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ILLINOIS
DEPARTMENT OF COMMERCE & ECONOMIC OPPORTUNITY

IDES
ILLINOIS DEPARTMENT OF EMPLOYMENT SECURITY

IDHS
Illinois Department of Human Services

Illinois Integrated Business Services Environmental Scan

Submitted to:

Illinois Community College Board

Illinois Department of Commerce and Economic Opportunity

Illinois Department of Employment Security

Illinois Department of Human Services

Submitted by:

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May 27, 2016

Table of Contents

I. Introduction

a. Project Origin and Objectives

The Workforce Innovation and Opportunity Act (WIOA) provides a new landscape for states to align and integrate business services to drive better outcomes for both job seekers and businesses. The four WIOA core partners in the State of Illinois [Department of Commerce and Economic Opportunity's Office of Employment and Training (DCEO/OET), the Illinois Department of Employment Security (IDES), the Department of Human Services' Vocational Rehabilitation (DHS/VR) and the Illinois Community College Board (ICCB)] sought to capitalize on this opportunity and requested consultant support from the United States Department of Labor's Chicago Regional Office to integrate their business services design and operations. Recognizing that integration is a complex process, the agency partners, Maher & Maher and the Regional Office agreed that a strategic first step should be a scan that outlines how business services are currently structured, designed, and delivered across the four core partners in Illinois. This information will support the agencies' understanding of each other's work and allow for identification of opportunity areas for streamlining and alignment.

In addition to the scan of current business service delivery, Maher & Maher was also asked to identify key components of effective integrated business services as well as promising practices or models related to those elements to support possible replication, in part or whole, by the Illinois Inter-agency team. Those resources will help support the agencies as they move forward with developing an action plan for business services integration. Finally, the Maher & Maher team was asked to capitalize upon the knowledge gained through its extensive work supporting various workforce initiatives in the State of Illinois and around the country to provide recommendations for next steps to be taken by the four partner agencies to "move the needle" toward integration.

This report is the product of the Illinois' core agencies' technical assistance request and the ensuing collaboration between Maher & Maher and the Illinois WIOA core partners to collect, analyze and compile information around current business engagement and service delivery for each agency. The process included surveying (for those agencies partnering with organizations at the local level to deliver services), multiple interviews and extensive follow-up discussion to ensure as much accuracy as possible.

b. About this Report

To achieve the objectives outlined above as concisely as possible, Maher & Maher has structured this report to provide information at both the macro level (thematically across agencies) and the micro level (individual narratives that provide agency-specific detail). The key sections of this report include:

- A high-level summary comparing/contrasting business services design and operations across the agencies for key areas including governance, organizational structure, approach, staffing roles and responsibilities, staff professional development, data tracking and performance
- A matrix that provides a "snapshot" of each agency's design and delivery of business services by answering Yes, No, Not Applicable, Planning, or Underway for specific data elements supporting the key areas listed above

- An integrated business services framework which includes description of the critical components and promising practices for possible replication or adoption by the Illinois State Inter-Agency Team
- Recommendations for next steps to further integrate business services across agencies
- Detailed narratives (found as appendices) that provide agency-specific information to support the "snapshot" in the matrix.

II.   IDES, DCEO (OET), ICCB and DHS (Vocational Rehabilitation) Business Services Program Analysis & Matrix

a. Analysis

This section of the report provides a high-level summary of the data collected across the four agencies for the identified key elements with the goal of highlighting both the common areas and those where the agencies diverge in structure or approach. This narrative corresponds with the elements in the matrix that follows. Agency-specific detail is located in the Appendices.

Governance (Mission, goals, authority to issue policy and mandated activities)

When considering the governing role across the four organizations reviewed in this report, it is easy to detect commonalities across OET, IDES, and VR due to their designation as state agencies or divisions within state agencies. Those agencies receive federal and state funding to administer programs that have clear requirements regarding overall service design and delivery. They also have the authority to issue policy that governs how state and local staff deliver services for those programs. Conversely, ICCB was established by the Illinois General Assembly to coordinate and support, rather than govern, the Illinois Community College System. Locally elected boards of trustees set policies and local goals (along with some statewide goals) for local community colleges. ICCB uses the advice and counsel of all constituent groups of the community college system in establishing policies necessary to implement state statutes and follows a set of administrative rules. Business services, however, is not an area where ICCB issues policy or guidance.

OET, IDES, and VR each have mission statements that specifically address meeting the needs of businesses. ICCB's mission statement speaks more generally to meeting the education and training needs of Illinois residents and communities. OET and IDES have articulated goals to strengthen connections with businesses and ICCB has identified a goal theme around improving partnerships with workforce and economic development agencies to provide more seamless and valuable services to businesses, which will be finalized through their upcoming strategic planning work.

