

# COLORADO REGIONAL SECTOR PARTNERSHIP CONVENER TRAINING WORKBOOK



CWDC



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Prepared by Collaborative Economics  
and the Woolsey Group, LLC



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# A

## DEFINING THE SCOPE OF YOUR SECTOR PARTNERSHIP

### MAKE THE CASE FOR A NEW APPROACH

Launching a sector partnership often represents a break from tradition. It challenges the status quo, requires a much deeper level of employer engagement, demands a much greater commitment to collaboration, and can deliver remarkable results. But, it does require that you make the case for a new approach, not just a tweak to existing efforts, to prepare people for a very different kind of partnership. Use examples from other places, and the talk through “what works well and not so well” when it comes to sector partnerships. Draw from the sector partnership toolkit.

### CREATE A REGIONAL SECTOR STRATEGY TEAM

Those who answer the call for a new approach will become the core of your regional sector strategy team. Some or many of these team members attended the Sector Strategy Summit in January, while others have been brought on board since then, and still others have yet to be recruited. It is important to include not only partners from workforce development, but also economic development and other segments of the community that could be called on to collaborate with employers. When assembling the team, remember to recruit for “champions” not “representatives”, and for “doers” not “talkers.” Set the tone early that a sector partnership is about what you can contribute to the effort, not what you resources you can access or what product you can sell. The result will be a coalition of the willing.

### ASSEMBLE A SHARED SET OF FACTS

Decisions-making should be data-driven, not anecdote inspired or politically influenced. If you are to work collaboratively, you must have a shared set of facts from which you operate. In the case of sector partnerships, this means a good quantitative profile of the regional economy that enables your team to identify key sectors and clusters, and assess them in terms of job growth, wages, specialization, and other factors. The key here is working through the shared facts together, and then surfacing different perspectives and interpretations from your diverse team. But it must be one more thing: you must collectively assess “readiness” factors of a target industry in your region. This is where your anecdotal knowledge does come into play.

### NOTES

### FOCUS ON WORKING DEFINITIONS

As you determine the scope of your sector partnership, keep in mind the strong benefits of “working definitions.” A common pitfall at this juncture can be paralysis by analysis, where the perfect becomes the enemy of the good. In other words, as you identify the sector or sectors as the focus for your efforts, remember that you are developing a working definition that is always evolving to some degree, especially at the margins. That goes for the specific industry segments that you target, the geographic scope of your sector partnership, and the composition of your sector team.

### DEVELOP WORKABLE SOLUTIONS

While you need to be satisfied with working definitions to avoid paralysis, you must also focus on specific obstacles that could compromise your efforts, and develop workable solutions so you can move forward. These will be in situations in which there are no single right answers. The key here is to talk through options, define the best path, and move ahead, while revisiting your assumptions and decisions periodically. Common areas where you may need workable solutions: how to overcome long distances when engaging employers, how big to build your sector partnership, and how to build on existing efforts and avoid turf battles.

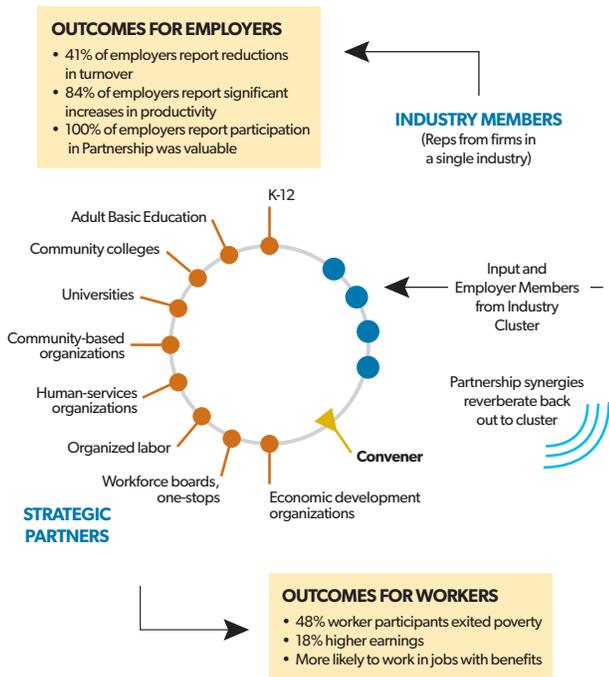
### NOTES

## SECTOR PARTNERSHIPS: WHAT WORKS WELL (AND NOT SO WELL)

Clusters of Companies  
 Employers as Partners  
 Industry Driven  
 Regionally Based  
 Existing Industry Strength or Emerging Speciality  
 Focus on Industry Competitiveness and Growth  
 Opportunity Focused  
 Employer Priorities First  
 Champion Driven  
 Coalitions of the Willing  
 People and Relationships  
 A Disciplined, Replicable Process

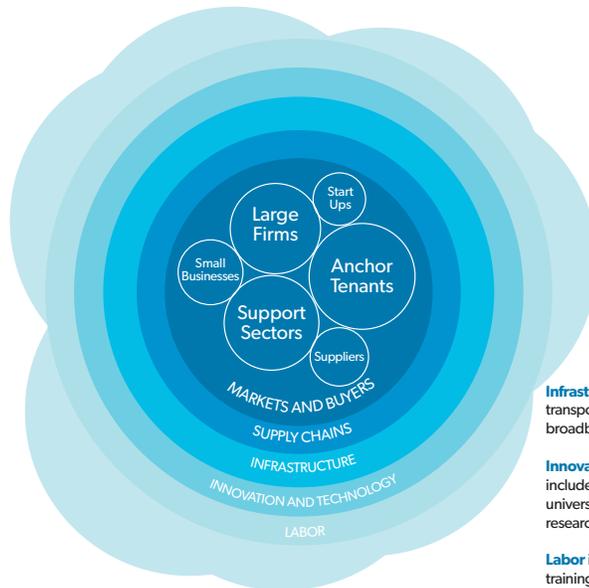
Individual Firms  
 Employers as Customers  
 System or Institution Driven  
 Statewide Top-Down or Too Local  
 Wishful Thinking  
 Focus on Workforce Only  
 Problem Driven  
 Target Populations First  
 Representation Oriented  
 Futile Search for Consensus  
 Organizations and Jurisdictions  
 A Mysterious, Unique Occurrence

## THE SECTOR-CLUSTER CONNECTION



### INDUSTRY CLUSTER

An industry cluster consists of large and small firms in a single industry. Firms in industry clusters benefit from synergies of association related to shared labor, sources of innovation, suppliers, markets, technology and infrastructure.



