right people involved from the beginning. It means treating everyone as an equal partner and giving each person a voice in the partnership. It also means that there must be an ongoing effort by all partners to identify, contact, orient and bring new members into the Industry Partnership

Key to this process is developing an effective communications system. An effective communication system includes

1. Identify key and appropriate stakeholders to serve as the primary points of contact within the coordination and facilitation role.
2. Establish relevant and effective communication channels, including:
   a. Meetings
      i. Schedule meetings in advance
      ii. Distribute meeting agenda in advance of meeting
      iii. Prepare and distribute brief notes or minutes on all meetings. Sharing meeting notes or minutes with potential members provides a history of where the group has been and helps orient new members.
   b. Technical Assistance and Support
      i. Establish relationships and networks within the Partnership that can provide support and assistance to the Partnership and its members
      ii. Establish relationships and networks external to the Partnership that can provide support and assistance to the Partnership and its members

Industry Partnerships naturally build membership and promote participation when they meet the needs of their members. Following are six principles that can be used to nurture and engage members.

Six “Rs”of Membership Building	Tips for Membership Building
Recognition	Give credit and praise and recognize members for their contribution to the Industry Partnership
Respect	Respect member schedules. Schedule meetings in advance and be sensitive to individual’s time
Role	Create roles with real power and substance – not just token slots on a committee
Relationship	Personal contact encourages people to join a group, Provide opportunities for people to share best practices and to network
Reward	People will join in when the rewards of membership outweigh the costs, Provide opportunities to share resources and discuss mutual challenges
Results	People tend to stay involved when their involvement makes a difference – when visible projects and activities make an impact

Planning

Planning is the third step in the Strategic Industry Partnership Framework. During the planning stage, an Industry Partnership develops an action plan also known as an implementation plan. An action plan outlines how an Industry Partnership will pursue activities in order to achieve the identified goals. Action plans describe when and how to implement activities. The activities should always logically link to industry identified problems and be demand driven and data-supported.

Identify Goals

The completion of a needs assessment should result in data that defines industry specific workforce needs. The results of the needs assessment should be formulated into interventions or specific goals that address the areas of concerns. Once an Industry Partnership has clearly identified and developed specific goals an Industry Partnership can begin the implementation phase.

Action Plans

Action plans, also called implementation plans, are specific plans that are typically written to cover a one-year period of activity. Action plans translate long-range strategic plans into manageable projects that achieve intended outcomes. Written action plans should be shared with all members of the Industry Partnership and answer the following questions:

- What activity, action, or training will take place?
- How is the activity/action/training to take place?
- By when will the action take place?
- What resources will be needed to carry out these actions?
- Who needs to be informed that the activity, action, or training will occur?

An action plan should be developed before executing any program and updated periodically to reflect changes in the plan.

Quick Tips: Guidelines for Planning

Do This	Don't Do This
Keep the Industry Partnership focused on industry related workforce needs CORRECT SEQUENCE: Problem → Intended Outcomes → Strategies → Activities	Immediately involve the Industry Partnership in conducting activities that may or may not be related industry needs INCORRECT SEQUENCE: Activities → Strategies → Problem → Outcome
Be inclusive – seek out key stakeholders with diverse viewpoints to identify and address common workforce needs	Involve only a few stakeholders who support outdated strategies to develop the action plan
Provide Industry Partnership members with background on the planning process before participating in developing an action plan	Assume that everyone has prepared an action plan and understands what they need to produce and why it is important to do one
Be efficient – Send out an agenda in advance of the meeting. Define what needs to be accomplished and in what time frame. Start and end meetings on time	Surprise Industry Partnership members with an agenda when they arrive Don't give them time to think about the issues and what they can contribute to the discussion before arriving
Communicate accomplishments – Structure every meeting so that it results in a "product", a list of ideas Show off the product at the end of the meeting Distribute copies of products & key decisions made to all Industry Partnership members in the form of meeting minutes	Leave the meeting on a "low note," knowing that little has been accomplished Assume that "products" need only to be completed not recognized and used.

Implementing Effective Industry Partnership Programs and Activities: Sustainability

Implementation is the fourth stage in the Strategic Industry Partnership Framework after assessment, capacity building and planning. Industry Partnerships “turn the corner” when they detail what needs to be done, figure out who does what, when and where and “do the work.” Carrying out and documenting delivery of planned services, improving and sustaining characterize the implementation stage as Industry Partnership members’ step forward to carry out and oversee different parts of the work.

Engaging members in ongoing quality improvement during implementation helps coordinate activities as well as create a shared responsibility for success. This guide describes a continuous quality improvement process for implementing activities. It requires wide distribution of implementation plans, conducting the program, documenting variations from the plan, assessing progress toward goals and modifying program activities to better achieve intended outcomes and meet Industry needs.

It is important to note the benefits of developing a sustainability plan. How well an Industry Partnership plans for sustainability determines whether the initiative and activities currently being conducted are a brief flash of light or whether it is an ongoing effort capable of achieving long-term goals—building a highly skilled workforce. Sustainability requires creating a plan dedicated to securing the resources to keep an Industry Partnership operational.

It is not just “what you plan to do” but rather “how well you do what you planned to do” that creates meaningful outcomes.

Document What Is Done

At this stage the Industry Partnership moves from planning to oversight, mutual accountability and monitoring. During the planning stage the Industry Partnership identified specific goals and programs. They also developed detailed action or implementation plans around each goal. Activities and programs are only effective if they are fully implemented. Conducting activities described in the implementation plan needs to be paired with a thorough understanding of what happens when the intended program activities were implemented. Industry Partnerships should focus their attention on documenting how the activities, training, or program was actually implemented along with any changes that are made.

Process Evaluation for Continuous Quality Improvement

How well a program is delivered influences the ability of the Industry Partnership to achieve its goals. Process evaluation provides information to ensure Industry Partnership members get the most “mileage” out of their programs.

Process evaluation, sometimes called “implementation” evaluation, helps determine whether a program is being delivered as planned. A process evaluation might ask whether the number of people reached is more or less than expected, whether individuals reached are members of priority occupations, and whether the program is being delivered according to the planned protocol. Process evaluation provides information to the Industry Partnership to improve program delivery as well as to stakeholders who want to know about the level and quality of program activity.

Improving the Way We Work

Aside from documenting what is actually” done”, process evaluations help staff and planners improve program delivery and enhance outcomes. When used for this purpose process evaluation becomes part of a continuous quality improvement cycle.

A continuous quality improvement cycle begins with the development of action plans describing the ideal conditions and activities to be conducted, by whom, for whom, with what, when and how. As these activities unfold, Industry Partnerships should document the way in which these activities are actually conducted.

Several months into implementation, Industry Partnerships should assess progress toward short-term goals and compare each action plan to documentation of what actually was done and then revise their action plans to better align program activities with intended outcomes.

Facilitating Discussion of Mid-Course Changes

When delivering information on the progress of an Industry Partnership, frame the discussion in a manner that recognizes the work that has been done while at the same time maximizing future efforts to better reach your goals. By focusing on the positive you convey optimism about the prospect of success as well as the need to make adjustments to the plan.

The following questions can help guide a discussion on making mid-course changes to implementation plans.

- How much progress are we seeing toward our short term and intermediate outcome objectives?
- Which objectives are being met?
- Which program components are working well?
- Which program components are not showing progress?
- For the outcome objectives that are not showing progress, was each program activity completed as planned? Were deviations were made from the implementation plan?
- Was the staff trained/ qualified to conduct the program?
- How many people/organizations were exposed to each activity?
- What were participants’ perceptions of each activity? Of the program?
- What were the strengths of the way the program was implemented?
- What were the barriers or challenges to implementation?
- What was the nature of interactions between staff and participants?
- Where do improvements need to be made? What about changing:
  - Materials or Messages?
  - Training?
  - Outreach?
  - Organization?
  - Duration or frequency of the activity?
  - Delivery method or location?
- What needs to be done to more effectively implement key program components?
- What changes need to be made in the program or in the way we deliver it to improve its acceptability?

Sustainability

Building partnerships and leveraging resources are critical to not only promote a comprehensive approach, but also to achieve sustainability for Industry Partnership and Worker Training priorities. Securing the resources and support to accomplish the work of the Industry needs to begin immediately and continue throughout the life of the Industry Partnership.

How to Sustain the Work

It is never too early to think about how to broaden the Industry Partnerships impact and continue its work. Supported by public sector funding for relatively short time periods, Industry Partnerships need to act early to leverage additional resources that will allow it to continue to achieve its goals. Industry Partnerships should be continuously working on identifying and securing the resources to sustain their work.