Organizational Structure (state-level staff, local-level staff)

IDES and VR employ state agency staff that engage in business services in local areas across the state. IDES staff are nearly all co-located within Illinois workNet Centers and some VR staff are co-located, as well. ICCB does not provide services directly to businesses - those services are provided by local staff in community colleges. However, the Senior Director for Workforce Development at ICCB, however, does have a number of roles and responsibilities which support local community colleges in their effort to serve business. This structure is similar to OET which has a small number of state staff who manage initiatives to support the local workforce system's engagement with and service delivery to business. Nearly all LWIAs have business services staff who operate within one of the twenty-six Local Workforce Innovation Areas (LWIAs). Finally, in addition to state agency staff delivering business services locally, VR also has a National Employment Team (NET) contact who engages directly with businesses referred from a national point of contact or from partners across state lines.

Approach (Policy/Procedures, Coordination across partners, industry sectors, sectors-based approach)

OET has not issued policy or procedures to the local LWIAs directing the design or delivery of business services. ICCB also has not issued such policy since it is not within their authority to do so. IDES does have specific procedures around some aspects of business services such as the process for posting job opportunities, and VR also issues procedures guiding some aspects of services to business but notes that each region has the discretion to design services to meet their specific needs.

The four organizations are committed to coordination across partners, as evidenced by their support of this project and are in the early stages of determining how that collaboration will be implemented through local service delivery. Without definitive guidance from their State governing agency, some regional partners are already coordinating through locally-established business teams and informal information sharing.

IDES and VR staff are not organized by sector nor are they implementing a sectors-based approach. Both agencies, however, noted that their engagement in the regional planning effort under WIOA has provided an excellent foundation to move forward with a more strategic, sector-oriented approach. OET has articulated a sectors-based framework and some LWIAs are targeting key sectors and managing sector partnerships, although this is not consistent across the state. Similarly, several of ICCB's Corporate Training Centers noted participation on local/regional business services teams and regional planning efforts to identify key sectors but, like the LWIAs, this is not happening in every region.

Staffing Roles/Responsibilities

OET Program and Planning staff frequently meet with businesses and associations for insight into how to improve local service delivery. The majority of OET staff, however, who engage directly with business are working with the Rapid Response program to support businesses undergoing layoffs by coordinating services to the affected workers. Their work entails building relationships and working with businesses to mitigate the impact of the layoffs and also determine if workforce training services could forestall future layoffs.

WIOA Title I business services are mainly provided through LWIA staff whose responsibilities vary, but typically include outreach to businesses, managing on-the-job training contracts and incumbent worker grants to companies, marketing (often via website and social media), and providing information to companies regarding the offerings available through the workforce system.

IDES' Business Services Managers and Coordinators work with all companies to provide job matching services while IDES' Veterans' Employment Representatives work specifically with businesses on behalf of veterans as well as Disabled Veterans' Employment Representatives who work on behalf of veterans with disabilities. VR Employment Resource Specialists (ERS) are specifically charged with engaging with businesses for the purpose of understanding their current and future needs and matching those with clients. They also work to foster an ongoing relationship with business customers to ensure consistent support and services. ERS can provide a variety of services to business to support successful employment of people with disabilities. Services span a broad spectrum, from consulting and technical assistance to businesses to enhance their disability

awareness, to financial support for training and job accommodations. Staff employed through community colleges' Corporate Training Centers also provide a variety of consulting and coaching but may also develop customized training for specific businesses.

It is also important to note that all of the organizations' business services representatives or their local partners, directly engage with business. As mentioned above, the degree of coordination for that engagement varies across the state.

Professional Development

IDES' Veterans' Employment Representatives attend training at the National Veterans Training Institute (NVTI) in Denver, Colorado within 18 months of hire and then periodically. This federally mandated training is specifically designed for the LVER (Local Veteran Employment Representative) and the DVOP (Disabled Veterans' Outreach Program) specialist. They both are required to attend the Facilitating Veterans Employment (FVE) program. The LVER who focuses his expertise with the business sector undertakes the Employer Outreach training and the DVOP concentrates his training in Intensive Services (IS). ICCB noted that staff have access to a professional training organization which may offer training on business engagement. OET and VR both have initiatives underway to provide training for staff on business services; in fact, the initial training for front-line LWIA staff on this topic will be held in June 2016.

Business Engagement/Services Data Tracking

IDES uses the Illinois Job Link (IJL) to post job orders from businesses and track outreach. OET does not have a Client Resource Management (CRM) tool, but several LWIAs reported using a variety of different products purchased off the shelf from vendors. VR does not have a CRM but is in the process of developing one to track their Counselors' business engagement. Community College Corporate Training departments have their own process and tools for data tracking which may be a simple spreadsheet or a more sophisticated CRM.