**Infrastructure** includes transportation, utilities, broadband, etc.

**Innovation and Technology** includes access to university and federal lab research and development.

**Labor** includes education and training systems graduating jobseekers with skills for entry-level, mid-level and advanced-level occupations.

Adapted from National Governors Association, The Woolsey Group

## GETTING THE SCOPE *JUST RIGHT*

Ask yourself:

### **Is the Geography right for this partnership? Too big, too small? Just right?**

- Too big: A whole state. Half a state. (Hint: put some parameters on your geographic reach like: strong identity for this industry in a particular area, like along a Highway corridor? Is this reach manageable, i.e. will we actually interact and encourage interaction?)
- Too small: A neighborhood (Why not? Because you won't get the depth and breadth you need to really address a target industry's needs)
- Just right: Start with your target industry's natural labor market region with parameters that will actually allow for a collective identity and employer-to-employer interaction. The geographic reach may expand or narrow over time.

### **Is the Scope of Industry right? Too broad, too narrow? Just right?**

- Too broad: "Advanced Industries" defined as any industry that uses some advanced technology (bioscience + aerospace + IT, etc). (Why not? You're taking on the world!)
- Too narrow: Tortilla Manufacturers. Physical Therapy providers. Trucking companies. (Why not? You'll end up with one short-term solution, not a partnership.)
- Just right: Advanced Manufacturing. Food & Beverage Manufacturing. Healthcare providers. Transportation and Logistics. (Why? Breadth and Depth)

### **What about employer champions? Membership? What is too big, too small? Just right?**

- Too big: 150 employer champs at your launch meeting!
- Too small: 2 employer champs at your launch meeting! (if this happens, just have a conversation with them, ask them to help you build an invite list).
- Just right: Aim for 25-30 champs at your launch meeting, be happy if you get 10 or more. Aim for a broader employer membership of much bigger: 30-80 members, and over time expect to reach all or most of companies in your region and target industry, even if they are not active champs or members.

### **Are we expanding beyond our own jurisdictional boundaries?**

- Don't just be a LWIB, economic development agency, college or single organization doing this work.
- Do expect that your support or partner team will be multiple lwibs, economic development agencies, colleges and other organizations.
- Do expect to cross city and county lines (no sector partnership is actually in just one if they're really looking at their natural labor market).

# B

## PREPARING TO LAUNCH YOUR SECTOR PARTNERSHIP

### DESIGNATE A SECTOR STRATEGY CONVENER TEAM

While your regional sector strategy team may be much larger, you will need a smaller core group that takes responsibility for convening employers. This is an essential task that will determine the success of your sector partnership. It requires people who are collaborative, disciplined, and are “finishers.” The convener team must be able to do the job or be able to find the right people to get the job done. They must be able to put aside personal biases and organizational agendas to facilitate and support the deep engagement of employers that will be the key to launching a sector partnership.

### FOCUS ON CIVIC ENTREPRENEURS

Engaging employers for a sector partnership involves much more than creating a list and sending an invitation to the company, asking for a representative to attend a meeting. Instead, you are on a mission to find a certain kind of leader, one who not only understands the strategic direction and has decision-making authority at his or her business, but who also has demonstrated the characteristics of a “civic entrepreneur.” A civic entrepreneur is driven by opportunity, entrepreneurial in approach (both risk-taking and persistent), operates collaboratively, and is motivated by the belief that the long-term success of his/her company and prosperity of the community are interdependent.

### IDENTIFY AND RECRUIT EMPLOYER CHAIRS

With your focus on civic entrepreneurs, it is now critical that you identify and secure employer chairs. Your goal should be to identify one or more civic entrepreneurs who will agree to, at a minimum, chair the launch meeting for a sector partnership. If you can secure the commitment of employer chairs who are willing to lead the launch phase (say three to six months), that is even better. Ideally, one of your employer chairs should host the meeting at their place of business, with one or more of them working with you to tap their networks to identify other civic entrepreneurs in their industry, sign the invitation letter, and send an encouraging reminder email to invitees. Also, it can work well to secure both an established civic entrepreneur and an emerging leader as co-chairs.

NOTES

### BUILD THE LIST OF POTENTIAL EMPLOYER CHAMPIONS

Working with your civic entrepreneur employer chair(s), create a list of sector employers and civic entrepreneur leaders from those employers. Your goal is to create a critical mass of civic entrepreneur leaders to ensure that there will be enough champions to step forward to drive a sector partnership. Our experience is that a core of 15-25 works well, but even 5-10 of the right people can catalyze a sector partnership. Once a critical core is identified, then you can build out the list with business leaders who may or may not be civic entrepreneurs yet, but who are from important employers and could be positively influenced by the civic entrepreneur leaders you have identified.

### MAKE THE RIGHT ASK AND FOLLOW UP

The best ask is employer-to-employer, civic entrepreneur-to-civic entrepreneur. The ask should be straightforward: it is essential that we as an industry work together on key issues and opportunities, and team up with community partners who want our industry to be successful for the good of our region. And, we want your personal involvement because you are a leader in our industry. Note what is not part of the ask: an invitation focused on identifying workforce needs or another specific pre-determined topic, or an invitation that treats the employer as a customer. This is about convening employers on their terms, without a preconceived notion of what the outcome will be. That means that you and the employers will need to have a tolerance for ambiguity, because until the employers have an opportunity to identify their priorities, it would be premature to pre-judge the outcomes.

### NOTES

## CIVIC ENTREPRENEURS ARE THE KEY

### FUNDAMENTAL LESSONS

Regions Take Responsibility  
(Collaborate to Compete)

Sectors/Clusters Drive Regional Economies  
(Build on Strength)

Collaboration Links Economies and Communities  
(Feed the Vital Cycle)

Recipe More Important Than the Ingredients  
(Every Region Can Succeed)

Civic Entrepreneurs are the Catalyst for Progress  
(Focus on People and Relationships)



## ROLES PLAYED BY CIVIC ENTREPRENEURS

### STAGE 1: INITIATION *(Motivators, Networkers)*

Civic entrepreneurs **motivate** themselves and others to look at their community differently. They personally demonstrate for others a new level of responsibility for the future direction of their community. They **network** among their friends and then move beyond their comfort zone to connect with other leaders in the community who are critical to starting a process of change.