Start the Process

Partnerships must address critical sustainability factors for both financial and organizational sustainability, including:

- Determine What Needs to be sustained.
- Establish strategy or strategies to develop and implement sustainability
- Define how does the IP know whether or not its sustainability strategies are working?
- Who/What partners should be at the table to help the IP sustain? Are those partners currently participating? If not, what outreach efforts need to take place to bring those partners to the table? If so, is the current structure working? What roles and outcomes need to be improved upon?

Financial Sustainability

Industry Partnerships must define what needs to be financially sustained to keep the program operational and then work to develop the necessary resources.

One of the first decisions an Industry Partnership will need to make is whether to pursue outside funding and/or identify resources within the Industry Partnership to sustain its work. Typically Industry Partnerships have decided to adopt practices that maximize resources within the Industry Partnership. However, other Industry Partnerships have pursued the pathway to external funding.

Partnerships should identify funding strategies and examine possible funding sources. There are various funding sources that support elements of the Industry Partnership strategy, including —

- Local or regional foundations
- Civic organizations
- Government agencies
- Professional organizations
- Private investment

Organizational Sustainability

Sustainability is not just about money. Sustainability is everything the Industry Partnership will need in order to achieve its goals including coordination and facilitation, space, time, technology and training. Addressing a number of critical areas, including organizational alignment and structure, governance, process and procedures, etc can develop organizational sustainability. Specific examples Industry Partnerships may undertake include:

> Define the goals, strategies or activities that need to continue in the short term (next 6 – 12 months) as well as the next five years? When defining what needs to be sustained, think beyond current Industry trends.
>
> Align the Industry Partnership with appropriate institutions for short and long-term structure and opportunities (ex. Local Workforce Investment Board, PA CareerLink, Trade associations, labor-management councils, non-profits, etc)
>
> Establish a governance structure that enables the Partnership to be industry-driven and action-oriented. (Steering Committee, sub-committees based on geography, interest areas, etc.)
>
> Develop process and procedures that allows stakeholders to clearly understand the roles and responsibilities, decision-making procedures, Partnership priorities and strategies, etc. (Memoranda of Understanding, contracts, strategic plan {including mission, vision & goals}, assessment and evaluation, clearly defined roles and responsibilities for employers, Workforce Investment Board, IP Managers, education, PA CareerLink, etc.)

Many Industry Partnerships have formal sustainability plans. Many of these are summarized as best practices and have been provided in the appendix for your use.

Quick Tips: Guidelines for Implementation & Sustainability

Do This	Don't Do This
• Work as a team to develop implementation plan for each goal	• Have Industry Partnership staff develop and distribute implementation plans
• Identify natural and strategic areas where Industry Partnerships can implement programs and activities	• Scatter program activities haphazardly around the region
• Have stakeholders review & modify the implementation plan before conducting the intervention.	• Go for expediency - create detailed implementation plans without consulting stakeholders.
• Monitor and record the way the program/activities are implemented in the region	• Assume that plans are always implemented the way they are described in "the plan"
• Prepare a sustainability plan that incorporates both financial and organizational components	• Assume that the resources will always be available to continue your work
• Review differences between the implementation plan and the way it is actually delivered. Identify and implement changes to improve program delivery	• Assume that no further action is needed once the program has been implemented and documented

Evaluation and Business Impact

Evaluation Basics

Evaluation is a formal process for collecting, analyzing, and interpreting information about the effectiveness of your Industry Partnership and your training programs. It is a tool used to assess the way a program is put into effect. Evaluation measures the outcomes of the program, its efficiency and impact over time.

Why Evaluate?

Evaluations are conducted for four main reasons:

- To improve the program or some aspect of the program
- To measure the program's effectiveness
- To demonstrate the effective use of resources
- To demonstrate accountability

Developing an Evaluation Plan

The first step in developing an evaluation plan is to clarify the purpose of the evaluation. The purpose will guide the development of a systematic plan, stating exactly what is to be evaluated.

The evaluation plan involves:

- Choosing the evaluation type and design
- Writing clear objectives to focus the evaluation
- Creating a timeline of tasks and resources to be used in the evaluation
- Collecting and interpreting data to determine whether the objectives have been met
- Reporting the results

Evaluation Types

There are three types of evaluation. Formative evaluation is used to test program plans, messages, materials and strategies during the development of the program and while the program is being implemented. Process evaluation occurs while the program is being implemented to determine if it is being delivered as planned. Outcome evaluation occurs after the program is completed and looks at the end results, or the outcomes of the program.

Formative evaluation is conducted during the development of the program to ensure that program materials, strategies, and activities are of the highest possible quality. Formative evaluation ensures that materials, strategies, and activities are feasible, appropriate, meaningful, acceptable and culturally appropriate for the program and its priority population. This type of evaluation should be used during development of a new program. Formative evaluation can also be used when an existing program is being adapted for use with a different priority population or in a new location or setting.

Typical Questions Answered by a Formative Evaluation

- Are the proposed activities industry demanded?
- Are the proposed plans and strategies likely to succeed?
- When is the best time to conduct the program?
- How much publicity is needed?
- Are sufficient resources to carry out the program available?
- Are the program hours and location acceptable?

Process evaluation, also called **implementation evaluation**, is a special type of formative evaluation. The purpose of process evaluation is to learn whether the program is being delivered as planned, for example, whether the number of people served is more or less than expected, whether the people served are members of the priority occupation, and whether the program is being delivered according to the intended plan or protocol. Process evaluation provides information about implementation to managers of the program, who can take action to assure program quality, and to stakeholders about the level and quality of program activity.

Typical Questions Answered by a Process Evaluation

- Was each program activity completed as planned?
- Was the staff qualified to conduct the program?
- To how many people/workplaces/organizations was each activity delivered?
- How many program announcements/materials were distributed?
- What were participants', workplaces' or organizations' perceptions of each program?
- What were the employers' perceptions of each program?
- What were the strengths of the way the program was implemented?
- What were the difficulties, barriers or challenges to implementation?
- Were all the resources needed for project activities available?
- What was the nature of the interaction between those conducting the training and participants?

Outcome evaluation (also called **summative evaluation**) assesses changes in individuals, organizations, or industries as a result of the Industry Partnership. In outcome evaluation, changes to the following outcomes are typically examined: attitudes, behaviors, knowledge, or skills. Such outcomes have been divided into short-term, intermediate and long-term outcomes, depending on when they occur relative to the program. Outcome evaluations are important for making major decisions about program continuation and future funding because they indicate whether the program is making a difference. A baseline measure of the outcome of interest is taken before the program has begun and compared to measures at follow-up. Follow-up could be immediately after the program or at a later time.

Typical Questions Answered by an Outcome Evaluation

- Was there a change in participants' knowledge or skills?
- Did the intervention impact wages?
- Did employers report a significant increase in productivity?
- Has the Industry Partnership contributed to high demand occupations?

Data Collection

Data collection is a central component of assessing the program's effectiveness and making decisions about the program's future. Data collection occurs after the goal of the program and the central questions have been identified.

Determine the Best Method for Collecting Data

After selecting the data sources or individuals to participate in the data collection, choose the data collection methods that will be the most appropriate for achieving the evaluation objectives. When collecting data, there will be many more decisions to make. The first of these is whether to use qualitative methods, quantitative methods, or both.

Qualitative methods are open-ended and allow the evaluator unlimited scope for probing the feelings, beliefs, and impressions of the people participating in the evaluation. They also allow the evaluator to judge the intensity of people's preference for one item or another. Such methods include individual interviews, observations, roundtable discussions, and focus groups.

Quantitative methods are ways of gathering objective data that can be expressed in numbers, for example, a count of people or the percentage of skill advancement. The results produced by quantitative methods can be used to draw conclusions about the priority population. Such methods include surveys/questionnaires administered directly to respondents' in-person, through the mail, web, e-mail, or through telephone.

Select Data Collection Instruments

Whether you decide to use an existing instrument or to develop your own, the instrument you use should:

- Include questions that can be used to measure the concepts addressed or affected by the training
- Be appropriate for your participants in terms of age or developmental level, language, and ease of use
- Be written in simple and easy-to-understand language
- Be relevant to the participants' experience

Establish Procedures for Collecting Data

To ensure that information will be collected in a consistent and systematic manner, a set of procedures for data collection should be established. Data collectors should be trained in using these procedures.

Data Interpretation

Once the data is collected, it must be analyzed and interpreted. In some cases data analysis and interpretation can be the most time-consuming tasks of the evaluation.

Data Analysis Steps

- **Step 1: Getting to know the data** requires a thorough review of all the pieces of data to become familiar with what you have at your disposal. For qualitative data, getting to know the data requires that you read and re-read responses play and re-play audio and video recordings of user responses, take notes about your thoughts and impressions, decipher which responses add value and which do not. For quantitative data it means running counts or frequencies, for each response, evaluating where missing responses occur, noting categories where small numbers are present and considering data issues such as rounding off, or use of percentages.

