



DELAWARE WORKFORCE INVESTMENT BOARD (DWIB)

Strategic Planning Retreat

Report on Outcomes

Prepared by

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Facilitator and Strategic Planning Consultant to the Delaware Workforce Investment Board

Tuesday, October 23, 2012 ♦ 8:00 a.m. – 4:00p.m.

Delmarva Power Conference Center

4100 South Wakefield Drive, Newark, DE 19702

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I. Planning Retreat Agenda

8:00 – 8:30 a.m. Registration and Breakfast

- 8:30 – 8:45 Welcome and Introductions (Chairman Gary Stockbridge)
- 8:45 – 9:15 Presentation: Theme #1 – Gathering & Acting on Industry Intelligence (Stacey Laing)
- 9:15 – 9:30 Q & A Discussion (Tammy Ditzel)
- 9:30 – 10:00 Presentation: Theme #2 – Career Ladders for Dislocated Workers (Maureen Whelan)
- 10:00 – 10:15 Q & A Discussion (Tammy Ditzel)

10:15 – 10:30 a.m. Break

- 10:30 – 11:00 Presentation: Theme #3 – Veteran’s Services (Bill Potter)
- 11:00 – 11:15 Q & A Discussion (Tammy Ditzel)
- 11:15 – 11:45 Presentation: Theme #4 – Disabled Workers Initiatives (Andrea Guest)
- 11:45 – 12:00 Q & A Discussion (Tammy Ditzel)

12:00 noon – 12:45 p.m. Lunch

- 12:45 – 1:00 Overview of Afternoon Planning Activities (Tammy Ditzel)
- 1:00 – 3:00 Small Group Planning
- 3:00 – 3:45 Group Presentations
- 3:45 – 4:00 Closing (Chairman Gary Stockbridge)

II. Morning Session Overview & Outcomes

Overview

The purpose of the morning session was to provide the Delaware Workforce Investment Board (DWIB) Members with education around four strategic themes for the DWIB in 2013. The four themes were decided upon by the Strategic Planning Committee, and were based on results of research related to national trends, workforce development needs unique to Delaware, and the economic and workforce development initiatives of Delaware's Governor, The Honorable Jack Markell.

Each theme was assigned to a "Champion" on the planning committee. The Champions were chosen based on their experience and expertise related to their assigned theme. They were tasked with pulling together a small team of people who would be key partners in researching best practices and defining success for their assigned theme. The themes and Champions are highlighted below in Table 1.

Table 1 – Themes & Champions

Theme	Champion
1. Gathering & Acting on Industry Intelligence	Stacey Laing, Employment and Training Administrator Delaware Department of Labor, Division of Employment & Training (DOL/DET)
2. Career Ladders for Dislocated Workers	Maureen Whelan, State Director of Adult Education Delaware Department of Education (DOE)
3. Veterans' Services	Bill Potter, Deputy Director Delaware Workforce Investment Board (DWIB)
4. Disabled Workers Initiatives	Andrea Guest, Director Delaware Department of Labor, Division of Vocational Rehabilitation (DOL/DVR)

Champions were asked to prepare a presentation on the results of their theme research, and deliver a 20-30 minute presentation during the morning session of the 2012 Strategic Planning Retreat – not only to educate Board Members, but also to prepare Members for the small group planning sessions in the afternoon. The presentations were consistently organized and delivered around six components:

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|----------------------|--|---|
| 1 – Theme Definition | 3 – Delaware’s <i>Present State</i> Related to the Theme | 5 – Benefits of Achieving Desired State |
| 2 – Theme Purpose | 4 – Delaware’s <i>Desired State</i> Related to the Theme | 6 – Best Practices to Inspire Change |

After the morning welcome and introduction, Chairman Gary Stockbridge (President, Delmarva Power Region) turned it over to the Champions to present their findings. Tammy Ditzel facilitated a 10-15 minute Q & A Discussion after each presentation.

Board Member Engagement

Board Members were given notes pages organized around the same six components delivered in the presentations. The notes pages allowed Members to record key points they determined critical for the afternoon planning session, and to jot down questions to ask the Champion during the Q & A Discussion. The notes pages were not collected, and only served as a tool for Members to organize their thoughts and have a reference for the afternoon.

Members were also asked to determine, as they listened to the morning presentations, which of the four themes would benefit the most from their expertise, passion, knowledge, and / or interests. They were assigned an extra name badge during registration (color-coded to reflect their industry, encouraging afternoon work groups of diverse perspectives). The extra name badge was used by the Board Member to assign themselves to an afternoon work group by placing the extra name badge on one of the four flip chart sheets in the back of the room – each sheet labeled with one of the four themes.