### STAGE 2: INCUBATION *(Teachers, Conveners)*

Civic entrepreneurs help **educate** their community, preparing it for participating effectively in a collaborative process of change. Once a foundation is built, some become **conveners** of a fair and effective decision-making or incubation process, ensuring that it involves a diverse cross-section of the community and operates according to clear rules and with a strong discipline that drives for results.

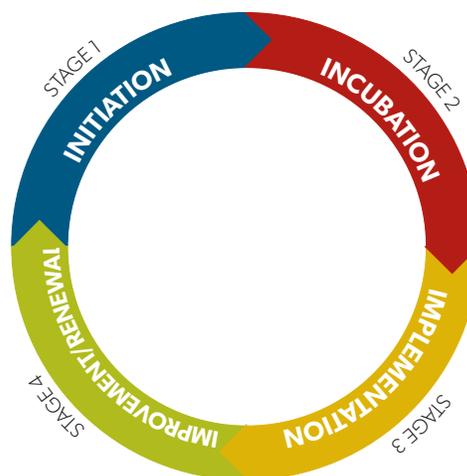
### STAGE 3: IMPLEMENTATION *(Integrators, Drivers)*

As **integrators**, civic entrepreneurs recruit expertise, locate resources, and otherwise assemble the necessary ingredients for successful implementation of tangible initiatives. As **drivers**, they ensure that measurable objectives are set and reached, that implementation efforts avoid fragmentation, duplication or rigidity in approach, and that the focus remains on challenging objectives.

### STAGE 4: IMPROVEMENT/RENEWAL

*(Mentors, Agitators)*

As **mentors**, civic entrepreneurs help establish organizational platforms for the community to continue working together on important issues. As **agitators**, they fight complacency by constantly reminding people that change is a continuous process.



Adapted from Doug Henton, John Melville, Kim Walesh, *Grassroots Leaders for a New Economy*, pp. 75-79

## SAMPLE SECTOR PARTNERSHIP LAUNCH INVITATION – NON-EMPLOYER PARTNERS

Dear Sector Strategy Partners,

As you know, as a result of the teamwork at the CO Sectors Summit in January this year, we are **targeting manufacturing, healthcare and tourism/hospitality for new sector partnerships in 2013**. Now that we have Energy already up and running, it's time to tackle our next target industry. That will be manufacturing. Thanks to all of you who have already given us input and commitments to make this launch a success.

Lisa McCabe, Gary Kellogg, Ed Roe and I have worked out a plan for **May 9th at the Springfield Valley Chamber to launch the new Advanced Manufacturing Partnership**. We have arranged for Gary and Ed will make opening remarks, including presenting some key (but short) data related to the strength of manufacturing in our region, and including an overview of what a sector partnerships is and can be for our region's manufacturing. Lisa will facilitate the meeting, and will help make sure that employers in the room do most of the talking. This partnership is about their needs.

The time for the **Launch meeting will be 2-5:00 pm**. I've attached a draft invite to company partners that we are using to recruit participants, and that we hope you can use (feel free to tweak) to help us out.

**We need your support to make this successful.** A number of CEO's have been contacted already including Rick Carter (Valley View), Alex Villa (WARMC), Dana Ellerby (HRMC) and Brian Turney (KRMCC). These individuals will help identify and recruit other companies to participate. We have also created lists of companies in our area to contact based on the NAICS codes we are using to define advanced manufacturing in our area. We'll need your help to do outreach and issue invitations. Our goal is to issue 50 invitations, and have 25 confirmed participants by April 25th. Lisa and I will follow up with you individually to ask for help with specific companies and to find out which companies you already have in your rolodex.

**Your role at the Launch meeting will be 1) to represent your program and organization, simply by being there; and 2) to listen.** This meeting, and the ongoing meetings and activities of the partnership, will be employer-driven. Our goal will also be to encourage employers to be active partners going forward. Our collective role as non-employer partners will be to listen and understand the biggest growth opportunities for advanced manufacturing in our region, and coordinate to tackle strategy areas that will yield the highest impact for companies and workers. This partnership is not a one-time deal; it is intended to be a long-term approach to working with our manufacturers.

Please let me know if you would like to discuss further, and if you can attend. I can be reached at (234) 765-9876 or [jen.dorrey@cityofspringfield.gov](mailto:jen.dorrey@cityofspringfield.gov). I look forward to hearing from you regarding Springfield Valley AMP participation.

Warm regards,  
Jen

## **SAMPLE SECTOR PARTNERSHIP LAUNCH INVITATION – EMPLOYER PARTNERS**

Dear Brian,

This is a follow up to the message I left earlier about the launch meeting of our new Springfield Valley Advanced Manufacturing Partnership. The AMP is being co-sponsored by a collaborative group of private and public organizations that have joined together to facilitate the growth of our region's manufacturing industry. Here are some details about the agenda and outcomes.

The May 9th meeting is intended to “launch” a public-private partnership focused on manufacturing for Springfield, Jones and Macomb Counties. This stems from the realization that manufacturing in our area is a critical driver of our economy. Manufacturing provides X jobs to our community, shows considerable staying power based on past and projected growth, and a relatively high concentration of firms than other areas around the country. We want to explore this, and find ways to collaboratively leverage the growth opportunities for your industry.

We are modeling our partnership after successful sector partnerships around the State and across the country. Sector partnerships can be a place for companies to collectively address issues related to competitiveness and growth; a single table at which to work with multiple public programs; and an opportunity to help create solutions to pressing issues. They are among the few initiatives with evidence showing benefits to companies and firms, as well as workers and jobseekers. Companies report increased networking power within their cluster, increased productivity, reduced turnover, and even new product lines or innovative business ideas. These partnerships often focus on workforce development issues, and where that happens workers tend to benefit from accurate training for the job, increased attachment to jobs, and better earnings.

The anticipated outcome for the Launch is to come away with industry-determined priorities for action and formation of teams to pursue these priorities with community partners. Industry leaders will determine the priorities and champion the teams. Community partners such as workforce development, education, economic development, and others will be there too. They will be in “listening” mode. I know they will appreciate hearing and better understanding the growth opportunities, and needed actions to leverage those opportunities, directly from you.