- **Step 2: Preparing and focusing the data** is the process of sifting through all data and putting it into an organized format. An important part of preparing the data is eliminating inappropriate or meaningless information, such as when a respondent chooses more than one option for an item on a survey (e.g., “strongly agree” and “agree”).

- **Step 3: Analyzing the data** includes a careful review of the responses to accurately interpret their meaning. Analysis is conducted differently for qualitative and quantitative data results.

  To analyze qualitative data, have several people read the transcripts, field notes, or documents to get an overall sense of the data. Note the common themes that arise related to each evaluation question, and note whether any important themes arise that are not related to the evaluation questions. Finally, reread the material, looking for details and patterns related to each common theme. Begin by asking questions such as:

  - What patterns and common themes emerge in responses to specific questions or items?
  - How do these patterns (or lack thereof) help to illuminate the broader evaluation question(s)?
  - Are there any deviations from these patterns? If yes, are there any factors that might explain these atypical responses?
  - Do any of these patterns or findings suggest that additional data may need to be collected?
  - Do any of the evaluation questions need to be revised?

For quantitative data, begin by describing the responding persons or organizations. In addition to giving the total number of survey respondents, also give the total number of respondents for each question asked. This is important, especially if some people didn't answer some questions so that the numbers differ from question to question. Consider reporting the range for each descriptive item, for example, the youngest participant was "18 years old" and the oldest was "67 years old." For questions answered on continuous scales (for example, 1=strongly agree; 5=strongly disagree) report the mean or average for each scale.

- **Step 4: Interpreting the data** involves revisiting the original evaluation questions. Once the data have been organized and carefully analyzed, it is time to draw conclusions. To determine if the evaluation questions about your program have been answered, the evaluator will need to:
  - Put the information in perspective by comparing the results with:
  - What was expected
  - The original goals of the program/training
    - Consider how the results can be formulated into recommendations to help improve the program, product or service
    - Draft some conclusions about program operations, or whether program goals were met, and use the evaluation data to support them
    - Record conclusions and recommendations in a report, and use the evaluation data to justify these conclusions or recommendations
- **Step 5: Selecting a data presentation format** requires that findings be presented in a way that will clearly communicate the results. Presentation formats for qualitative and quantitative data will be different. Qualitative data are presented using sample quotes. Quantitative data can be presented using charts, graphs, and tables. Be sure each of the following has been accomplished before analysis is complete:
  - Describe the sample that actually participated in the evaluation
  - List limitations of the data collected
  - Share the preliminary results with each of the stakeholders
  - Identify the most valid findings
  - Identify the most important findings for answering each evaluation question
  - Make sure each evaluation question was answered, and that the evaluation objective was met
  - Choose the best method of presentation for each finding
  - Discuss the "why" behind each of the findings with the stakeholders
  - Gather suggestions for "next steps" and other recommendations

Reporting the Results

Consider the audience when preparing the report. Generally there are two audiences with whom to share results: the internal audience and the external audience. The internal audience includes members of the Industry Partnership, program managers/coordinators, training venders, and other stakeholders. The external audience includes the PA General Assembly, Pennsylvania Workforce Investment Board and the Department of Labor and Industry. The timing, purpose, and format of the report will vary by the given target audience.

To help clarify the goal and objectives of the report, ask the following questions:

- Who is the audience? What are its needs and interests?
- What does the Industry Partnerships hope to get back from the audience?

Why Share Evaluation Findings with Different Groups?

Audience Type	Reasons for Sharing Report Findings
Internal Audience	
Industry Partnership Members	Guide decisions about program modifications and future needs
Local Workforce Investment Board	Influence regional workforce development policies and plans
Training Vendors	Collect input on the effectiveness of training programs
Industry Partnership Managers/Coordinators	Provide feedback on the job they are doing
Future Industry Partnership Members	Demonstrate the value of the program
External Audience	
PA General Assembly	Overall Accountability to the Taxpayers Affect future funding
Pennsylvania Workforce Investment Board	Create a “name” for your initiative to make it competitive for seeking additional resources Attract funding and in-kind resources from multiple sources
Other Industry Partnerships	Enable other Industry Partnerships to utilize existing sources and share best practices

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Industry Analysis

Needs Assessment

Example Industry Analysis/Needs Assessment

Name
Job Title **Organization**
Organization Address
City **State** **Zip Code**
Phone Number **Email Address**
What is the primary type of facility or organization that you represent? (Please check one)

- ☐ Acute Care Hospital
- ☐ Behavioral / Mental Health Facility
- ☐ Rehabilitation Facility
- ☐ Out Patient
- ☐ Other (Please Specify) ____________________________________
- ☐ Long Term Care
- ☐ Home Health Agency
- ☐ Sub Acute Care
- ☐ Supplemental Staffing Agency

Clinical Skills

What are the priority unmet clinical skill needs in your organization? (Rank your top 5)

- ☐ Advanced Physical Assessment
- ☐ Care of the Older Adult
- ☐ Emergency Preparedness
- ☐ Ergonomics
- ☐ Fall Prevention
- ☐ Fluid Electrolyte Balance
- ☐ Infection Control
- ☐ Medical Terminology
- ☐ Pain and Symptom Management
- ☐ Palliative Care
- ☐ Pharmacological Update
- ☐ Phlebotomy
- ☐ Skin/Would Care
- ☐ Spanish for the Healthcare Provider
- ☐ Specialized Nurse Aide Training
- ☐ Other (Please Specify) _______________

What are barriers / challenges to educating the healthcare workforce in these clinical abilities? (Choose all that apply)

- ☐ Funding
- ☐ Time
- ☐ Curriculum Creation
- ☐ Educator Availability
- ☐ Other (Please Specify) ____________

Specialty Certification Programs for Nursing

In which of the following areas would you like to certify more nurses for your organization? (Rank your top 5)

- ☐ Ambulatory Care Nursing
- ☐ Cardiac Rehabilitation Nurse
- ☐ Cardiac Vascular Nurse
- ☐ Case Management Nurse
- ☐ College Health Nurse
- ☐ Community Health Nurse
- ☐ Gerontological Nurse
- ☐ High-Risk Perinatal Nurse
- ☐ Home Health Nurse
- ☐ Informatics Nurse
- ☐ Infusion
- ☐ Maternal-Child Nurse
- ☐ Medical-Surgical Nurse
- ☐ Nurse Executive
- ☐ Nursing Professional Development
- ☐ Oncology
- ☐ Pain Management
- ☐ Pediatric Nurse
- ☐ Perinatal Nurse
- ☐ Psychiatric & Mental Health Nurse
- ☐ School Nurse

What are barriers / challenges to certifying the healthcare workforce? (Choose all that apply)

- ☐ Funding
- ☐ Time
- ☐ Curriculum Creation
- ☐ Educator Availability
- ☐ Other (Please Specify) ___________

Management and Leadership

In which of the following areas are development needed for your managerial workers? (Rank your top 5)

- ☐ Building a Retention Culture
- ☐ Charge Nurse Training
- ☐ Cultural Diversity Skills
- ☐ Crucial Conversation
- ☐ Effective Mentoring
- ☐ Human Resources Best Practices
- ☐ Leadership for the Healthcare Provider
- ☐ Preceptor Development
- ☐ Supervisory Skills for the Frontline Supervisor
- ☐ Supervisory Skills for the Middle and Upper Manager
- ☐ Other (Please Specify) _______________

What are barriers / challenges to educating the healthcare workforce in these clinical abilities? (Choose all that apply)

- ☐ Funding
- ☐ Time
- ☐ Curriculum Creation
- ☐ Educator Availability
- ☐ Other (Please Specify) _________

Bioethics/Legal/Regulatory

In what areas does your staff need more training? (Rank your top 3)

- ☐ Accurate Documentation Confidentiality Issues in Healthcare
- ☐ Computer Training
- ☐ Customer Service
- ☐ Delegation
- ☐ Electronic Medical Records; Healthcare Informatics
- ☐ Legal and Medical Ethics for the Healthcare Worker
- ☐ Preventing Medication Errors
- ☐ Other (Please Specify) _____

What are the barriers/challenges with certifying nurses in these specialty programs?

- ☐ Funding
- ☐ Time
- ☐ Curriculum Creation
- ☐ Educator Availability
- ☐ Other (Please Specify) _________

Career Ladder Advancement / Entry Into Practice

Does your institution offer employees financial assistance through tuition reimbursement or other educational financial support?