By lunchtime, all Board Members had assigned themselves to a work group and were encouraged to eat lunch together in their respective breakout rooms.

Outcomes

The outcomes from the morning session were education, understanding, and enthusiasm. Board Members seemed ready to work and interact – lending their ideas, experience, and knowledge to the advancement of the theme they chose.

III. Afternoon Session Overview & Outcomes

Overview

The Theme Champions were the Facilitators for the afternoon work groups. Each Board Member was provided a planning template to guide them through the afternoon planning process. Each work group had two hours to complete all sections of the template, and prepare a short 10 minute presentation to be delivered to the full group of participants at the end of the planning retreat.

To maintain consistency between groups, the Champions were asked to fulfill the role of the Facilitator by:

- Asking for a volunteer to present their work group's results to the full group at the end of the planning time
- Recording the workgroup's brainstorming on a flip chart
- Ensuring that every member of the group contributes to the discussion
- Ensuring that everyone completes their planning template in full, including their name and phone number
- Collecting all the flipchart sheets and templates after the group presentation, and submitting them to Tammy Ditzel for inclusion in the Planning Retreat Report on Outcomes

Outcomes

Work groups were manageably sized and industry diverse. Members actively engaged in brainstorming a theme goal - as well as identifying strategies, resources, action items, and measurements of success. Each work group delivered a presentation highlighting their goal and proposed "way forward" in achieving the theme goal. Completed planning templates and presentation flip chart sheets were collected from each work group. The results of each work group is summarized in Section IV on the following pages.

IV. Work Group Planning Results

Theme #1: Gathering & Acting on Industry Intelligence

Champion: Stacey Laing, Employment and Training Administrator
Delaware Department of Labor, Division of Employment & Training

Work Group Participants: Bill Parks, Chris Burkhard, Hon. James Johnson, Hon. John McMahon, James Wolfe, Jeff Bross, Jerry Esposito, Joe Farley, John Austin, Marion Reitz

Theme Goal(s): Develop a Process for Future Job Growth

<p>1. What should be our strategy (or approach) to achieve the goal?</p>	<ul style="list-style-type: none">• Engage future growth employers and communicate importance of developing a process to fill their employment needs• Grow trust with future growth employers, so that they will turn to us to fill their future hiring needs• Develop multiple approaches for different employer groups (i.e. public / private)• Utilize the DWIB to execute Survey Monkey
<p>2. What are some of the obstacles that may get in the way?</p>	<p>The employers' inability to project future hiring needs.</p> <p>Determining how we add value.</p> <p>How to develop a relationship with employers we currently do not work with.</p>

<p>3. What are the resources available to us that we may tap into? Can any of the obstacles serve as a resource instead?</p>	<p>DWIB / DOL Chamber Bio-Tech Trades SIDES – UI Initiative OOLMI – Conduct telephone survey (Erich Heintz –technology piece)</p>
<p>4. Let's discuss a way forward. How will we get to the 'desired state' and reach our goal(s)...what are the steps we need to take to get there?</p>	<ul style="list-style-type: none"> • Send out a quarterly survey with a deadline, and quickly share results with participants. Instead of tackling all 27,000 employers, do a more manageable cross-section each quarter. Keep the survey short and simple (3-5 questions), and tailor it to the industry. Share unemployment insurance information as an attention-grabber. Track progress and reach out to non-responders with a follow-up phone call. Work with DOL to convene a work group for feedback and support.
<p>5. How will we know we have reached our desired state and achieved our goal(s) – in other words, how will we measure our success?</p>	<ul style="list-style-type: none"> - Increased number of employees - Return rate of 15% - Improved quality of data. Is the data good data? Does it identify growing sectors that can result in career ladder opportunities? Are we able to utilize the data? - Assess national employer data vs. state employer data - Trends in sectors

Theme #2: Career Ladders for Dislocated Workers

Champion: Maureen Whelan, State Director of Adult Education
 Delaware Department of Education

Work Group Participants: Alice Coleman, Darius J. Brown, Elaine Archangelo, Felicia Kellum, George Krupanski, John Chrzanowski, Karen Pasquale, Kathy Butler, Ron Walker, Samuel E. Lathem, Tom Smith, Rachel Gold

Theme Goal(s): Develop a Career Pathway in a Particular Sector that Engages all Stakeholders in a Framework and Meets the Need of the Employer and Job-Seeker