This partnership will be all about action. We anticipate that workforce issues may be targeted, but also expect an array of other priorities related to business growth to emerge. We expect to come out of the meeting with an industry-stakeholder team ready to collaborate on next steps. None of this can happen without industry input.

The May 9th meeting will be a 3-hour commitment, from 2:00 to 5:00 at the Springfield Chamber. We realize this is a big ask. We think this is a big opportunity. We hope you join us.

Please let me know if you would like to discuss further, and if you can attend. I can be reached at (234) 765-9876 or [jen.dorrey@cityofspringfield.gov](mailto:jen.dorrey@cityofspringfield.gov). I look forward to hearing from you regarding Springfield Valley AMP participation.

Warm regards,  
Jen



## HOLDING THE LAUNCH MEETING

### CHOOSE A DISCIPLINED PROCESS (THE HOOK)

There is no one right process to use in the employer launch meeting. However, do spend time on this choice, and choreograph how it will play out. Choose a disciplined process that allows the collective employer voice to emerge. This first meeting is the hook--employers must see a reason to commit to a next step. Based on years of experience with many different processes, we offer a set of design criteria and a preferred approach. Whatever approach you choose, it should be designed to have employers identify opportunities for sector growth, priority requirements for capitalizing on these opportunities, and employer champions for those priorities, who are willing to take a next step after the launch meeting. It is essential that by the end of the meeting, there is a shared product (priority opportunities, requirements, and champions) that is the employers'--and not anyone else's--agenda. To this end, it is best if community partners are good listeners during this meeting, giving employers the opportunity to be heard. Our preferred approach--which we will simulate in this training--combines these elements in a way that has proven to be effective with civic entrepreneurs.

### START WITH OPPORTUNITY

Always lead with opportunity. By starting the launch meeting with a focus on opportunities to grow our industry in this region, employers are immediately put in a frame of mind that is conducive to working together on shared aspirations. In contrast, if the launch meeting starts with a listing of problems or needs, it can trigger the "blame game" or position employers as customers who are being asked to purchase solutions to their problems from the community. It can also trigger non-employer partners to try to answer all their questions ("We have a program for that."). This is not the time for that conversation. What is on their horizon, what are they working towards as a business, what forces are at work that are creating opportunities for growth in this region? Opportunities can come in many forms (and it is okay to provide examples): new and expanding markets, new technologies and products, changes in government policy. Remember: the focus should be on opportunities first, before deciding on actions. A collective view of opportunities becomes the rationale for working together with the community on ways to unleash the potential for business growth and community prosperity.

### NOTES

### MOVE TO REQUIREMENTS FOR ACTION

Identifying opportunities is a necessary but insufficient condition for the successful launch of a sector partnership. After establishing that there is a strong rationale for action through the identification of opportunities, employers should then be asked to focus on the top requirements to capitalize on those opportunities. This discipline focuses them on the most important actions, not just “nice to have” changes or secondary issues. Again, you can provide examples: workforce/talent, infrastructure, innovation, capital access, regulatory process, export assistance, and others. The focus should be on priority actions that they could take in partnership with the community, not on actions that public or community programs should take independently or that someone else should take outside the community (e.g., federal or state government).

### ASK FOR CHAMPIONS AROUND PRIORITIES

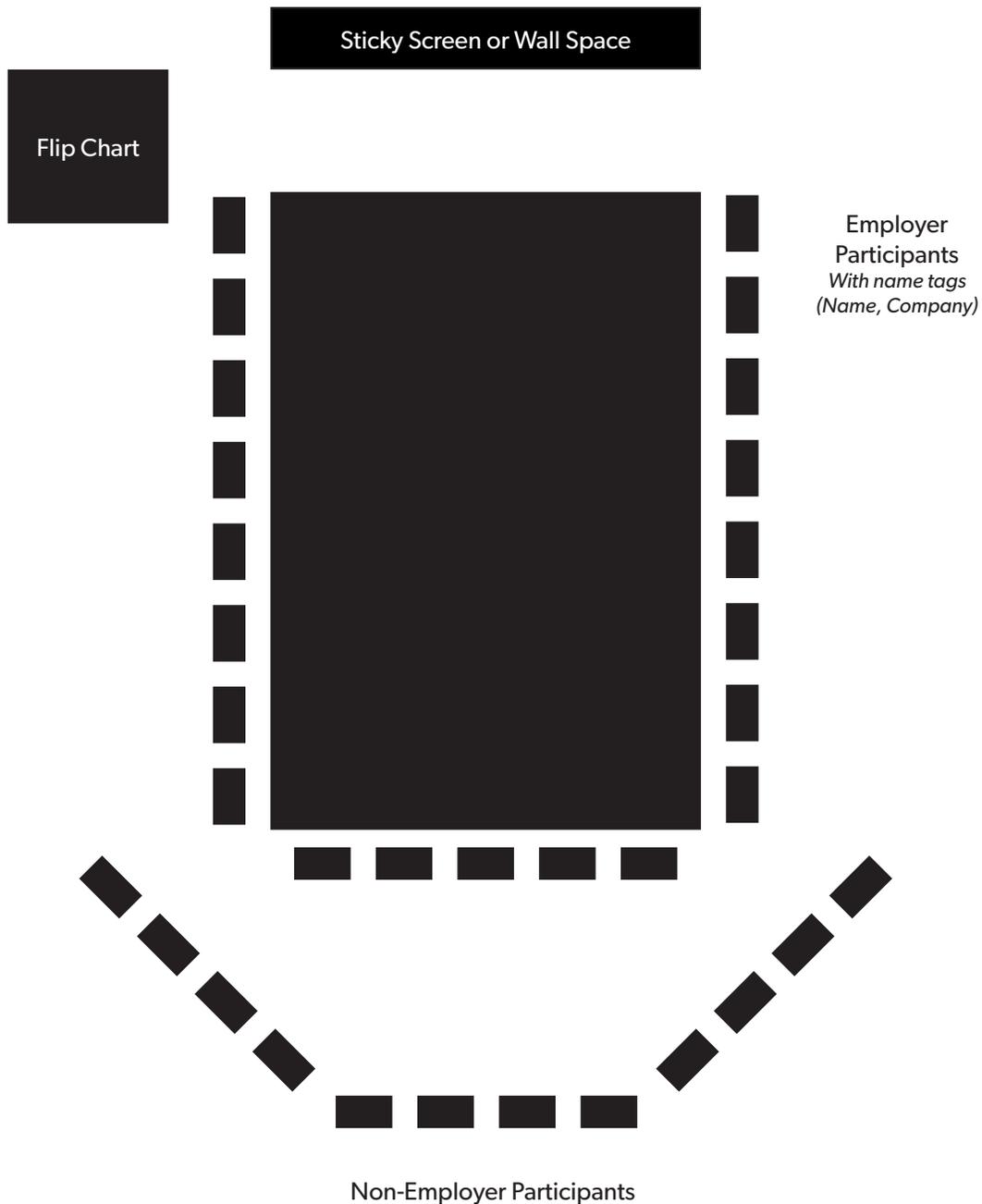
If the priority opportunities and requirements have been effectively identified, then the employers have created a shared rationale for collaboration and set of priority actions to be taken. It is typically at this point when employers start seeing a real vision for change and support. It is at this point therefore where there needs to be a call for champions. This launch meeting was not a paper exercise, but rather a necessary first step towards action. The next step is for individuals to volunteer to flesh out major priorities for action, get more specific about actions and measurable outcomes, and agree to bring back these refinements at a second meeting. This step also is a further reality check on what employers really believe is most important. Make clear that the sector partnership will only proceed with what the employers agree to help champion. No champions, no initiative. Also, make the point here that the convening team will now help identify the appropriate community partners who are willing to work with employers on specific priorities.

