Georgia Power

Georgia Workforce Planning Guide

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Georgia Workforce Planning Guide

Contents

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Introduction

Workforce development plays many important roles in a local community. Effective strategies support prosperity for families, success for employers, and community growth. Workforce development connects individuals to opportunities for training or jobs in a local economy. A workforce development strategy is a coordinated set of actions and investments that seek to meet the most important workforce development needs of a community. The planning process can help a community shape its future, leverage resources, and create opportunities.

The Georgia Workforce Planning Guide is a collaboration between the University of Georgia's Carl Vinson Institute of Government and Georgia Power's Education & Workforce Development team. This guide will prepare community leaders with the steps, knowledge, and templates to develop and implement their own local workforce strategies, applicable to communities of all sizes and with varying needs.

Georgia Power

For over 100 years, Georgia Power has been dedicated to elevating communities by improving education and developing a strong talent pipeline. Experienced business recruitment and community development teams, highly skilled engineers, nationally recognized research analysts, and workforce development experts offer free consultation and services to help communities thrive.

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Since 1927, the Carl Vinson Institute of Government has provided customized assistance, research, and training to help governments perform more effectively and responsively, adopt innovations, and make better informed decisions. As a public service and outreach unit of the University of Georgia, the Vinson Institute takes the expertise and resources of the university throughout the state and beyond.

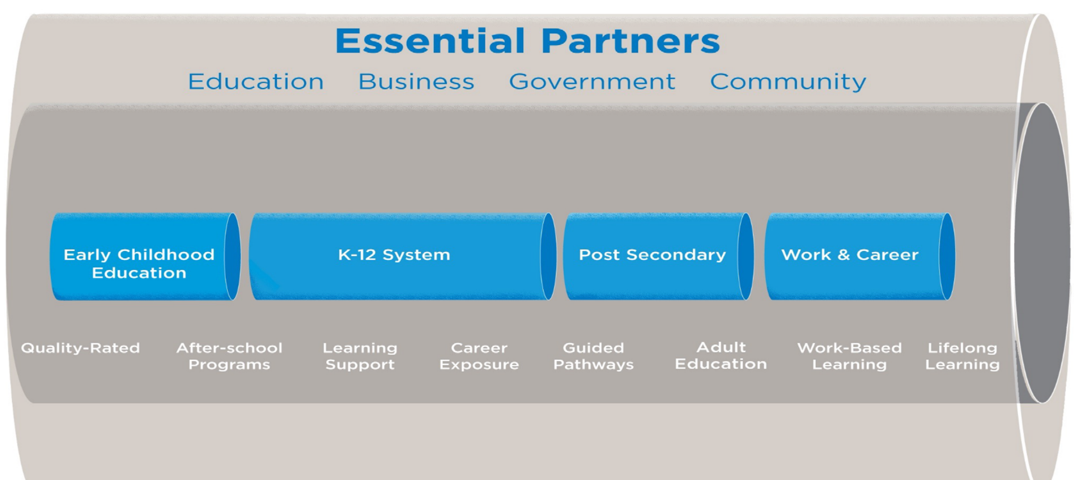
Workforce Development Overview

Workforce development involves many partners and programs aimed at helping students, job seekers, and employees gain the skills required to fill employment opportunities. Think of workforce development as a series of building blocks or a continuum that leads from education and training to a successful career. Early education and training activities have an impact on later programs and success.

Workforce development connects individuals to opportunities for training or jobs in a local economy.

The graphic below visualizes this workforce development pipeline; it will be critical that you take the entire ecosystem into account. The pipeline shows that a variety of organizations are critical to workforce success and that each makes distinct contributions to the overall process.

Workforce Pipeline Example



Adapted from "Insulating the Education Pipeline" from the Forum for Youth Investment

Workforce Development Planning 101

Workforce development planning is about assessing needs, identifying assets, determining gaps and needs, and developing a plan to address the most pressing needs. Prioritization is key so that the action items identified don't overwhelm the capacity of the partners.

A workforce development plan serves as the roadmap for your community, identifies action items for stakeholders, and helps communicate the community's vision. Workforce development is a long-term proposition, so a clear and mutually agreed-upon plan can help a community stay focused on success.

A workforce development plan serves as the roadmap for your community, identifies action items for stakeholders, and helps communicate the community's vision.

Values of a Quality Workforce Planning Process

Data Driven: The planning process should be data driven and include multiple sources such as labor market data, economic data, and input from local leaders.

Community Led: The process should be driven by local leaders from government, business, education, and the community.

Inclusive: Diverse voices should be involved in the planning, needs assessment, and development process.

Solutions Focused: The planning process should identify short-term and long-term action items that will make a positive difference for the community.