- ☐ Yes
- ☐ No

Needs Assessment

What are the emerging challenges influencing the current healthcare industry in your region? (i.e. the emerging electronic health care record)

Are there any future job responsibility changes that would require your healthcare staff to complete additional training (such as: RN requiring BSN in five years)?

What is the impact, if any, on the healthcare system as the result of shortages in the healthcare workforce?

- ☐ More overtime
- ☐ Unfilled positions
- ☐ Less desirable shifts
- ☐ Reduced Services
- ☐ Other (Please Specify) ____________

Recruitment and Retention

For each of the statements below, please rate how strongly you agree or disagree that the following are barriers or challenges to recruiting and / or retaining a robust healthcare workforce:

	Big Challenge	Some Challenge	No Challenge
Failure to recognize or offer recognition incentives for healthcare staff	❑	❑	❑
Failure of supervisor to empower or recognize staff that would be successful in assuming leadership or committee roles	❑	❑	❑
Mandatory overtime	❑	❑	❑
Generational differences among a more diversified staff	❑	❑	❑
Lack of understanding of cultural diversity	❑	❑	❑
English as a second language workers	❑	❑	❑
Work / life balance issues	❑	❑	❑
Compensation	❑	❑	❑

What specialty areas are most difficult to recruit and retain? (Rank your top 5)

- ☐ Cardiovascular Technologists and Technicians
- ☐ Emergency Medical Technicians and Paramedics
- ☐ Home Health Aide
- ☐ Insurance Billing and Coding
- ☐ Medical and Clinical Laboratory Technicians / Technologists
- ☐ Medical and Health Services Managers
- ☐ Medical Appliance Technicians
- ☐ Medical Assistants
- ☐ Medical Records and Health Information Technicians
- ☐ Medical Secretaries
- ☐ Medical Transcriptionists
- ☐ Nursing Assistant / Patient Care Techs
- ☐ Pharmacists
- ☐ Pharmacy Technicians
- ☐ Phlebotomists
- ☐ Physical Therapists
- ☐ Physical Therapists Assistants
- ☐ Radiologic Technologists / Technicians
- ☐ Respiratory Therapists
- ☐ Surgical Technologists
- ☐ Other (Please Specify) _______________

Contact: Southeast PA Health Care Industry Partnership, Angelica Haines, Philadelphia Workforce Investment Board, 215-717-2010, ahaines@pwib.org

Capacity Building

Organizational Structure

Industry Partnership Objectives: Mission, Vision, Goal Statements

Mission Statement

The mission of the Tri-County Manufacturing Consortia is to identify and address the needs of participating manufacturers by developing strong partnerships within the consortia that include county and state organizations and educational providers in order to promote and grow the industry and to develop its workforce.

Vision

The Consortia's vision is to foster more effective collaboration, training, and cost savings for the manufacturing industry in the region in order to promote the growth of the industry and the local community.

Values

Collaboration
Dedication
Integrity
Lifelong Learning
Participation within the Community
Quality Products
Sharing

Goal 1 Increase the awareness of opportunities, image, and contribution to the local economy of the manufacturing industry

Objective 1 - Create marketing campaign plan involving newspapers, radio, Internet, brochures, billboards, television/video

Timeframe: Fall 2007
Ongoing

Objective 2 - Implement marketing campaign

Timeframe: Spring 2007 for television/video
Fall 2007 for newspapers, radio, Internet
Spring 2008 for billboards
Ongoing

Objective 3 - Develop clear career pathways within the industry to illustrate opportunities in manufacturing

Timeframe: Spring 2008

Objective 4 - Participate in CareerLink job fairs, career fairs, cultural events, mall and events

Timeframe: Fall 2007 and ongoing

Performance Indicators:

Development of marketing plan
Increase number of newspaper articles about the manufacturing industry by 5% a year
Increase in the number of applicants for manufacturing positions
10% increase in participation of consortia members in community events

Contact: Tri County Manufacturing Consortia, Mary Salony, Tri-County Workforce Investment Board, 724-282-9341 ext 35, msalony@tcwib.net

Governance Structure

Industry Partnership Governance – Example 1

The IP is governed by a steering committee, comprised of stakeholders that receive training funds, as well as partnership funds. The group provides industry expertise that is critical to meeting the needs of employers and unions within the industry. They assist with marketing and recruiting efforts, develop curriculum and career pathways, and provide skills upgrading to incumbent workers. All training and outreach plans are created based on recommendations and guidance from this steering committee. The committee, which meets several times a year, includes employers, unions, education providers, industry associations, and other groups that are involved in workforce development. The IP coordinator, who is the point of contact and facilitator for all partnership activities, coordinates the day-to-day activities. The local WIB acts as the fiscal agent and lead applicant for this IP.

The IP uses an informal structure to gather pertinent information and implement the goals set forth by the steering committee. The IP coordinator relies mostly on individual and small group meetings to provide assistance and to appropriately disseminate funding and organize partnership activities. The local WIB director remains closely involved in the decision-making process and also helps to identify appropriate streams of funding. ***Contact: Westmoreland-Fayette Building & Construction IP, Bill Thompson, Westmoreland-Fayette Workforce Investment Board725-755-2145, wthompson@westfaywib.org***

Industry Partnership Governance – Example 2

The Industry Partnership has organized its governance structure where a Stakeholder Committee (consisting primarily of representatives of the organizations that sponsor the Partnership) commits itself to the sustainability of the group while a Steering Committee (comprised of industry representatives) oversees the programming of the Partnership. This structure provides a clear delineation of responsibility that allows the project to be industry-led and stay on task while a team of administrators tends to the resource allocation and paperwork that goes with it. Specifically, the Partnership has a clear rule that members of the Stakeholder Committee do not attend the meetings of the Steering Committee.

The Project Manager provides the linkage between the two Committees. (S)he is responsible to the Stakeholder Committee for the outcomes of the group. At the same time, the Project Manager also works, more generally, with all of the companies in the Partnership and, more specifically, with the Steering Committee in putting together the shared training curriculum of the Partnership each year based on company needs. The Project Manager;

- Facilitate individual company assessments of their training needs annually;
- Bring the individual plans together into a tally of shared training needs;
- Affirm the identified needs with the membership;
- Secure the vendors;
- Organize the training schedule for the program year;
- Collect required data:
- Complete the required monthly reports;
- Meet with other Project Managers every 6-8 weeks.

Most Project Managers are contractors and have other businesses. The Local Workforce Investment Board (LWIB) has been careful to hire people who are not training vendors and, therefore, have no inherent conflicts of interest. The Project Manager is viewed as an extension of the WIB role as an independent, third party broker that works on behalf of industry but has no financial interest in the transaction. The LWIB hires people who are subject matter experts and/or persons with extensive project management backgrounds. For the most part, vendors are not members of Committees but may be invited to attend Steering Committee meetings especially when curriculum for the year ahead is being developed. ***Contact: Lancaster County Industry Partnerships, Scott Sheely, Lancaster County Workforce Investment Board, 717-735-0333, ssheely@dejazzd.com***

Governance – Multicounty Partnerships

The Industry Partnership consists of four (4) county- based consortia along with independent employers from the two counties currently without consortiums. The chairs/co-chairs of the local consortiums are members of a regional partnership steering committee. The membership also includes the local consortium coordinators who represent economic development, PA CareerLink and education. There is a formal alignment to the Local Workforce Investment Board through the LWIB's business services development office as well as fiscal department since any grant opportunities are managed at the LWIB level

The local consortia operate indendently to support local initiatives dealing with business/workforce development. The regional steering committee acts a clearinghouse and approval authority for training grants and communications with other regional workforce development entities when an idea, project, or issue is deemed to have regional merit and could benefit from a joint effort between consortiums.

The employers make the decisions in all aspects of the partnership. Formal needs assessments identify target areas for partnership attention. In the case of training, employers identify and prioritize areas for training and identify qualified providers to deliever training. The coordinators then gather information on pricing, availablity, and scheduling. In the case of Industry Partnership Worker Training funds, post decision, the LWIB contracts with the provider for the training. Locally, the coordinators are helping arrange other training with employers that can be funded through WEDnet. Employers recommend guest speakers and other development agencies as well as private service providers that coordinators then include in meeting agendas. ***Contact: Southern Alleghenies Manufacturing Industry Partnership, Marty Culp, Southern Alleghenies Workforce Investment Board, 814-949-6526, Culp@sapdc.org***

Governance – Using Committees

The Industry Partnership has a governance structure that holistically promotes talent development. Each Committee provides direction and scope that "blends" the course of work and action. The committees identify goals, put objectives in motion and conduct future planning. The following committees comprise the governance structure:

Executive Committee: Overall governance and administrative guidance
Business Advisory Committee: Practical guidance on current status of the industry and forecasting for talent development planning
Human Capital Committee: Works within the context of the initial GAP Analysis to ensure that programs/curriculum is being developed in accordance with established goals and objectives.
Sustainability Committee: Determining the course of action for on-going workforce/economic planning.