Clearly, each organization is using or developing their own method for tracking business engagement. Of these approaches, IJL is the only system that allows limited access to most partners if a data sharing agreement is in place.

Management/Staff Performance Standards

OET, ICCB, and IDES did not report any specific management or staff performance standards regarding business engagement. VR's ERS staff do have specific measures that pertain to working with business. Those measures are not developed statewide but on a regional level. Some of the metrics include:

- Meeting with a set amount of businesses per month in their assigned area to ascertain types of employment available
- Meeting with VR Counselors in their offices monthly to discuss qualifications for business hiring
- Working with local offices on Work Support Group activities
- Working with local offices on Job Fairs and Community Events
- Meeting with office supervisors and regional supervisors quarterly to discuss
- Employment issues relevant to the region

Program Performance Measures

As the grant recipient for WIOA Title I, OET will be held accountable for achieving any performance measures defined in the Final Rule, including those regarding services to businesses. However, because OET is not the primary provider of business services, they manage performance by providing monitoring, oversight and technical assistance to support LWIA achievement of these performance standards. Many LWIAs already have their own, locally-developed performance measures around engaging and serving businesses. Examples of measures include the number of job fairs held, number of job market presentations done within the workforce area, number of resumes submitted to businesses, and number of new companies brought into the workforce center for the year.

IDES and ICCB did not report any program performance measures for serving business, although local community colleges may have established such measures. Also, although VR is the only agency currently with performance standards for staff around business engagement and services, they did not report any program performance measures specific to serving business.

Benefits/Challenges to Aligning Business Services

Each of the organizations included in this report expressed real benefits to integrating and aligning business services through information sharing and referrals across programs. VR and the LWIAs also noted that a clear benefit would be streamlined engagement with business and the use of a consistent message to businesses regarding the benefits of working with the workforce system.

Challenges to integrating and aligning business services include the different geographical and administrative structured for the organizations, i.e. the various geographic boundaries and the fact that not all partners have local decision-making authority. ICCB noted that Corporate Training Departments must generate enough revenue to cover their costs each year which means that their financial goals that are different from federally-funded core partners. An additional challenge is that each partner must be able to present a balanced view of all of the programs and services offered across the system.

Current/future Initiatives

All of the organizations are engaged in some type of initiative to enhance business services, specifically:

- IDES' Business Services Coordinator role is going through a LEAN process which may result in changes to the position. There is also discussion about alignment between the Business Services Division and the Employment Services Division of IDES.
- OET is in the process of developing a strategic plan which includes goals and objectives designed to streamline OET and LWIA business services as well as improve external partnering and communication.
- VR is receiving technical assistance through a national effort to improve business engagement across the VR program which should increase staff capacity in this area. This project started in November and is scheduled to last through next year.
- VR's development of a CRM tool will provide a better way to track engagement with different industry sectors.

- The Illinois Workforce Partnership (IWP) which is an association of the Illinois LWIAs has planned a series of webinars for State and local areas staff around key topics, including business engagement, which will be held in June 2016.
- ICCB's current strategic planning work includes elements of service coordination and will enhance the support and dialogue around this issue. (Note: The corporate training report that is underway within ICCB will contain useful information about the business services being provided across the state.)

b. Matrix

The following matrix provides a "snapshot" of how each partner designs and delivers business services. The objective of this format is to provide information individually and across partners to allow for quick identification of partner-specific responses for each element as well as commonalities among and differences between the organizations.

Please note that two of the partners, OET and ICCB, have two columns in the matrix – one for state level information and a second for local level information. This reflects the fact that these partners have a state level agency that oversees (or coordinates) a service delivery system, but implementation happens at the local level through separate organizations- in this case LWIAs and Community Colleges. Additionally, please note that the responses for ICCB reflect the corporate training aspect of the system and not other outreach or contact with businesses that ICCB workforce staff may engage in for special projects or initiatives.

The information shared through this matrix is intended to be general. Specific detail supporting the Yes (Y), No (N), Not Applicable (NA), Planning Underway (P), or Unknown (U) responses for each agency is located in the Appendices section of this report.

Y = Yes, exists or is performed by staff **N** = Does not currently exist/happen and planning not underway **P** = Planning underway **NA** = Not applicable **U** = Unknown	IDES	DHS -VR	DCEO-OET		ICCB	
			State	LWIA	State	CC
GOVERNANCE						
State agency mission supports business services program	Y	Y	Y	NA	Y	NA
State agency has goals related to business services	Y	Y	Y	NA	Y	NA
Has authority to issue policy impacting engagement with and service delivery to businesses	Y	Y	Y	Y	N	Y
Has statutory/regulatory mandate related to providing business services	Y	Y	Y	Y	N	N
ORGANIZATIONAL STRUCTURE						