Implementable: An effective workforce development plan must be easy to implement, meaning that each action item will need to be considered from multiple angles (e.g., feasibility, budget impact, partner capacity, timeline).

Workforce Planning Process

The workforce planning process is designed to guide community leaders through successfully developing a community workforce development plan.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Assess Capacity, Readiness, Goals, and Logistics	Data Collection and Analysis	Industry and Community Needs Assessment	Vision and Priority Setting	Implementation Planning	Ongoing Progress Review

STEP 1 Assess Capacity, Readiness, Goals, and Logistics

Before launching a workforce planning process, community leaders must assess their capacity, readiness, and goals. These are important factors that will influence the ability of the community to successfully develop and implement a plan. If the assessment indicates that the community is ready, then community leaders will need to complete some pre-planning items before the initial meeting. The success of the process will depend on an honest assessment of capacity and completing all pre-planning activities.

Considered a Regional Approach

While many types of planning efforts tend to focus on the county or city levels, workforce development planning lends itself to a regional or multi-county effort. Employees cross county lines every day and employers rely on a multi-county labor shed. Taking a regional approach will allow you to meet the needs of more employers, influence a larger student and worker population, and have a larger impact.

Assess Capacity, Readiness, and Goals

Capacity, Readiness, and Goals Assessment worksheet

At this point in the process, you should assemble several community leaders to serve as the initial planning team. Ideally, you should include three to five leaders from business, government, economic development, and education who are willing to help coordinate. They should have relationships and standing in the community to recruit additional participants and supporters. The planning team members should use the questions on the *Capacity, Readiness, and Goals Assessment* worksheet (See Appendix) to gauge the community's ability and needs. The assessment may indicate that the community is ready to move forward or that it might not be the right time to undertake the planning process. If your community is not yet ready to move forward, then you can use the takeaways from the assessment to focus on improvement areas before starting the planning process in the future.

Pre-Planning

If your community is ready to move forward, you will need to undertake several planning steps before the first meeting.

1. Identify and Recruit Steering Committee Members

A key factor for a workforce development planning process is having the right community leaders at the table. They will assist in studying and providing insight and determining the path forward, and they will lead implementation of the plan. Community leaders will participate if they see benefits for their organization or constituency and if they share a similar vision for improving the workforce pipeline. Individuals willing to listen and collaborate across organizational boundaries are best suited to being part of the steering committee.

The composition of the steering committee will vary, but generally you should aim for 15–20 members who represent key organizations. Other stakeholders can be involved during the needs assessment process, and you may also consider expanding the steering committee during implementation. The initial planning team should conduct outreach to potential steering committee members. This usually starts with a phone call or in-person meeting to explain the process, the goals, and how they could contribute. The initial planning team member should follow up with additional information and the meeting dates.

Steering Committee Planning worksheet

Review the *Steering Committee Planning* worksheet (See Appendix) for guidance.

2. Determine Meeting Dates, Locations, and Topics

Another pre-planning task is to coordinate meeting logistics. The process usually consists of four steering committee meetings spaced out over several months. The first meeting should be scheduled four to six weeks in advance, and aim to have a meeting every four weeks thereafter. Identify all future meeting dates, and ensure that all members have the dates and times blocked off on their calendars. Meeting locations should be convenient for members to attend and have flexible options for setting up the room. The best room setup for collaborative planning activities would be several small groups to allow for discussions.

See the *Sample Six-Month Workforce Development Planning Project Timeline* (See Appendix) for a sense of the overall project timing.

Sample Six-Month Workforce Development Planning Project Timeline

3. Develop a Plan to Provide Project Staffing

A key success factor is to have sufficient support and facilitation assistance. The initial planning team will need to provide this support to the planning process.

The first role is the project coordinator, who should work with the initial planning team to coordinate logistics, take minutes, send out post meeting communication, track implementation, and help ensure overall success. It may be one person or shared, but there must clear responsibility for completing tasks. This position could be filled by a loaned administrative assistant from one of the key organizations, an employee from an economic development organization, or an independent contractor who works on the project on a part-time basis.

The second role is the project facilitator, who helps the group work together in a collaborative fashion. Ideally the project facilitator would work with the group but have no vested interest in any one strategy, industry, or organization. The project facilitator would work with the initial planning team to construct agendas for meetings, ensure content is ready for each meeting, and facilitate various activities and decision-making processes. You may consider securing the services of a third-party facilitator. If your budget doesn't allow you to engage an outside facilitator, you will need to identify someone who could do it on a voluntary basis or spread the job among the initial planning team.