<p>1. What should be our strategy (or approach) to achieve the goal?</p>	<ul style="list-style-type: none"> • Ensure that we have all stakeholders • Review data on possible sectors, so we can choose • After sector selected, recruit employers to view national models
<p>2. What are some of the obstacles that may get in the way?</p>	<p>Institutional barriers (i.e. DTCC, GED, transcripts, merit rules, higher standards for employment) Higher standards for high school diploma Changes in GED Lack of buy-in to alternative credentials Lack of education of employers about assessments (i.e. CASAS and TABE)</p>
<p>3. What are the resources available to us that we may tap into? Can any of the obstacles serve as a resource instead?</p>	<p>Blue collar (Board control) Through procurement, control funding to award to those who meet XYZ criteria Change in GED could be a catalyst to change credentials – nationally recognized</p>

<p>4. Let's discuss a way forward. How will we get to the 'desired state' and reach our goal(s)...what are the steps we need to take to get there?</p>	<p>RFP – PY13 – DOL: Include language that supports Career Pathways (i.e. contextual learning)</p> <table border="1"> <thead> <tr> <th data-bbox="772 305 1591 337"><u>Action</u></th> <th data-bbox="1591 305 1906 337"><u>Time Frame</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="772 345 1591 378">• Identify sector working with Industry Intelligence Group</td> <td data-bbox="1591 345 1906 378">End of January 2013</td> </tr> <tr> <td data-bbox="772 386 1591 459">• Develop / research career pathways that fit sector (validate, and get Board decision to support)</td> <td data-bbox="1591 386 1906 459">March 1, 2013</td> </tr> <tr> <td data-bbox="772 467 1591 500">• Bring together a range of stakeholders</td> <td data-bbox="1591 467 1906 500">May 1, 2013</td> </tr> <tr> <td data-bbox="772 508 1591 540">• Integrate into funding guidelines</td> <td data-bbox="1591 508 1906 540">May 2013 (DOE)</td> </tr> <tr> <td data-bbox="772 548 1591 581"></td> <td data-bbox="1591 548 1906 581">October 2013 (DOL)</td> </tr> <tr> <td data-bbox="772 589 1591 621">• Review / realign policies in government</td> <td data-bbox="1591 589 1906 621">October 2013</td> </tr> </tbody> </table>	<u>Action</u>	<u>Time Frame</u>	• Identify sector working with Industry Intelligence Group	End of January 2013	• Develop / research career pathways that fit sector (validate, and get Board decision to support)	March 1, 2013	• Bring together a range of stakeholders	May 1, 2013	• Integrate into funding guidelines	May 2013 (DOE)		October 2013 (DOL)	• Review / realign policies in government	October 2013
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<p>5. How will we know we have reached our desired state and achieved our goal(s) – in other words, how will we measure our success?</p>	<ul style="list-style-type: none"> - An actual map to use for sector - Increase in EFL's - Employment / post-secondary education - Retention - Wages 														

Theme #3: Veteran’s Services

Champion: Bill Potter, Deputy Director
Delaware Workforce Investment Board

Work Group Participants: Christine Kubik, David B. Rich, Gary Stockbridge, Lori A. Reeder, Paul Morris, Rebecca Leyson, Stephan Lehm

Theme Goal(s): Reduce the Number of Unemployed Veterans (75% of the general population) by Educating Employers, Communicating Incentives Available for Hiring Veterans to the Business Community, and Simplifying the Process