Contact: Wall Street West, LucyAnn Vierling, Lackawanna County Workforce Investment Board, 570-342-3653, lvierling.lcwib@verizon.net

Governance – Organized by Sub-cluster/Sub-groups

The Industry Partnership is represented by a Steering Committee that consists of two representatives from a variety of industry sub-clusters/sub-groups, including printing, electronics, original equipment manufacturers', apprenticeship, labor-management and maintenance. Since the need for a regional Partnership was identified, the Partnership's organizational structure was developed in view of the fact that the subclusters/subgroups originated prior to the "regional" partnership. Governance processes, decision-making, and administrative oversight is developed at the Steering Committee level, while training priorities and other locally-impacted decisions are made at the sub-cluster/subgroup level. The current structure promotes the identity and existence of the original sub-cluster as it continues to enhance a regional representation with Steering Committee action and planning. ***Contact: SCPA Advanced Materials & Diversified Manufacturing Industry Partnership, Hilary Thomas, South Central Workforce Investment Board, 717-920-7093, hthomas@wibpa.org***

Governance – Industry Specific Interest Committees

The Industry Partnership has a Steering Committee, made up of employers, labor, educators, and community-based organizations that represent multiple facets of the industry. The Steering Committee is charged with the overall decision-making and oversight of Partnership activities, including planning and budgetary control over Partnership and Worker Training activities. Industry representatives are provided with primary voting rights on Steering Committee decisions while additional stakeholders contribute their expertise. Ad-hoc committees are developed according to industry specific focus areas, including allied health, older worker initiatives, direct care workers, retention, recruitment & promotion of health careers, etc. The interest area ad-hocs contribute to the engagement level of the employers and other stakeholders and adjust accordingly. The IP Coordinator oversees the progress of the ad-hocs, maintains alignment and communication channels, and also serves as the intermediary between the Partnership and the Local Workforce Investment Board. ***Contact: SCPA Healthcare Industry Partnership, Hilary Thomas, South Central Workforce Investment Board, 717-920-7093, hthomas@wibpa.org***

Membership & Participation

Charter Agreement

This Industry Partnership has been incorporated as a nonprofit organization and has 501 (c) 3 status. It operates by by-laws or a Charter Agreement. The Charter Agreement can be found below.

Butler County Health Care Consortium: Charter Agreement

The Butler County Health Care Consortium's mission is to collaboratively identify training needs, to arrange for training, and to promote health careers to youth and job seekers. The Consortium serves as an opportunity for employers, educational institutions, and resource partners to network, share resources, and strengthen the community of health care providers.

The signer below, representing a Member organization, certifies the following:

- The Member's organization is based in Pennsylvania or maintains a significantly presence in the Commonwealth.
- The Member agrees to participate in no less than six (6) meetings of the Consortium per year.
- The Member will complete a survey assessing critical training needs of incumbent workers in the Member's organization.
- The Member will collaborate with other members to plan training that meets the needs of incumbent workers. Planning training includes identifying trainers, developing curricula for the selected audience, evaluating the training, and financing the training.
- The Member agrees to periodically measure the Consortium's progress against performance criteria established by the Pennsylvania Workforce Investment Board and its local office, the Tri-Country workforce Investment Board.
- The Member will participate in outreach activities to attract youth and job seekers to careers in health care. These activities include mentoring, serving as a job shadowing site, speaking to student groups, and representing the Member's organization or the Consortium at events such a career and job fairs.

By my signature, I certify my and my organization's intent to comply with the above stipulations. I understand that this agreement replaces all previous agreements and that it will be in effect until it is expressly revoked.

Signature	Date
Print, Name	Member Organization

Contact: Tri County Health Care Consortia, Mary Salony, Tri-County Workforce Investment Board, 724-282-9341 ext 35, msalony@tcwib.net

Employer Membership Application

Southeast Pennsylvania Logistics & Transportation Industry Partnership

EMPLOYER MEMBERSHIP APPLICATION

Date of Application: ______________________________

COMPANY INFORMATION	
Company Name	
Company Address	
Phone	
IP Contact Person/Title	
IP Contact Email	
FEIN Number*	

***can be obtained from the accounting department**

EMPLOYEE INFORMATION	
Number of full time employees (SE PA Locations Only)?	
Number of full time employees in Logistics & Transportation (SE PA Locations Only)?	
Are your employees union members (SE PA location only)?* **	

****if yes, please indicate which Union :** ______________________________

****if yes, please indicate union rep including contact information:** ______________________________

Do you presently offer employee training? ______YES _____ NO

What kind of training do you offer?

How did you hear about the Logistics & Transportation Industry Partnership?

	YES	NO
Please indicate committee of interest: Steering, Membership, Pipeline, or Training		
Have you ever worked with PA CareerLink?		
Do you offer Internships or Apprenticeships?		
Do you have Human Resource needs?		

What kind of training would you like to offer your employees?

What positions do you have available?

Contact: Southeast PA Logistics & Transportation Industry Partnership, Angelica Haines, Philadelphia Workforce Investment Board, 215-717-2010, ahaines@pwib.org

Memorandum of Understanding

COMPETE Industry Partnership
Memorandum of Understanding
DATE __________

The COMPETE training initiative is designed specifically to support development in the areas of application of complex technologies, increased pace of product innovation/market expansion and process improvement. Our assessment of your organization, as well as our mutual discussions, indicate that _____________ (company name) is a candidate for participation in the COMPETE program. Subsidized training is available to those organizations willing to commit financial support and employee time to implementing an appropriate training plan and associated schedule.

Through grant subsidies, selected companies are eligible to receive direct advanced training valued at about twice the company's investment. State subsidies will also provide resources to identify, survey and interview companies, prescribe appropriate areas of intervention, plan appropriate training and coordinate delivery and payment of appropriate training with qualified training vendors. There is no dollar amount set aside for each company or employee nor is there a specific limit although discretion will be used in distributing training subsidies.

There are two types of training intervention, company focused and career focused.
A. With company focused, the concept is to 1. Learn about the company's areas of challenge or opportunity to improve competitiveness, 2. Identify individuals within the company who have the most impact on the challenge or opportunity and 3. Direct prescriptive training to those particular employees based on that which will address the identified issues.

B. With career focused, the intervention includes all the services of company focused, but adds to it, the opportunity for an individual within a company (as identified by the employer) to participate in a more intense and career-building training intervention. We see these individuals as the company "go-to people" who will likely be candidates for future leadership positions. Training will include general leadership and supervisory skill development in addition to any company-specific skill development.

The company must agree to the following:

- will provide additional information for each trainee/employee for which grant subsidies are being used: Name, wage rate, SSN (with worker approval), etc………. (Collection of company and trainee information is for the purpose of state project monitoring requirements and will be kept in strict confidence, limiting access only to the funder (PA Labor and Industry), the grantee (Westmoreland-Fayette Workforce Investment Board) and the contractor (New Century Careers). Release of any information will be for project purposes only and will be limited to the scope of this project. Only participating company names and aggregate project data will be released publicly.)
- will provide the project manager with project match requirements, such as the value of planning time for executives and managers and for release time of all trainees for which the company receives program subsidies.
- provided Federal Employer ID number (FEIN) ______________
- understands that training funds are limited and therefore subsidized training will be based on available funding. Companies will be made aware if funds are no longer available…all prices will be specified on actual training contracts.

By signing this agreement, we ___________ (company name) commit to work with the New Century Careers Team to define the customized training plan and scope of delivery which, when mutually agreed upon, will result in the signing of an actual training contract.

________________________ ________________________
Signed by Company Rep. Signed IP Coordinator/LWIB Representative

Contact: Westmoreland-Fayette Building & Construction IP, Bill Thompson, Westmoreland-Fayette Workforce Investment Board725-755-2145, wthompson@westfaywib.org

Reaching out to New Partners – Capacity Building with the PA CareerLink:

In Northwest PA each individual county has a Business Service Unit representative that is a shared staff between the Local Workforce Investment Board and the county level economic development organization. In addition to visiting companies in their individual counties, the Business Service Unit also convene and lead a monthly meeting of other county level service providers. In both cases the needs of companies are discussed and when appropriate a referral is made to the IP program manger and facilitator. The program manger and facilitator attempt to schedule an in person visit, or at the very least delivery of a professional marketing piece which details IP history, accomplishments to date and works in process. If the company would like to be included in the distribution list of the IP, they are added and will be considered a member upon initial participation. ***Contact: Northwest PA Industry Partnerships, Michelle Ziezula, 814-333-1286, michelez@nwpawib.org***

Communication and Meetings

Forms of Communication

Industry Partnerships use various communication channels to effectively communicate Partnership activity. The sharing of information is often with the intentions of enhancing awareness, recruitment efforts, maintaining relevancy, and administrative processes.