STEP 2 Data Collection and Analysis

So, you finally have all (or most) of the stakeholders at the table, logistics have been worked out, and you are ready to get to work. The first question you might ask is: “Where do we start?” There are several options: one of the best ways to start an engagement is by sharing data so all participants have a common understanding of what’s facing the community. That being said, data can be overwhelming and impersonal, so they must be presented in a way that everyone can understand. You may want to pull a handful of data points about the community to begin with. If deep discussion on one topic leads to further conversations, you may then need to provide additional data.

Other Places to Find Data

- GeorgiaData.org
- Georgia Power resources (SelectGeorgia.com)
- Partner resources (local workforce development board, economic development organization, regional commissions etc.)

Data Collection

These data points can be broken up into three buckets: community demographics, education data, and, finally, existing workforce. Note that you do not have to look at all of the data points from each bucket, but be sure to pick a few from each area to get a comprehensive view.

Community demographics include things like the poverty rate, educational attainment, race, ethnicity, age breakdown of the population, median household income, and current population growth. This data is primarily found using the American Community Survey. You can also look at how the community is expected to change with regards to these demographics, including overall population growth or decline as well as the change in age structure and racial makeup of the community. The Governor’s Office of Planning and Budget regularly generates these projections.

Education data are a great way to evaluate what the community’s current workforce pipeline looks like and provide an opportunity early on to address any gaps that exist with the labor force. These data should include both secondary and postsecondary institutions.

- *Secondary education data* points may include the literacy rate, high school graduation rate, HOPE eligibility, or high school progression data. Most of these data can be provided by your local school district or from the Governor’s Office of Student Achievement.
- *Postsecondary education* data mainly consists of program enrollments and completions at local institutions, which can be found through the Integrated Postsecondary Education Data System (IPEDS) at the National Center for Education Statistics or your local institution.

Existing workforce data points include unemployment rate, largest or fastest-growing industries/occupations, percentage of eligible retirees, where people are commuting to and from for work, and occupational projections. These numbers typically come from the US Bureau of Labor Statistics and the Georgia Department of Labor.

Data Analysis

Data Analysis Guided Questions worksheet

Once the data points have been collected, it is important to discuss and analyze them. Use the *Data Analysis Guided Questions* worksheet (See Appendix) for potential questions to answer or conversations to have. Note that although different stakeholders may be interested in different data points, by having an open discussion about the data and what they mean for the community, the group can identify trends or gaps that can inform their plan. The group may identify a couple of key data points that it wants to work on. These can act as long-term key performance indicators (KPIs) for the community’s workforce plan.

Ground Truthing

Education and workforce data should not be analyzed in a vacuum. Behind all of those numbers are real people and local organizations, so use data as a starting point and build from there with focus groups, listening sessions, interviews, or other ways to get personal input. This additional input may confirm the points that the data revealed, or it may shed light on some weakness in the data and illuminate other ideas. Either way, it is important to hear from the community. The next step in the process will be to talk in more detail about how to gather that input and conduct a needs assessment.

STEP 3 Industry and Community Needs Assessment

A needs assessment can be conducted in several ways, including meetings, surveys, and interviews. Each approach has pros and cons, but here are two of the most popular ways to tackle this step and how they may be used together. No matter how you choose to approach the needs assessment process, you should involve a wide variety of stakeholders to ensure that all aspects of the community are represented. Additionally, it is important to remember that the needs assessment is about listening, as it can be easy to jump to problem solving.

Survey

The first option is a survey. This approach may seem easy, but for a survey to provide informative results, it must be done well. The survey must ask enough questions to really understand community problems while not making it so long that people stop responding. It must get to the right people, and the majority of those people must complete it. After several weeks of data collection, the results must be analyzed, which can be more difficult if including a lot of free-response questions. Multiple-choice questions will make the analysis easier and make it easier for people taking the survey. However, free-response questions will allow respondents to voice feelings that multiple-choice questions may not necessarily capture.

Stakeholder Presentations

Another option for assessing industry and community needs is a series of stakeholder presentations. The overall process is made up of several steering committee meetings, one of which could focus on stakeholder presentations. Ideally, this would take place at the second meeting and would be designed to facilitate open communication about the needs and desires of the community and its major industries. Some of the representatives may be steering committee members, while others may be invited specifically. The other big barrier is the fear of sharing information with competitors. If you can establish a safe space to share, you might be surprised by how many common experiences employers have across the community. This information is valuable for tackling individual needs while also moving the whole community in a positive direction. This sort of candid meeting can also be good for relationship building and acknowledging larger community issues.