<p>1. What should be our strategy (or approach) to achieve the goal?</p>	<p>I. Educate Employers</p> <ul style="list-style-type: none">• Comprehensive plan for business• Employer Conference on May 16 – re-design veterans services• How do we find the veterans?• Chamber of Commerce – Business / Employer• Society for Human Resource Management (SHRM)• Collateral (state sponsored)• Press Releases / Social Media / Twitter / Facebook / LinkedIn• Educate businesses on the problem• “Who you know” – a catalyst <p>II. Incentives</p> <ul style="list-style-type: none">• Coin• Tax incentives (federal, state, age, combined) Work Opportunity Tax Credit (WOTC)• Patriot Award<ul style="list-style-type: none">- Hiring requirements (hiring related)- Levels of fundraising- 10 point system (Kubik)• MCP (Military Community Partners)
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<p><i>Continued...Strategy</i></p>	<p>III. Simplify the Process</p> <ul style="list-style-type: none"> • Access <ul style="list-style-type: none"> - Job announcements to Vet Rep - Priority of service • Benefits <ul style="list-style-type: none"> - Tracking vets - Job e-lernt • DJL (Delaware Job Link) <ul style="list-style-type: none"> - Logon (Lori Reeder / C. Kubik) • Job Fairs <ul style="list-style-type: none"> - Track veterans by registration - Identify and recognize veterans (lapel pin) • Transferring (state laws) <ul style="list-style-type: none"> - License - Certifications 	
<p>2. What are some of the obstacles that may get in the way?</p>	<p>Education Economy Skill sets matched with employers & employment opportunities Clutter</p>	
<p>3. What are the resources available to us that we may tap into? Can any of the obstacles serve as a resource instead?</p>	<p>ESGR One-Stop Vet Reps DNG PR budget MCP (Military Community Partners) DWIB / Members USDOL Various websites (Bill's list)</p>	<p>Institute for Veterans and Military Families TAP (Transition Assistance Program) Chambers of Commerce Job Fairs VSO (Veterans Support Organizations) Congressional Delegation</p>

Theme #4: Disabled Workers Initiative

Champion: Andrea Guest, Director
Delaware Department of Labor, Division of Vocational Rehabilitation

Work Group Participants: Barbara Riley, Carolanne O’Riley, Martin Simon, Mitchell Magee, Pete Bradley, Ralph Cetrulo, Gwen Jones

Theme Goal(s): 1 – Engage Employers to Hire More People with Disabilities
2 – Promote and Expand Partnerships

<p>1. What should be our strategy (or approach) to achieve the goal?</p> <p>Goal 1: Engage Employers to Hire More People with Disabilities</p>	<p>Question to answer for employers: How does hiring people with disabilities fit into the work we do? (structured system – is there flexibility for hiring people with disabilities?)</p> <ul style="list-style-type: none">• Need to make known what businesses’ requirements are, for those who are sending clients / participants to be hired• Get management to commit to hiring people with disabilities• Employers need to know where to go to access potential employees• Need assistance with knowing about special accommodations• Understanding the different types of disabilities• Businesses need to know where to go for assistance (overall) in order to help their employees with disabilities (Vocational Rehabilitation has Employment Specialists and VR Counselors – intensity on employment outcome)• Business Leadership Network (BLN) ramping up in Delaware• Be honest with employers when there are issues• Educating employers that people with disabilities make great workers and come with a support system• Educate, dispel myths, and make known the benefits of hiring individuals with disabilities – whether a large or small business
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<p>1. What should be our strategy (or approach) to achieve the goal?</p> <p>Goal 2: Promote and Expand Partnerships</p>	<ul style="list-style-type: none"> • Need realistic training programs that will help individuals be successful (customized for the person) • Understand that reality is fine for people with disabilities • Employers work as partners with VR to let us know what the job requirements are. VR would act as consultants. • Expand to some in and educate business on programs / services for people with disabilities • Partnering will work with anyone wishing to hire • Other partners to engage: <ul style="list-style-type: none"> - Health & Social Services - Education (school districts) - Parents (educate them so they can be comfortable with letting go) - Transportation - Trade Associations - Special Olympics (skill development) - Labor - DEDO (to approach new employers)
<p>2. What are some of the obstacles that may get in the way?</p>	<p>Small businesses do not have HR Departments, so it's nearly impossible to keep up with DOL regulations</p> <p>Doing more with less – inability to provide the level of focused training that would be necessary</p> <p>Healthcare concerns</p>
<p>3. What are the resources available to us that we may tap into? Can any of the obstacles serve as a resource instead?</p>	<p>Other businesses share their success with hiring individuals with disabilities</p>

V. Next Steps

- 1 – Tammy Ditzel will send an e-mail of thanks to the Champions no later than 11/27/12, and request their feedback on the Report on Outcomes – due by 12/4/12. Champions will also be asked to define a working team to carry the theme goal forward, communicate to each of those potential team members, and gain their commitment to the team. Champions will bring that information with them to the meeting mentioned below in #3.

- 2 – Final Report on Outcomes will be sent out to the full Board and Guests no later than 12/12/12.

- 3 – Gwen Jones, Gary Stockbridge, and Tammy Ditzel will meet face-to-face with Champions no later than 12/19/12 to de-brief the Planning Retreat and work together to design a consistent way forward/template to accomplish the theme goals.

- 4 – The new year will begin with the Champions having a kick-off face-to-face meeting with their working team – using the agreed-upon template to plan, define action items, and set timelines for completion.