The following list highlights a variety of applications implemented by Industry Partnerships:

- Advertisements (including radio, newspaper and television)
- Brochures (hard copy & electronic)
- Conference Calls
- Electronic Updates
- Email ListServs
- Informational Packets
- IP Membership Guides
- Meeting Minutes
- Outreach Events (ex. K-12, Trade Association, etc)
- Social Events (ex. NASCAR events, Reports to the Community, etc.
- Webinars
- Websites
- Other

Communication Before, During, and After Meetings

All IP meetings are scheduled for the entire progam year at the end of the previous program year. Meetings occur monthly, the same day of the week, week of the month and time of day. A conference call option is included for all meetings. Sub-committees and task forces are scheduled in the same manner upon their creation. A meeting reminder is sent one week in advance of all meetings and agenda and meeting materials are sent two days in advance of the meeting. Meeting notes are taken at all meetings and distributed to the membership two days after the meeting. At the subsequent meeting, the previous month's notes are reviewed as a regular agenda item and are approved as the official record. The IP facilitator is responsible for managing the process detailed above.
Contact: Northwest PA Industry Partnerships, Michelle Ziezula, 814-333-1286, michelez@nwpawib.org

Sample Agendas

AGENDA EXAMPLE #1

I. **Welcome & Introductions**
II. **Approval of Minutes**
III. **Membership Reports**
    a. IP Coordinator
    b. Subcommittee Reports
    c. Stakeholders (includes, PA CareerLink, WEDnet, Youth, Pennsylvania Center for Health Careers, and others)
IV. **Old Business** (includes open action items, goals/outcomes review, assessment, sustainability, governance, training, capacity building, etc)
V. **New Business** (includes best practice sharing, planning, evaluation, other items, etc)
VI. **Open Discussion**
VII. **Next Steps** (includes a recap of the action items generated from today's meeting)
VIII. **Next Meeting** (includes date/time/location, agenda, etc.)

Contact: PA Workforce Investment Board, 717-772-4966

AGENDA EXAMPLE #2

I. **Approval of Minutes**
II. **Report of the Employer Chairperson**
III. **Report of the IP Coordinator**
IV. **Report of the WIB Staff**
V. **Report from the CareerLink Staff Representative**
VI. **Report from the WEDNET/Youth Coordinator**
VII. **Report from the Subcommittees**
VIII. **Report from the Pennsylvania Center for Health Careers (PA WIB Health Care Industry Partnership Coordinator)**
IX. **Old Business**
    a. Open Action Items
    b. Review Goals/Outcomes
    c. Assessment
    d. Sustainability
    e. Governance
    f. Training
    g. Capacity Building
IX. **New Business**
    a. Industry Input/Sharing of Best Practices
    b. Planning
    c. Evaluation
    d. Other Items
ii. **Next Meeting**
    a. Parking Lot
    b. Agenda items-next meeting
    c. Responsibilities/Next Steps
    d. Date, Time, Location

Contact: PA Workforce Investment Board, 717-772-4966

In-Kind & Cash Match Calculation

Berks County Industry Partnership
In-Kind and Cash Match Employer Form

Please use your
Company's Letterhead

Date:

As a requirement to accepting grant funds for training through the Industry Partnership Worker Training Grant Program, documented below is paid employee(s) work release time as match and (/or) cash match:

Training Course Selected: ____
Date(s) of Training: ________________________________

IN-KIND Match:
# of Employees X Hrs of Training X Dollars = Paid work release time
(away from work) (salary & benefits)

____________ X __________ X $___________ = $_________________

CASH Match:
$________________ - $________________ = $____________________
Cost of Training – grant funds = Company Cash Match

______________________________ Date __________________
Signature

____
Title

Please return the form to:

IP Coordinator
COMPANY
ADDRESS
CITY, STATE ZIP
Scanned electronic document to [enter email address here]
Fax copy to XXX-XXX-XXXX

Contact: Berks County Adv. Manufacturing Industry Partnership, Rory Stevenson, 610-988-1303, rstevenson@bccl.org

Innovative Model

Lancaster County – Addressing Systems Change through Industry Partnerships

As employers are engaged, employer feedback notes that incumbent worker training is great but that they also need entry-level people who are really ready to work with good foundation skills, a plan to assure that they get to work on time and ready to participate, functional language skills that will allow them to work safe, and some hard skills that will allow the individual to quickly engage in the requirements of the workplace. The Industry Partnership utilizes the 25% "new hire" allocation of Industry Partnership Worker Training funds to fund a Ready2Work program, which includes assessment, enrichment, and short-term skill training.

A Career Readiness Credential is required to participate in the short-term (no more than 8 weeks) skill training. The Partnership currently offers training in pre-allied health preparation, customer service, introduction to manufacturing, HOT (hands-on training) lab in mechanical maintenance, construction 101, printing 101, introduction to industrial food sanitation, welding, Microsoft Unlimited Potential, and fork lift driving. New short-term training that will last up to 3-6 months in administrative support, computer hardware technician, laboratory skills, building maintenance, welding, environmental remediation, and sales will begin in May 2009. Ready2Work employers, many of whom are Industry Partnership members, have the first opportunity to interview the graduates of these programs. Many participants are hired immediately after training and most retain their jobs. In a similar fashion, employers from Industry Partnerships have stepped forward to be involved in every part of the program of the Lancaster County Youth Council from contributing to summer STEM and career camps to participating in the Pathways to Gold Collar Careers Nights (focused on eighth grade students and their parents) in the fall to special year-long career activities related to career education. ***Contact: Lancaster County Industry Partnerships, Scott Sheely, Lancaster County Workforce Investment Board, 717-705-0333, ssheely@dejazzd.com***

PLANNING

IDENTIFY GOALS, PRIORITIZE OBJECTIVES, AND DEVELOP IMPLEMENTATION PLANS

Strategic Planning Process

Chester County Health Care Partnership (CCHCP)
2009 Strategic Planning Process

Pre-strategic planning meeting

- Environmental scan
- CCHCP conducted several training needs assessments, a basic business needs assessment and conducted a roundtable discussion regarding what brings partners to the table.
- Identified key issues and questions to be addressed
- Plan strategic planning session (by strategic planning committee)

Strategic Planning Meeting

Introduction of Session – 5 minutes (facilitated by strategic planning consultant, a member of the partnership)

1. Mission Statement Review (printed on name tents) – 5 minutes
2. Partnership Development and Accomplishments – 30 minutes (facilitated by board president, board members and program coordinator)
   - History of how partnership developed, connection to CCEDC, CCWIB and PA Center for Health Careers)
   - 07-08 highlights and accomplishments
   - Training summary
   - Highlights of what brings people to the CCHCP table
3. Strategic Planning – Small Group Discussion – 15 minutes per question (large group broken up into 3 small, pre-determined groups; each group selected a recorder and reporter)
   - What are the 3 most important action/priorities/projects for the CCHCP over the next year?
   - How can key stakeholders better participate in the CCHCP?
4. Group Reporting – 30 minutes
5. Sustainability Discussion – 20 minutes (facilitated by program coordinator)
   - What would you be willing to contribute monetarily for the partnership (e.g., provide lunch for event, showcase, other sponsorships, provide no-cost training, cash contribution)?
   - How do you pay for training?
   - How can we best demonstrate and communicate to funders the value of this partnership?
6. Conclusions (summarize results from small groups) – 20 minutes (facilitated by strategic planning consultant)

Post-strategic planning meeting

Executive committee narrowed the priorities identified to the top three.
Partnership surveyed regarding resources available for the partnership.

Next steps

Develop an action plan that addresses goals, specifies objectives and work plan. Finalize a written strategic plan that summarizes the results and decisions of the strategic planning process and ties into the strategic plans of the PA Center for Health Careers, CCWIB and CCEDC. Review the strategic plan a minimum of every three years based on the CCHCP by-laws. ***Contact: Chest County Health Care Partnership, Mary Fuchs, Chester County Economic Development Corp., 610-458-5700, mfuchs@cceconomicdevelopment.com***

Abbreviated Action Plan

Northeast Pennsylvania Logistics & Transportation Industry Partnership
Action Plan

The Logistics & Transportation Industry Partnership has identified four action areas:
These action areas are as follows: Education and Training, Industry Image and Current Trends and Marketing and Promotion. Each action area is vital to the continued success of the Logistics & Transportation Industry Partnership as it strives to create awareness of the careers available in this high-tech and growing industry.