As mentioned in the descriptions, both options have their pros and cons. Stakeholder meetings are often preferred because in-person communication tends to be much deeper and allows for additional conversation if needed. If you do not have feedback (via either method) from one or more key stakeholders, you may have to supplement with individual interviews or acknowledge the missing information.

Environmental Scan

After you have heard from all major stakeholders, you will want to identify major themes. When the needs assessment is done correctly, you will likely start to hear a lot of repetition in answers. Thus, try to identify the top four to six themes. From here, you will want to identify more specific opportunities or needs. The *Environmental Scan* worksheet (See Appendix) provides two potential frameworks to assess the community. Option one focuses on the current situation, assets, needs, and opportunities. Option two is a more traditional SWOT (strengths, weaknesses, opportunities, and threats) analysis. Once the analysis has been done, be sure to identify some highlights and capture them in the *Workforce Plan Template* (See Appendix).

Environmental Scan worksheet

Workforce Plan Template

STEP 4 Vision and Priority Setting

After you have completed the industry and community needs assessment process, the next step is to develop a shared community vision for workforce development and to set priorities to achieve that vision. This step in the planning process will help the steering committee establish a roadmap and focus on items that are key to closing gaps. Communities that effectively move the needle stay hyper-focused on only a few areas that will have the largest impact.

It is important to remember than any planning process is about prioritization. Your industry and community needs assessment will likely identify numerous items that require attention. Your partners and steering committee members have finite time and resources to implement the plan. The steering committee will be more successful if it can focus on a limited number of priorities. Groups that try to accomplish everything at once are likely to burn out.

Developing a Local Workforce Vision

A workforce development vision for your community helps to articulate what the future should look like for its workforce. It is an aspirational statement that shows the preferred future for the talent pipeline and workforce in the community. While an aspirational statement, it needs to be grounded in truth and guided by the development of the process.

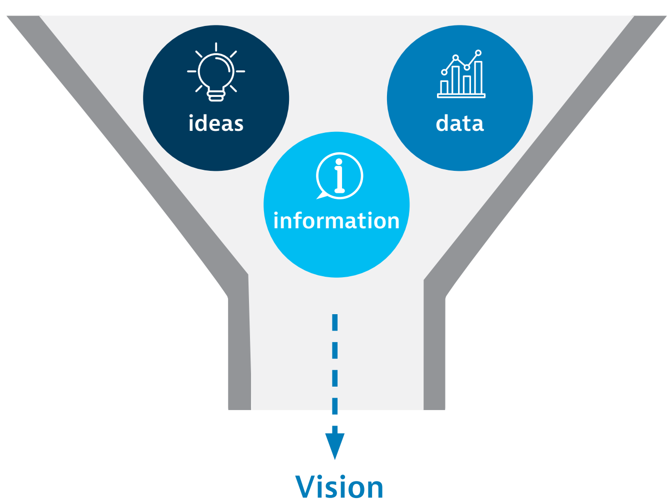
The following potential questions can be used when facilitating a vision discussion:

- If you are successful, what will the newspaper or social media headline say about our community's workforce in 10 years?
- What words or phrases will describe our community's workforce in 10 years, after we have implemented the plan?
- What do we want outside experts (state leaders, site selection consultants, business leaders, economic development officials) to know about our community's future workforce?

After facilitating a discussion on the vision, the next step is to develop a formal vision statement. This can be done by the entire committee or by appointing a subcommittee to develop a draft. Often, workforce plans have a short vision statement that describes the community's aspirations and additional text that details more specific information.

Workforce Plan Template

Be sure to record your community's vision statement on the *Workforce Plan Template* (See Appendix).



Setting Community Workforce Priorities

After the steering committee has developed a vision for your community, the next step is to identify the priorities that will help make that a reality. A priority is an area in which the community will focus its resources. A priority is more specific than the vision but broader than a specific action item. Communities should aim for three to four priorities. It is critical that plans stay focused on a small number of priorities to aid in effective and timely implementation.

The priorities should be unique and developed based on the vision and the information identified during the needs assessment process. Committee members should evaluate potential priorities based on their feasibility and impact. The steering committee should develop these priorities collaboratively.

One way to develop priorities is the three-step approach. First, have each steering committee member review the vision statement and notes from past meetings to develop a list of priorities. Second, have a small group of steering committee members work together sharing their lists, identifying overlaps, and developing a consolidated list of three priorities. Third, the whole steering committee should review the lists from each group, identify any similarities, and develop a shared priority list. It may be necessary to vote to identify top priorities.

Action Item Planning worksheet

Be sure to record your community's priorities on the *Action Item Planning* worksheet (See Appendix).