### AGREE ON A CLEAR NEXT STEP

There are many next steps that are possible and effective, but most importantly the next step should be clear and immediate. In fact, saving a few minutes at the end of the meeting to clarify the best next step is a good idea. A next step will include a meeting summary (i.e., their shared product of priority opportunities, requirements for action, and champions). It should include an in-person or virtual meeting by conference call of champions focused on specific action priorities--something that should happen within 30 days. Line up an employer champion who will host the call or meeting, and help record the results. Then, within 60 days, hold a second sector partnership meeting.

### NOTES

## SAMPLE MEETING SETUP



### ROOM SET-UP

- Employer participants should sit at the big table or at the front or at the center somehow
- All non-employer partners should sit around the employers -- this matters.
- The conversation at this meeting is about employers, by them. Public partners are listeners.

### MATERIALS

- Colored markers
- ½ sheet and full sheets of paper (colored paper works best)
- Flip charts, easels
- Tape or an adhesive to stick papers on wall to display
- Large sticky notes

## SAMPLE AGENDA FOR LAUNCH MEETING

Please use this sample agenda exactly as is, or just for inspiration! Don't be nervous about asking employers to roll up their sleeves! This exercise is pretty refreshing and engaging to them.

**5 minutes**

### WELCOME

- a. Name your facilitator
- b. Thank everyone for being here and having a certain "tolerance for ambiguity"
- c. Round of introductions

**5-10 minutes**

### BRIEFLY DESCRIBE WHAT YOU'RE UP TO

- a. You are launching a sector partnership in this industry, in our region because this industry really matters to our regional economy... (Use your "Sector Partnership Primer" from your Summit materials for talking points)

- b. Important talking points

*This only happens with industry engagement!*

*We can only focus on your industry with your help to drive and champion the agenda, and to implement the strategies developed collectively to support the growth of your industry.*

**30-60 minutes** **TALKING ABOUT OPPORTUNITIES**

- a. What are the big opportunities for your industry?
- b. Push the conversation to what are the big opportunities "in our region specifically", i.e. what are the big opportunities for this specific industry (sector) here in our region.
- c. Discuss openly, energetically for 10 minutes, then start writing them down.
- d. Your Choice (you will need markers):

*Write for all to see on flip chart; or*

*Have participants write their big opportunities on a 1/2 sheet or whole sheet of paper and actually stick them up on a wall (you can use a giant piece of parachute fabric sprayed with adhesive spray and tape to the wall -- it's very useful). As the papers go up on the wall, cluster together the ones that are similar. You'll end up with 4-5 clusters of big opportunities.*

**30-60 minutes** **TALKING ABOUT REQUIREMENTS** - What is it that we need to collectively tackle to leverage these opportunities? What would matter most? What would warrant our collective action? What can we do?

- a. Discuss openly for 10 minutes, and then start getting them in writing.
- b. Write requirements down! Flip chart these or write on paper and post to the sticky wall. Ask them to come up with 2-3 or more if they can. Cluster the similar requirements together again. You'll end up with 4-5 strategy areas.
- c. 10 minutes- Discussion about the strategy areas

**30 minutes**

### THEN MOVE INTO COMMITMENTS

 - Use big sticky notes for this and one person at a time

- a. Ask them to stick their names on strategy areas that they can "champion" -- i.e. help drive what happens in that area. They can choose more than one!
- b. Then with a different color sticky note, ask them to list out peers, other companies, names of people that should definitely be involved that aren't here today -- stick those up on the wall. This is about getting them to help with recruitment.

*You may end up with a strategy area with no names, no commitments. This is telling! It means it's not a priority right now. It may come back later, but right now this is not an area to be championed and prioritized. This is a good thing! This is a way to naturally prioritize and cull the initial workload.*

**10 minutes**

### WRAP-UP, NEXT STEPS & THANK YOU (BE EXCITED!)

Next steps

*Those whose names are on strategy areas should get together, discuss a course of action, and present it back at the next meeting*

*Send invitations to those missing from the table*

*Set a date for next meeting*

# D

## ORGANIZING THE AFTERMATH

### IMMEDIATELY EXPAND THE CIRCLE OF EMPLOYERS

Despite your best efforts, some civic entrepreneurs on your list will not be able to make the launch meeting due to scheduling conflicts. You should reconnect with them, and give them a chance to see the results and join others as a champions. For those who did attend the meeting, ask them to identify at least one more civic entrepreneur like them, so they can be recruited to the effort. In fact, you might ask them when they volunteer as champions at the launch meeting to identify one additional civic entrepreneur they know who would be a good fit and that they will help recruit as a champion.