Northeast PA Logistics & Transportation Industry Partnership
The Partnership will seek to develop multiple funding sources, both in-kind and monetary, to create sustainability and viability for the organization. Sustainability will be examined in terms of financial, membership and outreach action items.

Financial Action Item: The Partnership will consider implementing annual membership dues, acquire sponsors/vendors for Partnership events and the www.nepapeopleonthemove.org website, apply for grants, research foundations, request additional state, local, public and private monies.

Monitor/Measurement Criteria - The Partnership will monitor and present timely reports on the following:
• Membership Dues Payments
• Grants Applied For/Received
• Private Donations
• Vendor Sponsorships
• Event Sponsorships
• Website Sponsorships

Membership Growth Action Item: In order for the Partnership to thrive, membership must continue to steadily increase. The Partnership will identify and actively engage key stakeholders in the regional industry. Existing member benefits will be defined. Additional benefits will be developed to assist in the recruitment and retention processes.
Communication channels will include mailings, e-mailings website submissions, conference calls, surveys, website bulletin boards/chat rooms, Reports to the Community and other regional meetings.
Outreach visitations will be made to L&T Industry, Transportation Industry and Cross Cluster Industry companies to encourage Partnership membership. Companies that have already benefited from incumbent worker training programs will be encouraged to join.

Monitor/Measurement Criteria – The Partnership will monitor and present timely reports on the following:
• Membership Growth
• Number of communication messages delivered and response to same
• Outreach visitations completed and results of same

Contact: Northeast PA Logistics & Transportation Industry Partnership, Patti Lenahan, Luzerne-Schuylkill Workforce Investment Board, 570 822-1101, patricialenahan@lswib.org

Selecting Training Providers: An Inclusive Model

Delivery of Industry Partnership Worker Training can be implemented in an inclusive model whereby all qualified providers are invited to participate in the project. A three-quote process will be implemented to determine provider participation. The IP Coordinator, on behalf of the employer/employee representatives, negotiates the scope of activities for each provider and a final plan is made available upon request. When it is desirable to utilize a project manager or sub-cluster coordinator for the training process, the negotiations and development of the plan can be accomplished by the project manager with the final process recommendations and budget submitted to the LWIB by the IP Coordinator for approval. Implementation of the training plan by the project director shall be monitored by the IP Coordinator with regular reporting of progress to the steering committee, and made available upon request. ***Contact: South Central PA Industry Partnerships, Hilary Thomas, 717-920-7092, hthomas@wibpa.org***

IMPLEMENTATION & SUSTAINABILITY PLANS

SUSTAINABILITY MODELS

Example #1 – 100%-25% Breakdown

The "100-25" sustainability model's approach centers on the ability of the Partnership to develop cash sustainability from training activity. Financial sustainability is derived from training participant fees (cash) which are then placed into a separate account for the Partnership to access and utilize.

Key Concepts:

- Sustainability Account Holder requires proper status (ex. 501c3, for-profit etc)
- Communication-Communication-Communication
- **Selected Number of Participants Per Training is Arbitrary – this number critically impacts the funds collected and the total cash match received (i.e. Maximum number of Training Seats vs. Average number of Training Participants)
- Process & Procedures for Collection of "sustainability funds"
- Process & Procedures for Access and Utilization of "sustainability funds"
- Sustainability Fund Account options (savings, checking, money-market, etc)
- Grant Funds pay 100% of training cost; training vendor receives one check; training participant employers provide sustainability fund check to IP

Process
Total Cost of Training = $10,000
Number of Participants Per Training** = 10
Total Cost of Training Per Participant ($10,000/10) = $1,000
Total Cash Match Per Training Participant ($1,000*25%) = $250 (class registration fee)

If……
5 Participants
Estimated Total Cash Match ($250*5) = $1,250
Grant Funds deducted for Cost of Training = $10,000
10 Participants
Estimated Total Cash Match ($250*10) = $2,500
Grant Funds deducted for Cost of Training = $10,000
15 Participants
Estimated Total Cash Match ($250*15) = $3.750
Grant Funds deducted for Cost of Training = $10,000

100-25%

- Grant Funds Deducted for Cost of Training (100%) = $10,000 (total)
- Total Cash Match Placed into "Sustainability Fund" (if 10 Participants) ($250*10) = $2,500

Contact: PA Workforce Investment Board, 717-772-4966

EXAMPLE #2 – 75%-25% Breakdown

The "75-25" sustainability model's approach centers on utilizing grant funds to subsidize the gap between the cost of training and the participant contribution. Financial sustainability is derived from leveraging funds, identifying new resources, etc. Training grant funds make up the difference between the total cost of training and the contributions received by the training participants.

Key Concepts:

- Communication-Communication-Communication
- **Selected Number of Participants Per Training is Arbitrary – this number critically impacts the participant contributions and the total cash match received (i.e. Maximum number of Training Seats vs. Average number of Training Participants)
- Process & Procedures for Payment to Training Vendor
- Process & Procedures for Collection of Employer Contributions
- Grant Funds pay 75% of training cost; training participant employers provide 25% match to either LWIB, Vendor, or IP manager (dependent upon established process and procedures for collection of contributions).

Process:

Total Cost of Training = $10,000
Number of Participants Per Training** = 10
Total Cost of Training Per Participant ($10,000/10) = $1,000
Total Cash Match Per Training Participant ($1,000*25%) = $250 (class registration fee)

If……
5 Participants
Estimated Total Cash Match ($250*5) = $1,250
Grant Funds deducted for Cost of Training = $8,750
10 Participants
Estimated Total Cash Match ($250*10) = $2,500
Grant Funds deducted for Cost of Training = $7,500
15 Participants
Estimated Total Cash Match ($250*15) = $3.750
Grant Funds deducted for Cost of Training = $6,250

75-25%

- Grant Funds Deducted for Cost of Training (75% if 10 Participants) = $7,500
- Total Cash Match (if 10 Participants) placed against the Total Cost of Training ($250*10) = $2,500

Contact: PA Workforce Investment Board, 717-772-4966

Sustainability Plan

SUSTAINABILITY POLICY

The Healthcare Industry Partnership (HIP) Sustainability Fund

The employers of the HIP intend to establish a partnership sustainability fund through the Regional Center for Workforce Excellence (fiscal agent for the HIP). The sustainability fund will be the repository of funds remitted by employers as part of the requirement to provide a 25 percent cash match to any incumbent worker training funds they receive through the partnership (matching fund requirements are outlined on p. 6 of the '08-'09 Industry Partnership grant guidelines). The employers will work with the fiscal agent (RCWE) to develop guidelines and directives on how the funds are to be used (inclusive of an acceptably transparent financial tracking/accountability report which gives the participating employers adequate management/decision information in real time) when the fund is established and matching funds are remitted. The employers for the purpose of furthering partnership activities and ensuring the future sustainability of the HIP will define the use of funds.

Process Flow

1. The Regional Center for Workforce Excellence will determine through the use of HIP and HIP sub-committee meeting minutes that an individual employer (individual employer is understood to mean any designated employee of the participating employer) has met the seventy-five (75) percent attendance benchmark in **both** partnership and sub-committee meeting attendance (the attendance requirement will be applied individually to both the full partnership and the sub-committees; attendance at more than the required 75 percent at either the full partnership or a sub-committee meeting will not be used to offset an attendance rate of less than 75 percent at either the full partnership or a sub-committee meeting). For Cycle A awards (training programs completed between July 1st and December 31st of the current year) attendance from the previous program year (July thru June) will be the determining factor. With Cycle B awards (training programs completed between January 1st and June 30th of the current year) attendance from the existing half year (July thru December) will be the determining factor. An employer who submits a Workforce Development Training Plan, but does not meet the attendance requirement will be notified by RCWE in writing that they are ineligible to be considered for funding until they have met the partnership attendance requirement. Employers who are deemed out of compliance with the attendance policy will be reevaluated for compliance no earlier or later than the subsequent cycle. The attendance requirement for the partnership will be waived in the instance where eligible employers are not able to utilize existing awards within an existing program year (both Cycle A and B).
2. The Regional Center for Workforce Excellence awards 100 percent of the cost of a particular training opportunity or multiple training opportunities to a company within the parameters of the Incumbent Worker Training grant award.
3. Through a Memorandum of Financial Agreement the company agrees to pay 25 percent of the total cost of the award back to the HIP Sustainability Fund established and held by the Regional Center for Workforce Excellence.
4. The company will remit the matching funds to the HIP Sustainability Fund no more than 30 days after the company submits an invoice and Request for Funds to RCWE for the training grant award made to the company.
5. Matching funds will be placed in the Sustainability Fund for use by the HIP to further the activities of the partnership or for future use of the partnership.