Sample Priorities

- Upskilling adult workers in the community
- Creating more hands-on learning opportunities for students
- Marketing existing workforce programs and resources in the community
- Aligning educational offerings with local and regional in-demand occupations

STEP 5 Implementation Planning

The final step of the process is turning priorities into action items. This step will involve developing short- and long-term action items for each priority. Each priority should have one or more point persons assigned to it. If no one is willing to serve in implementing the priority, that may indicate there is limited support for it. Your community may consider holding a launch event to share the strategy with additional stakeholders and solicit volunteers to support implementation.

What will be done?

The first discussion point in Step 5 should focus on what partners can do to make progress on priorities. The steering committee should develop action items based on the data, information, and conversations that occurred throughout the process. It is likely that many ideas have been discussed formally and informally throughout the process. The steering committee should consider both short- and long-term action items. Typically, each priority would have two or three short-term action items and one or two long-term action items. You should consider the impact that each action item would have on achieving the priority, the feasibility, and the potential return on investment.

Short-Term Action Items: These can be easily completed within six months and usually involve a limited amount of funds or time. These items are typically focused on program alignment, information sharing, promotion of existing resources, and building new connections.

Long-Term Action Items: Longer term action items typically take one to two years to implement. They also usually involve a significant investment of resources (e.g., cash, grants, in-kind support) and time, and/or large programmatic changes (e.g., new degrees, changing graduation requirements, instituting new standards).

Action Item Planning worksheet

The process to develop the action items can be facilitated similarly to the priority development process. This approach will give steering committee members time to develop their own ideas, validate and refine these, develop a small group list of action items, and share them with the entire committee. You can provide a copy of the *Action Item Planning* worksheet (See Appendix) to use during the process. There will likely be more ideas for the whole group to consider than can be implemented. The steering committee should evaluate each action item based on impact, feasibility, and return on investment. The ideas that meet those three criteria should be prioritized using a group discussion or dot voting.

Resources for Developing Action Items

While the process has likely resulted in many action items, steering committee members may want to review additional resources for ideas and support. Here are a few:

- Creating and Replicating High-Quality Experiential Learning Opportunities: gaworkforce.org/explearning
- Georgia Alignment Toolkit: gaworkforce.org/alignment

Who will do the work?

Action Item Planning worksheet

After the group compiles a list of action items, the next step is to identify the persons responsible for each action item. This does not mean that the responsible person is the only one who will be working on the item, but it does identify who will be on point for each item. The responsible parties will lead implementation, bring together relevant partners, and help see it through. They may also choose to create working groups for more involved tasks or ones that involve numerous partners. Projects that do not have clear accountability for each action item tend to struggle. The responsible parties should be listed on the *Action Item Planning* worksheet (See Appendix).

Establish Performance Indicators

The key to moving from planning to implementation is keeping a rhythm of accountability. This can be done through establishing performance indicators. Measures to gauge success should reflect this purpose through data on employers, education providers, and job seekers against the goals of the plan. Once goals are set and measures identified, collect baseline data. Moving forward, collect and report the data on a regular basis.

The steering committee should seek to develop indicators to track overall impact (i.e., when will we know if our plan has made a difference) and should identify indicators for each priority (i.e., how can we measure our progress). The framework below offers some examples of indicators that could be used for these efforts.

Performance Indicators Framework

1. How much did we do? This performance indicator seeks to quantify how much action was done. Examples include:	· # of page views on the workforce resources website · # of teachers participating in an externship with an in-demand local industry
2. How well did we do it? This level focuses on the quality of the effort completed. Examples include:	· % of students reviewing their completed YouScience profile with a counselor or mentor · Teacher externship program feedback (e.g., satisfaction, applicability)
3. Is anyone better off? The third level seeks to measure what quality of change or impact was produced. This is by far the hardest to measure and usually has the longest time horizon. Examples include:	· Level of skill gain by adult education program participants · % of students working in occupations related to their secondary or postsecondary training one year after graduation

Adapted from *Trying Hard Is Not Good Enough* by Mark Friedman (2009)

STEP 6 Ongoing Progress Review

One of the worst things that can happen to a workforce plan is to go through all the effort only to have the project get put on a shelf and the plan never implemented. To prevent this, it is important to continue to meet and regularly review your progress. Below you will find guidance on how to manage ongoing implementation, as well as how to find what works for your community and go with it.