### GIVE SPACE FOR THE EMPLOYER VOICE TO EMERGE

There will be a tendency at this point for community partners, with the best of intentions, to take over and drive action, not wanting to impose on the employers. While well-intentioned, this is a formula for failure. If community partners exert themselves too much, employers will recede in terms of engagement. At this critical moment, community partners must give enough space for the employer voice to emerge and solidify their engagement as partners, not customers.

### BUILD COALITIONS OF THE WILLING AROUND PRIORITIES

While expanding the employer circle and giving space for the employer voice to emerge, you should also be identifying community partners willing to work with employers on their terms. Not every potential community partner is well suited to this role. Some want to sell employers a product or solution, others push their own agenda, and still others are not willing to do the sustained work necessary to follow-through to action. Fortunately, your goal is to assemble “coalitions of the willing” around the priority areas for action. Don’t waste your time trying to repeatedly convince people or institutions to participate. They may come along later anyway when the sector partnership begins to show some success. In fact, they might even say it was originally their idea! You may also find that some employers originally at the table drop off. When this happens, don’t panic, but keep them informed of your progress. Be mindful that your sector partnership will not be all things to all people, and some will opt out. Others will opt in. Your goal is to keep the priorities and actions focused on what the collective employer group wants to focus on.

### NOTES

### STAY AGILE AND OPPORTUNISTIC

Once the sector partnership gets rolling, you will be surprised what opportunities for action will present themselves. The challenge will be to remain agile and opportunistic without losing focus and dissipating your momentum. Try to prioritize opportunities to leverage current priorities over completely new initiatives. Continue to be employer-driven and community-supported, a partnering arrangement that will help maintain discipline in considering new opportunities. Build teams of civic entrepreneurs that can weather changes better than super-champions that provide most of the leadership but would seriously compromise the effort if they for some reason could not continue.

### CREATE JUST ENOUGH ORGANIZATION

Form should always follow function. Or, put another way: create only just enough organization for your current stage of implementation. If you over-reach, and spend more time on organization than action, you risk inciting turf wars, resource struggles, and other distractions from the most important tasks at hand. You risk driving away the employer civic entrepreneurs, who will sense the dysfunction and move on. Put more positively: you attend to organization, but do so in a measured, demand-driven way, consulting with your employer partners and being open to continuous improvement.

### NOTES

## SAMPLE MEETING SUMMARY

### Region X Light Manufacturing Sector Strategy

The Region X Light Manufacturing Sector Strategy Team met on December 18, 2012, identifying priority opportunities and requirements to grow the sector in Region X. The Team identified the following priority opportunities to grow the sector:

- Serve growing, diverse markets for recreation equipment, wine industry equipment, machine tools, mining equipment, and others
- Capitalize on existing strengths and growing market for unmanned aircraft systems (UAS)
- Capitalize on new opportunities for re-shoring manufacturing from abroad, expansion of firms headquartered outside region, new entrepreneurial manufacturing firms, and integrated teams of local firms to compete for large procurements.

To capitalize on these promising opportunities to grow the sector in Region X, the Team then identified three priority areas for action, with private sector individuals volunteering to be initial champions in each area;

- *Expand the local pool of qualified manufacturing workers:* Focus on both top-level talent development (e.g., senior avionics engineers, managers) and mid- and entry level workers (e.g., cnc machine tool operators, welders, machinists), creating integrated approach to preparing the local manufacturing workforce (high schools, Region X College, Embry Riddle) and attracting and retaining talent (e.g., job fair). **Initial champions: Karen, Ginger, Norela, Lane, Paul, Robin.**
- *Promote manufacturing entrepreneurship:* Encourage young entrepreneurs with new/creative ideas, helping them access to investment capital. **Initial champions: Robin, Jim, Al, Casey.**
- *Promote Region X as a manufacturing hub:* Research and determine the nature and size of each niche manufacturing segment, develop regional marketing to get the County on the map, and create an ongoing mechanism for manufacturing sector communication and collaboration. **Initial champions: Tom, Robin.**

Next Steps: 1) Priority teams refine action areas, including short term and long term actions with measurable goals that can be taken; 2) Conference call January 21st at 3:00 p.m. to assess priority refinements and determine immediate action; 3) Next meeting February 26th, 3:00 p.m.

## THE GREEN ALLIANCE COMMITTEE

In a rural area of western Pennsylvania, the Private Industry Council of Westmoreland-Fayette convenes the Green Alliance Committee, a sector partnership focused on energy efficiency related manufacturing. The partnership began with eight employers. Their immediate shared priority was the immediate training needs of solar, wind, and geothermal component parts manufacturing, as well as a growing commercial and residential retrofitting sector. Over the course of one year, employer members brought other employers to the table, and the number of companies involved grew to more than 40. It is now an active sector partnership including elected officials, economic development entities from four counties, and local community colleges. Its primary areas of focus are:

1. Training new and incumbent workers and
2. The growth of the regional energy-related manufacturing cluster.

Private sector members report that the committee's value is its networking power. It is a forum for sharing, joint policy creation, and practical problem solving related to common issues of competitiveness. Participating companies have entered into shared purchasing agreements that reduce costs for local materials, significantly increasing the market for local suppliers.

- Retrofitting companies have added new positions based on their ability to secure contracts for retrofitting schools and hospitals because of their newly trained workers. A small commercial HVAC company quadrupled its workforce as a result of expanded connections to residential retrofitting needs.
- A manufacturer of vermiculite, a material used to insulate batteries, discovered through the alliance that the material could be used in retrofitting insulation, as well as in green soil for potted plants and gardens.
- A steel fabricator discovered an expanded market in windmill towers, based on new connections with wind power parts suppliers.
- A small woodstove pellet manufacturer connected with oil and gas drilling companies via the alliance and proceeded to research uses of wood pellets as an absorber of waste products, thereby creating an entirely new product line in a significant market. That firm expanded from five employees to almost 30 and now purchases sawdust from sawmills in three counties.
- Another member makes Pyrex glass for solar panels. Via the alliance he added an entirely new production line to meet regional demand, creating 60 new jobs. In its first 18 months, over 150 new jobs were created out of a sector partnership originally focused on short term training issues.