Example

1. The Regional Center for Workforce Excellence makes an award to Company A for training that totals $10,000.
2. Company A enters a Memorandum of Financial Agreement with the Regional Center for Workforce Excellence to remit $2,500 (25 percent of the total award) to the HIP Sustainability Fund.
3. Company A remits $2,500 to the HIP Sustainability Fund within 30 days from when it submits an invoice and Request for Funds to RCWE for the $10,000 training grant award made to the company.
4. Matching funds will be placed in the Sustainability Fund for use by the HIP to further the activities of the partnership or for future use of the partnership.

Description of Policy Change

The Regional Center for Workforce Excellence currently makes awards to employers of up to 75 percent of the total cost of training items listed on the Workforce Development Training Plan. The employer pays the remaining 25 percent of the cost of training to the training provider; thus providing for the 25 percent employer cash match required by the Pennsylvania Department of Labor and Industry.

In the proposed policy change the employer will be able to meet the requirement to provide a 25 percent cash match to the incumbent worker training award and the partnership will benefit by capturing the matching funds in the HIP Sustainability Fund. The employers will continue to benefit from the same award amount while at the same time will be contributing to the sustainability of the HIP.

Changes to Award Process and Invoicing Procedures

In order to facilitate a more timely incumbent worker training grant award and invoicing process, and to ensure effective utilization of funds deposited in the HIP Sustainability Fund, the following changes will now be in effect:

- Incumbent worker training awards will be made in 2 cycles – Cycle A and Cycle B. Awards made in Cycle A will be for training programs scheduled and/or completed between July 1^{st} and December 31^{st}. Final Requests for Funds (RFF), back up documentation and the remission of the 25 percent matching funds to the HIP Sustainability Fund will be due to the Regional Center for Workforce Excellence no later than January 8^{th}. Any balance of an incumbent worker training award that is not completely invoiced by January 8^{th} will be de-obligated from the employer receiving the award and will be made available for awards to be made in Cycle B.
- Awards made in Cycle B will be for training programs scheduled and/or completed between January 1^{st} and June 30^{th}. Final Requests for Funds (RFF), back up documentation and the remission of the 25 percent matching funds to the HIP Sustainability Fund will be due to the Regional Center for Workforce Excellence no later than July 8^{th}. Any balance of an incumbent worker training award that is not completely invoiced by July 8^{th} will be de-obligated from the employer receiving the award and will be made available for award in the new fiscal year pending approval from the Pennsylvania Department of Labor and Industry to use any remaining balance as carry-over funding.

Policy Adopted 1/9/09

Contact: Northwest PA Industry Partnerships, Michelle Ziezula, 814-333-1286, michelez@nwpawib.org

Administration & Governance of Sustainability Funds

Administration and Governance of Sustainability Funds

To assist the sustainability of Industry Partnership-Worker Training activities, as determined by the Steering Committee employer/employee representatives, IP-IPWT participant fees shall be placed in a sustainability fund held by the LWIB (fiscal agent). The sustainability funds are to be used for IP-IPWT-related expenses, including but not limited to, professional services, marketing and outreach, IPWT, administrative costs, etc. Any and all employers/employee representative participating in IP-IPWT activities agree to provide an IP-IPWT participant fee at the defined rate set by the IP Steering Committee.

Unless otherwise agreed upon by the LWIB, where IP-IPWT activities are approved and expensed under South Central IPs, it is the inherent sole responsibility and obligation of the SCWIB, as IP-IPWT fiscal agent, to collect and manage sustainability funds. All funds will be collected for each IP-IPWT. No IP will have access to any sustainability funds collected for another IP-IPWT unless formally agreed upon by both IPs and the SCWIB.

Upon the active operation of any South Central IP, IP-IPWT employer/employee representative members are provided spending discretion and decision-making over its sustainability funds, provided the intent and objective of the expense are compliant to the IP-IPWT guidelines, goals, and objectives. Should a motion be made to access the sustainability funds, an IP Steering Committee employer/employee representative vote of approval is required and should be duly noted in meeting minutes. At a minimum, a summary narrative, detailed line item budget, and copy of meeting minutes noting Steering Committee approval should be provided to the SCWIB in order to release any sustainability funds. Upon submission of supporting documentation and compliance review, the SCWIB will then issue a contract or purchase order for release of funds. Upon the disbanding of a formal South Central PA IP-IPWT initiative, where a sustainability fund has been established and maintained, the SCWIB will have final authority and management on any remaining and available sustainability funds.

Contact: South Central PA Industry Partnerships, Hilary Thomas, South Central Workforce Investment Board, 717-920-7092, hthomas@wibpa.org

EVALUATION: REPORTING THE RESULTS

Partnership Evaluation Form

Partnership Evaluation Form

2007 – 2008 Grant Year	Strongly Disagree			Strongly Agree	
1. Overall, Partnership meetings are helpful and informative.	1	2	3	4	5
2. My involvement in the Partnership was worth my organization's time and money.	1	2	3	4	5
3. The Partnership's meetings/programs were well organized.	1	2	3	4	5
4. The Partnership representative(s) was/were knowledgeable about the IP grant and grant process.	1	2	3	4	5
5. The Partnership representative(s) was/were effective in communicating IP training events & opportunities.	1	2	3	4	5
6. The Partnership's grant materials are user friendly.	1	2	3	4	5

Meeting Content:

7. In general, what did you think of the meeting contents that were done for the 2007-2008 grant year?
8. I wish more time was spent covering:
9. I wish less time was spent covering:

Training Courses:

10. In general, what did you think of the training programs you/your co-workers attended?
11. What is a training course that you/co-workers would want other industry professionals to know about?
12. Was there a training course that you/co-workers wanted to take but ran out of time this year?

Overall:

13. What do you or your organization see as the most value added piece of the Partnership?
14. How could the Partnership be more effective to your company?
15. How could the Partnership be more effective to the industry?
16. How could the Partnership improve the grant/training process?

Comments:

Contact: Lehigh Valley Industry Partnerships, Gina Kormanik, Lehigh Valley Workforce Investment Board, (610) 841-1006, gkormanik@lvwib.org

Training Evaluation Form

Training Evaluation Form

Please use your experience in this training to rate the following statements. Your feedback will help us to ensure that your training needs have been met.					
Instructor Name & Training Provider/Educational Institution:	Date:				
Course Title:					
Design & Delivery Statements	Agree		*Dis*agree		
Overall Rating:					
Attending the training was good use of my time.	5	4	3	2	1
The training was relevant and timely. If rating this 3 or less, comment why below.	5	4	3	2	1
Training Design:					
The objectives were clearly communicated and met to my satisfaction.	5	4	3	2	1
The topics were well organized and easy to understand.	5	4	3	2	1
The course materials will be useful and were of good quality.	5	4	3	2	1
The pace of the training was appropriate for the topics covered.	5	4	3	2	1
The level of difficulty of the content was appropriate for me.	5	4	3	2	1
Instructor:					
The instructor performed well overall.	5	4	3	2	1
The instructor is knowledgeable about the subject matter.	5	4	3	2	1
The instructor practiced effective time management.	5	4	3	2	1
The instructor answered my questions to my satisfaction.	5	4	3	2	1
Training Exercises: I found the exercises valuable in learning how to apply the concepts.	5	4	3	2	1
Training Applications:					
I will apply what I learned to my job and/or other areas of my life.	5	4	3	2	1
I will recommend this training to others within my organization.	5	4	3	2	1
Logistics:					
The seating arrangements were appropriate for the session.	5	4	3	2	1
I was able to see and hear the presentation without distractions.	5	4	3	2	1
Ample breaks were provided without disrupting the flow of the session.	5	4	3	2	1

Comments (if additional space is needed, please use the back of the form):

What topics would you has liked to have spent more or less time on?
What did the instructor do that worked well and what would you suggest to improve his or her effectiveness?
What was most useful about the exercises?
What changes would you recommend to improve the course and make it more effective?

Contact: Berks County Adv. Manufacturing IP, Rory Stevenson, 610-988-1303, rstevenson@bccl.org

Appendix B: References

Framework based on:

Kaye, G, & Wolff, T. (Editors). (1997). *From the ground up. A workbook on coalition building and community development.* 2nd edition. AHEC/Community Partners, 24 South Prospect Street, Amherst, MA. 01002

Foster-Fishman, P.G., Berkowitz, S.L., Lounsbury, D.W., et al. (2001). *Building collaborative capacity in community coalitions: a review and integrative framework.* American Journal of Community Psychology. 29(2): 241-261

Polit, D.F., & Beck, C.T. (2008). Nursing research: Generating and Assessing Evidence for Nursing Practice (8th ed.). Philadelphia: Lippincott.