Keep the following things in mind as you implement your plan:

1. **Keep it simple**. Focus on no more than three priorities at a time. This plan will not be completed in the first year. Some items may take longer, while others may be quick wins.
2. **Respect participants' time** and remember that everyone is a volunteer. Be grateful for everyone's contributions, both big and small.
3. **Keep up the momentum** by accomplishing something at each meeting or sharing the items that each group has accomplished between meetings. Keep notes, document action items, identify who is responsible for each item, and establish a timeline. Share the notes after each meeting with all participants.
4. **Schedule meetings at regular intervals**. Pick a date and time and stick with it. This will make it easier to remember and will also provide regular check-ins for accountability.
5. **Be flexible**. Adjust the plan and priorities as needed. The economy may change, there may be large changes with the educational institutions in your area, or a variety of other circumstances can occur, but those aren't reasons to give up on or completely scrap the plan. Rather, reassess and adjust the plan to make it work under the new circumstances.
6. **Assess progress and track impact** on the KPIs every six months or so, and adjust deadlines accordingly. The *Implementation Tracking* worksheet (See Appendix) can be modified to fit the number of priorities and action items in your community's plan.

Implementation Tracking worksheet

Georgia Workforce Planning Guide

Worksheets and Forms

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Capacity, Readiness, and Goals Assessment

This assessment framework is designed to help the initial planning team properly review the community's capacity, readiness, and goals for the workforce planning process. The framework can be used as a discussion guide to consider the community's current status and make a decision about moving forward. If the community opts to not move forward at this time, the information learned from the discussions can be used to complete targeted action items to properly prepare for a future workforce planning process.

The initial planning team should review this document together, decide on a 1–5 rating for each statement, and take applicable notes. At the end of the discussion, the initial planning team should develop an overall assessment and determine its ability to move forward.

Capacity	Select 1–5 1 = strongly disagree 5 = strongly agree	Notes
We are not undertaking any other large-scale planning or projects requiring public input that may conflict with workforce planning efforts.	1 2 3 4 5	
We have sufficient committed resources and in-kind assistance to support a workforce planning project.	1 2 3 4 5	
The initial planning team is committed to serving in an ongoing leadership coordination role at least through the release of the workforce plan (approx. 6 months).	1 2 3 4 5	
Our community is ready to undertake a multiyear commitment to strengthening workforce development activities.	1 2 3 4 5	

Readiness	Select 1-5 1 = strong no 5 = strong yes	Notes
The key workforce planning partners (e.g., governmental bodies, education, economic development, community organizations) in our community currently work well together.	1 2 3 4 5	
We have consulted key workforce planning partners (e.g., governmental bodies, education, economic development, community organizations) to ensure their willingness to participate and support a workforce plan.	1 2 3 4 5	
Community leaders are interested in enhancing workforce development efforts here.	1 2 3 4 5	

Capacity, Readiness, and Goals Assessment

Goals	Select 1-5 1 = strong no 5 = strong yes	Notes
Our community currently has clear workforce development challenges.	1 ◯ 2 ◯ 3 ◯ 4 ◯ 5 ◯	
Employers have experienced challenges recently in hiring and retaining a qualified workforce.	1 ◯ 2 ◯ 3 ◯ 4 ◯ 5 ◯	
Our community is willing to work together to solve cross-cutting issues.	1 ◯ 2 ◯ 3 ◯ 4 ◯ 5 ◯	

Overall Initial Planning Committee Assessment

Steering Committee Planning

This resource will help the initial planning team identify and recruit steering committee members for the community workforce development process. The first section covers the composition of the steering committee, and the second section is a worksheet to identify the steering committee members, potential contributions, and who is responsible for outreach.

Steering Committee Composition

The list below details the people that typically serve on the steering committee for a community based workforce planning process. The members of the steering committee will vary by the community, industry makeup, and history, but this is a good list to consider when building a steering committee. Ideally, the steering committee should be between 15 and 20 people.

Steering committee members may include:

- Chamber of Commerce executive
- Economic development/development authority executive
- Representatives from several major industries in the community (e.g., HR director, business owner, plant manager, operations manager)
- School district superintendent
- School board member
- Career, Technical, and Agricultural (CTAE) director, college and career academy CEO, and/or secondary education teacher
- Postsecondary institution leader(s) (University System of Georgia, Technical College System of Georgia, and/or private colleges and universities)
- Community development partners (e.g., Georgia Power or local EMC)
- Representatives of key community organizations (e.g., workforce development board, wraparound services, community support, faith leaders, youth development)
- City/county government leaders
- Community leaders
- Financial institution leader (e.g., bank president, commercial lending VP, etc.)

Steering Committee Planning

Steering Committee Member Identification

This worksheet is designed to be used by the initial planning team to identify potential members of the community workforce development steering committee. The *Potential Contribution(s)* column should be used to highlight how the steering committee member could assist with developing and implementing the workforce strategy. The *Assigned Outreach Person* column should designate the person who will be responsible for reaching out to the prospective steering committee member to garner their participation.