# E

## TRANSITION TO IMPLEMENTATION

### ESTABLISH LEAD EMPLOYER CHAMPIONS

One of the first tangible steps that moves the sector partnership beyond the “sorting out” period that immediately follows the launch meeting is securing the commitment of individuals as “lead employer champions.” Up to this point, there have been groups of employer champions working together around priority areas for action. Some of these employers have likely emerged as natural leaders of these groups, and other employers seem to respond to them. Now is the time to ask them to take responsibility as leads to work with their groups to transform the ideas developed thus far into a written action plan, ready for implementation. Also work with them to identify additional employer champions to recruit onto the team, and to consider forming an executive committee to take responsibility for decisions regarding the broader sector partnership.

### BRING IN COMMUNITY PARTNERS WHO ARE CIVIC ENTREPRENEURS

If the employer champions have had sufficient time to “find their voice” and get clarity around outcomes and strategies in key areas for action, then it is time to begin teaming them with community partners that can help refine the strategies identified and build an action plan. Use the same approach used to identify and recruit employers: find the civic entrepreneurs, those who have the creativity and persistence, as well as the collaborative personality and willingness to work with employers as partners (not customers). The biggest pitfall at this point is adding community partners that are pushing their own agenda, selling their own programs, or are unable to follow-through as partners because they do not have decision-making authority within their own organizations.

### USE THE DISCIPLINE OF ACTION PLANS

It is time to use the discipline of a written action plan to turn the good ideas generated at and after the launch meeting into an integrated set of measurable outcomes, key strategies, and specific actions and partner commitments to deliver results. The action plan can take many forms, but should include outcomes, strategies, actions, commitments (with the names of those taking responsibility for delivering on those commitments), and a timeline. By adopting this discipline, the team will quickly determine what is most important, get greater clarification on specific outcomes and strategies, and strengthen the connections from outcomes through to commitments. The team will either deliver an action plan they can commit to implement or will not be able to agree on a solid written plan, which means that potential area of action is not “ready for prime time” or that the cast of champions is not the right mix to take the ideas forward.

### NOTES

### FOCUS ON EARLY WINS AS MOMENTUM BUILDERS

While assembling an action plan, make a focused effort to identify “early wins”--tangible, achievable, short term actions that will begin delivering results. The reason to define and execute on these modest steps is not to declare victory and move on, but to use those small wins to build momentum for more ambitious, longer-term actions. What this means is that not all early wins are created equal. Focus on early wins that are first steps of a longer-term strategy versus early wins that are simply activities (e.g., holding meetings, creating a website). A good way to think about early wins: identify a “prototype” of something that you ultimately want to do in a bigger way, or a “required first step” for a larger strategy (e.g., a quick synthesis of top training needs, a mapping of the permitting process) rather than “pilots” or “activities” that are achievable but not strongly connected to the larger strategies and, thus, unlikely to build momentum.

### IDENTIFY AND ASSESS ORGANIZATIONAL OPTIONS

During the transition stage, with the development of written action plans, now is the time to identify and weigh the options for choosing or creating an organizational “platform” to support the work of the partnership. There are many options to consider (see table of examples). There is precedent for sector partnership organizational “homes” at workforce investment boards, economic development organizations, community colleges, industry associations, local government, or other community-based organizations. There is precedent for creating new organizational entities, choosing an existing entity, or developing an agreement among several entities. There are both potential advantages and disadvantages of every approach, and there are no cookie-cutter answer for all situations. An clear-eyed, honest, and thoughtful assessment of these options will help frame the decision.

### NOTES

# F

## SUSTAINABLE IMPLEMENTATION

### ESTABLISH AN ORGANIZATIONAL HOME

Review options and weigh alternatives and come to a thoughtful decision about an organizational home for the sector partnership. If choosing an existing organization or consortium of organizations, clearly document in writing the “terms of engagement” and responsibility of the host entity or entities. A potential pitfall at this point is the willingness of an organization to take on this responsibility, but without a firm commitment about what that means, only to fall short of expectations later. If creating a new organization (e.g., a new non-profit), that option often takes more time than people imagine, so make sure there is a temporary platform with one or more existing organizations, with explicit time-limited expectations about how the platform will be a bridge to the new organization. While this focus on organization would have been premature before this stage, it is now essential to ensure sustainable implementation of action plans and the sector partnership as a whole.

### KEEP EMPLOYERS IN THE DRIVER’S SEAT

The natural temptation at this stage is to “hand off” the work of the partnership to the community partners. Employers are “too busy” and “isn’t this the day job of community partners anyway?” This is a formula for failure, and not because the community partners are lacking in commitment or competence. Actually, community partners cannot be successful without employers remaining strongly engaged, because it puts the community partners back in the same bind as before: trying to guess what employers needs and are willing to do. Employers must remain actively engaged, although the nature of their commitment may change over time. Some employer champions, for example, may bring in some of their direct reports to help with implementation, while they play more of a leadership role. Remember: employers can remain in the driver’s seat in many ways, continuing to serve as co-chairs, lead employer champions, providing staff support in implementation, helping secure other resources to support implementation, or by playing other roles.

### NOTES

### REGULARLY DOCUMENT AND REPORT PROGRESS, AND MAKE ADJUSTMENTS

This documentation and reporting process must be built into the partnership as a formal, ongoing expectation, or the partnership will inevitably fall apart. Simply put, this process should be directly tied to the explicit outcomes and commitments of the partnership's action plans. It should be regularly reported and it should generate not only a celebration of successes, but a frank and open discussion about barriers to progress and changes that need to be made in the spirit of continuous improvement. Ultimately, if lack of progress continues to be a problem, the partnership needs to decide if the action plan and/or the implementation team needs a major overhaul or if the partnership needs to move on to other priorities. To be effective and sustainable long term, a sector partnership must be able to accelerate and "double down" on strategies that prove successful and rethink and redistribute resources and effort away from strategies that are not meeting expectations.

### ESTABLISH CRITERIA AND A PROCESS TO RESPOND QUICKLY TO OPPORTUNITIES

As a partnership moves into implementation, opportunities for grants and other support will appear, sometimes in large amounts. There is a real risk of becoming a grant-seeking organization, shifting away from employer-determined priorities in order to chase the latest "flavor of the month." At the same time, there is a risk that the partnership will become rigidified and unable to mobilize to respond to relevant opportunities. There is an alternative: establish a set of criteria for seeking and responding to opportunities that are tied directly to the goals and strategies of action plans and the partnership as a whole. Also, set up a fast-response process to evaluate opportunities and assign a team to pursue relevant opportunities. In this way, the partner can remain focused, yet agile when "natural allies" emerge that can help it advance its goals and accelerate or amplify its outcomes.