	Name, Organization, and Role	Potential Contribution(s)	Assigned Outreach Person
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
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17			
18			
19			
20			

Sample Six-Month Workforce Development Planning Project Timeline

month 1	· Form initial planning team. · Complete the capacity, readiness, and goals assessment. · Identify steering committee, set meeting dates, and coordinate project logistics.
month 2	· Begin data collection and analysis for the needs assessment. · Host meeting 1 (project kickoff meeting). · Begin needs assessment efforts (survey and/or company presentations).
month 3	· Host meeting 2 (needs assessment). · Conduct additional needs assessment outreach.
month 4	· Host meeting 3 (environmental scan and vision development).
month 5	· Host meeting 4 (priority and action item development). · Convene a writing committee to develop the final plan document.
month 6	· Begin implementation. · Host action item planning subcommittee meetings. · Develop a schedule for future meetings and implementation tracking.

Data Analysis Guided Questions

Current Community Demographics	
What percentage of our community is living in poverty?	
What is the median household income?	
What is the racial and ethnic makeup of our community?	
What is the age structure of our community?	

Projected Community Demographics	
Is our community expected to grow or shrink over the next 30 years?	
What is the projected population in 10, 20 and 30 years?	
Which age and racial/ ethnic groups are expected to change the most?	
How will these changes impact our community and specifically the workforce?	
What is the projected age structure of our community?	

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Data Analysis Guided Questions

Education	
What is the local high school or district graduation rate?	
What percentage of high school graduates are HOPE eligible?	
What percentage of the high school graduating class goes on to postsecondary education (USG, TCSG), goes immediately to work, etc.?	
What is the educational attainment level of the adults (age 25 +) in community?	
What local postsecondary institution programs have the most enrollments and completions?	

Existing Workforce	
How many people are in our labor force?	
What is the unemployment rate in our community?	
What percentage of our workforce lives outside the community, and where do they come from?	
What percentage of our residents work outside the community, and where do they commute to?	
Who are the largest employers in our community?	
What jobs are expected to grow the most over the next 7-10 years?	

Data Analysis Guided Questions

Key Data Points to Focus on

Which of the previous data points are the most surprising to the group?

Which of these points would we like to see positive movement on?

Go back and look at those data points for several previous years to get an idea of the trend. Are they headed in the right direction, or do we need to do something to turn them around?

Realistically, which of these can we impact with our workforce strategy?

Identify two to five key data points to be considered for key performance indicators. Why did we pick those? How can our workforce strategy change these data points?

Environmental Scan

Option 1:
Situation, Assets, Needs, And Opportunities

Situation	Assets
Consider the following questions: · What is the current situation with our community's workforce? · What is working? What isn't working?	Consider the following questions: · What workforce assets do we have as a community? · What resources are already in place, and how can they be expanded upon?
Needs	**Opportunities**
Consider the following questions: · What is the current situation with our community's workforce? · What is working? What isn't working?	Consider the following questions: · What are the best opportunities for our community's workforce? · How can we best meet the needs of our stakeholders? · What changes and trends in the market align with our strengths?

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Environmental Scan

Option 2:
SWOT

<table>
<tr><th>Strengths</th><th>Weaknesses</th></tr>
<tr><td>Consider the following questions:
· What are the greatest strengths of our community's workforce?
· What do we excel at?
· What makes us unique?
· How do we use our strengths to get results?</td><td>Consider the following questions:
· What weaknesses exist in our community's workforce?
· What do our competitor / peer cities do better than us in regard to the local workforce?
· What workforce-related problems have local employers expressed?</td></tr>
<tr><td></td><td></td></tr>
<tr><th>Opportunities</th><th>Threats</th></tr>
<tr><td>Consider the following questions:
· What are the best opportunities for our community's workforce?
· How can we best meet the needs of our stakeholders?
· What resources are already in place, and how can they be expanded upon?
· What changes and trends in the market align with our strengths?</td><td>Consider the following questions:
· What are the greatest threats to our community's workforce?
· What barriers may get in the way of achieving future success?
· What roadblocks may limit our ability to fulfill the opportunities we have identified and achieve our aspirations?</td></tr>
<tr><td></td><td></td></tr>
</table>

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Workforce Plan Template

The workforce plan summary document can be used to capture the final decisions made throughout the planning process. The document can be used internally by the steering committee to support implementation, and externally with additional stakeholders, funders, state officials, and others to share the community's vision and workforce development goals.

Your community may wish to produce a more detailed planning document in addition to or in place of the basic template, but this summary can be used to get your community thinking about what to include in a more detailed document. If you choose to compile a more detailed planning document, you might think about hiring a technical writer to ensure your message is clear and easy to understand as well as a graphic designer to make the plan visually appealing.

[County/Region Name] Workforce Plan

In this section, include an introductory paragraph or two detailing why the community developed a workforce development strategy, how the plan was developed, and who was involved. Feel free to add additional contextual information.

Industry and Community Needs Assessment Highlights

Write a summary paragraph and/or bullet points that highlight the key takeaways from the industry and community needs assessment completed as part of step 3 using the *Environmental Scan* worksheet.

Vision for Workforce Development in [County/Region Name]

Include the community's vision for workforce development developed in step 4. You may also choose to include additional text that further supports the vision statement.

Priorities, Action Items, and Responsible Parties for Workforce Development in [County/Region Name]

Insert a copy of the *Action Item Planning* worksheet, completed in step 4, or copy the table to your workforce plan document.

Plan Performance Indicators

Insert a list or table of the final performance indicators developed during step 5 by the steering committee using the *Implementation Tracking* worksheet.

Steering Committee Members

Include names from the *Steering Committee Planning* worksheet, identified in step 1, who helped develop the plan.

Action Item Planning

This Action Item Planning Worksheet can be used to record and share the action items developed during Step 5 of the planning process. The sample chart below shows how to complete a section of the worksheet. The following pages contain blank version of the Action Item Planning worksheet that the steering committee can complete.

Sample

Priority #1

Help young adults in our community connect to in-demand career opportunities in our community.

Action Item	Time Frame		Responsible Person or Persons
	Short-Term	Long-Term	
Implement the YouScience profile with all 10th grade students.	●	○	Dr. Lillyblad (high school counselor) and Dr. Davis (school district superintendent)
Create 20 new work-based learning placements for in-demand occupations.	○	●	Jamal Jessie (work-based learning coordinator) and Brooke Perez (chamber of commerce executive)
Plan a parent university event to educate parents on local opportunities and pathways to achieve them.	○	●	Kira Crowe (Acme Widgets) and Dr. Lillyblad (high school counselor)
Invite industry leaders to serve on relevant program advisory committees.	●	○	David Tanner (economic development director) and Rope Roberts (Community Healthcare Inc.)
Create a teacher externship program to expose CTAE and academic teachers to local industries.	○	●	Serra Hall (economic development project manager), Dr. Davis (school district superintendent, and Rebecca McIver (city manager)

Action Item Planning

Priority #1

Action Item	Time Frame		Responsible Person or Persons
	Short-Term	Long-Term	
	◯	◯	
	◯	◯	
	◯	◯	
	◯	◯	
	◯	◯	

Priority #2

Action Item	Time Frame		Responsible Person or Persons
	Short-Term	Long-Term	
	◯	◯	
	◯	◯	
	◯	◯	
	◯	◯	
	◯	◯	

Action Item Planning

Priority #3

Action Item	Time Frame		Responsible Person or Persons
	Short-Term	Long-Term	
	○	○	
	○	○	
	○	○	
	○	○	
	○	○	

Priority #4

Action Item	Time Frame		Responsible Person or Persons
	Short-Term	Long-Term	
	○	○	
	○	○	
	○	○	
	○	○	
	○	○	

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Implementation Tracking

Use this form to track your vision, priorities, and action items, including what has been accomplished and what steps need to be taken. This worksheet can also be used when evaluating your efforts in your plan (quarterly, annually, etc.). Don't forget, the whole plan does not have to be accomplished in one year. Some items may be more long term or rely on other items being completed.

Vision Statement

Priority #1

Measures of Success (Key Performance Indicators)

	Action Items	Complete	In Progress	Not Started
1.		◯	◯	◯
2.		◯	◯	◯
3.		◯	◯	◯

Priority #2

Measures of Success (Key Performance Indicators)

	Action Items	Complete	In Progress	Not Started
1.		◯	◯	◯
2.		◯	◯	◯
3.		◯	◯	◯

Implementation Tracking

Priority #3

Measures of Success (Key Performance Indicators)

	Action Items	Complete	In Progress	Not Started
1.		◯	◯	◯
2.		◯	◯	◯
3.		◯	◯	◯

Priority #4

Measures of Success (Key Performance Indicators)

	Action Items	Complete	In Progress	Not Started
1.		◯	◯	◯
2.		◯	◯	◯
3.		◯	◯	◯

Implementation Tracking

How did we celebrate our successes so far?

Emerging Trends of Note

New Challenges

New Opportunities

New Assets (e.g., businesses)

New Funding Opportunities (e.g., political changes to budgeting, grants)

Changes in Personnel Involved

Changes in Priorities or Objectives

Today’s date: ____________________ Next progress review date: ____________________

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Notes

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