### EMBRACE ENDINGS AND BEGINNINGS

A partnership should do an annual review of its role and impact, and be an organization that embraces regular "endings and beginnings." This means recognizing when a particular initiative has run its course and can be ended with a celebration, redeploying if possible the resources and people to other priorities. It means thinking about succession, as individuals for a variety of reasons may need to change roles and levels of commitment. It also means being willing to consider new priorities, developed in the same rigorous way the original priorities were developed. And, it means choosing the right time to completely refresh priorities and rethink all aspects of the partnership

### NOTES

## GREEN LIGHTS

### THE DOMINANCE OF DOERS

The partnership is gaining more “doers” than “talkers”, with the former really driving priorities and action plans.

### THE CULTURE OF COMMITMENT

The partnership is increasingly operating with the expectation that all participants must contribute to, rather than take from, the effort.

### THE LEVERAGE OF LEADERSHIP

The partnership’s leaders are expanding their personal commitment, leveraging their networks for new champions, encouraging current champions to deepen their own commitments, and actively addressing the sustainability question.

### THE DISTINCTIVE DIFFERENCE

The partnership is getting clearer about its unique role as an intermediary between the sector and the community, distinct from existing industry associations and other partnerships.

### THE REALITY OF RESILIENCE

The partnership is showing that it can adapt and move forward as it faces inevitable obstacles in the transition to and early stages of implementation.

### THE REAPING OF REWARDS

The partnership is gaining traction, attention and financial support for its ongoing activities and services from multiple public (federal, state, county, program) and private sector (employers, foundations) sources.

## RED FLAGS

### THE SLIPPERY SLOPE

Business champions are getting increasingly quiet and disengaged, deferring to community partners who are increasingly treating them as customers, which only causes them to become further disengaged.

### THE SUPPLY-SIDE SUBSTITUTION

The community partners are increasingly pushing their agenda rather than supporting employer-driven priorities.

### THE AMBIGUITY ANCHOR

Business champions and community partners are having trouble getting specific about outcomes and actions, especially “early wins,” unable to articulate them in writing in the form of an action plan, “weighing down” efforts to transition to implementation.

### THE GRANT GAME

Partners are becoming more focused on grant-seeking than securing diverse financial and in-kind resources to support implementation of partnership priorities.

### THE TURF TRAP

Organizations are wanting to take over all or part of the partnership’s agenda, but are unwilling to commit to specific responsibilities in the form of a written memorandum of understanding.

### THE NARROWING NICHE

Partnership agenda is increasingly focused on a single priority (i.e. workforce training) rather than addressing a broader set of sector competitiveness needs, risking disengagement by employers who need more than one “what’s in it for me?” choice to stay in the game.

### THE DONE DEAL

Partnership agenda is feeling stale and redundant as a result of not periodically revisiting opportunities and requirements for sector growth.

### THE KEYSTONE CONUNDRUM

The partnership is increasingly dependent on a single leader—either an employer chair or convener—who plays an indispensable role. Without that individual, the partnership would lack the industry and community engagement needed to sustain itself. The trick for a sustainable partnership is a set of *important* but not *indispensable* leaders.

## FUNDING CONSIDERATIONS FOR YOUR SECTOR PARTNERSHIP

		Ongoing Support and Planning		Growth and Implementation of Partnership Solutions	
		What do others use?	What can you use?	What do others use?	What can you use?
<b>Actual \$</b> Financial Support		<p>Employer cash contributions</p> <p>Federal grants</p> <p>State grants</p> <p>County or city grants</p> <p>Foundation grants</p> <p>Fee for service</p>		<p>WIA formula funds: Title I core &amp; intensive; Title I On-the-Job-training; Title I training funds; Title II Adult education</p> <p>Other Federal funds</p> <p>State funds</p> <p>City/County funds</p> <p>Foundation grants</p> <p>Corporate giving grants</p> <p>Employer contributions</p> <p>Fee for service</p>	
		<p>Employers' time, meeting space</p> <p>Public Partner Staff time to help coordinate, set up meetings, agendas, minutes, outreach, follow through, strategy development</p> <p>Got multiple partnerships? Share the workload of coordination across public partners.</p>		<p>Employers' time, meeting space, equipment, trainings, expertise, marketing, etc.</p> <p>Public partner staff time; re-purposed staff time to formally lead/coordinate</p>	

## ORGANIZATIONAL SHIFTS TO SUSTAIN SECTOR PARTNERSHIPS

Examples of how various types of organizations have shifted their mission to support sector partnerships.

WIBs/Workforce	Economic Development	Community Colleges/ Education	New Organizations	Cities or Counties
<p>Blends, braids and leverages internal and external funding streams to increase flexibility</p> <p>Partners closely with economic development and clarify roles/ responsibilities, increasing authority to respond to real business needs</p> <p>Uses the WIB to institute a policy of using sector partnerships as organizing mechanism to serve critical clusters</p> <p>Repurposes business services staff to coordinate individual sector partnerships</p> <p>Other:</p>	<p>Shifts the business model to orient around critical clusters, bringing focus to business operations</p> <p>Dedicates staff persons to each critical cluster</p> <p>Blends, braids and leverages internal and external funding streams to increase flexibility</p> <p>Other:</p>	<p>Offers testing lab, incubator, and research facilities as part of partnership’s service menu (potentially offering fee-for-service testing labs)</p> <p>Keeps any university agenda separate from partnership</p> <p>Creates an arm’s-length Foundation to support partnership</p> <p>Blends, braids and leverages internal and external funding streams to increase flexibility</p> <p>Ensures communication between advisory boards and sector partnership</p> <p>Dedicates staff to supporting and convening partnership</p> <p>Other:</p>	<p>Business supported (via dues-paying membership or fee-for-service)</p> <p>Partners with public program to help staff the partnership</p> <p>Blends, braids and leverages internal and external funding streams to increase flexibility</p> <p>Other:</p>	<p>Uses influence of Mayor’s Office to bring programs together to co-convene</p> <p>Blends and braids multiple public funding sources to support partnership</p> <p>Dedicates staff to supporting and convening partnership</p> <p>Other:</p>