	IDES	DHS-VR	DCEO-OET		ICCB	
Y = Yes, exists or is performed by staff N = Does not currently exist/happen and planning not underway P = Planning underway NA = Not applicable U = Unknown			State	LWIA	State	CC
State-employed staff provide business engagement and services from a central location	N	Y	Y	NA	NA	NA
State-employed staff provide business engagement and services through local office	Y	Y	N	NA	NA	NA
Locally-employed staff provide business engagement and services through local office	N	N	Y	Y	NA	Y
Staff organized/assigned by sector	N	N	Y	Y	NA	N
APPROACH						
Has issued policy and/or procedures outlining the overall approach, staff roles/responsibilities and expectations regarding services to businesses	Y	N	Y	Y	NA	Y
Has defined industry sectors	P	N	Y	Y	NA	Y
Uses a sectors-based approach	P	N	Y	Y	NA	N
STAFFING ROLES/RESPONSIBILITIES						
Contact businesses to identify their needs and inform them of their agency/services	Y	Y	Y	Y	NA	Y
Contact businesses to engage them in hiring of program participants	Y	Y	Y	Y	NA	N
Collect and seek to fill job postings	Y	Y	Y	Y	NA	N
Contact businesses to engage in special workforce development initiatives	Y	Y	Y	Y	NA	Y
Organize and host job fairs	Y	Y	Y	Y	NA	Y
Participate in job fairs organized/hosted by others	U	Y	Y	Y	NA	N
Respond to business requests for qualified candidates	Y	Y	Y	Y	NA	N
Lead or participate in a business services team or group that works to coordinate business engagement across partners	Y	N	Y	Y	NA	Y

	IDES	DHS -VR	DCEO-OET		ICCB	
Y = Yes, exists or is performed by staff N = Does not currently exist/happen and planning not underway P = Planning underway NA = Not applicable U = Unknown			State	LWIA	State	CC
Lead or participate in an industry group or sector partnership	Y	N	Y	Y	NA	Y
STAFF PROFESSIONAL DEVELOPMENT						
Staff receive formal business services training	Y**	P	Y	P	NA	U
Staff receive informal, on-the-job business services training	Y	Y	Y	Y	NA	Y
Staff receive training on relevant industry sectors	N	N	N	N	Y	U
DATA TRACKING						
Staff use a CRM/MIS tool to track engagement with and service delivery to businesses	Y	P	Y	Y	NA	Y
Access to the CRM/MIS tool is or can be given to partners	Y	NA	Y	N	NA	N
Data from the CRM/MIS tool is or can be shared with partners	Y	NA	Y	Y	NA	N
PERFORMANCE METRICS						
Managers of business service staff have individual performance metrics	N	Y	N	Y	NA	U
Staff providing services to businesses have individual performance metrics	N	Y	N	Y	NA	U
The business services program has performance metrics	N	Y	N	Y	NA	U

*Please note that Y appears under LWIA and CC columns if the statement is true in one or more local areas across the state.

** Only LVERs and DVOPs get formal training.

c. Conclusion

It is clear that although there are real differences in structure and operations across the four organizations involved in this project, they share a common primary goal of understanding and meeting business needs. While the administrative and program differences are challenging, their

stated, shared commitment of making the needs of business customers a priority should provide the momentum needed to move forward with business services integration.

III. A MODEL STATEWIDE FRAMEWORK FOR INTEGRATED BUSINESS SERVICES & PROMISING PRACTICES

The ideal environment for the delivery of unified business services is one where sector-based talent pipeline development is the strategic framework for service delivery, and workforce areas and primary partner organizations are organized on the basis of functional economic regions, at least for planning purposes. In fact, in locations where this is the case, the key elements for unified business services are likely already in place, including:

- Strong, regionally-based industry partnerships between public agencies and businesses;
- Collaborative identification of key regional industry sectors;
- Sector-based career pathways; and
- Ongoing identification of talent supply chain needs for the region.

In this report, we aim to provide a usable, adaptable framework to help Illinois move its workforce system into much closer relationships with public partners who also are seeking to deliver human resource-related services to business. We will also present some promising practices and online resources to help Illinois move toward sector-based integrated business services.

The chart below provides an overview of the five foundational elements, presented at both the strategic and operational level, of an ideal unified business services system. Discussion of each element, along with specific promising practices, immediately follows the chart.

STRATEGIC AND OPERATIONAL ASPECTS OF AN IDEAL UNIFIED BUSINESS SERVICES SYSTEM[1]

FRAMEWORK ELEMENT	STRATEGIC or STATE LEVEL	OPERATIONAL or LOCAL LEVEL
Organizational Structure	Establish a collaboration based on sustained, trusting relationships between key partners including workforce development, education, and economic development State-level, team-based development of administrative and service delivery framework, involving ALL key statewide partners Team issues joint policy and offers technical assistance and training to local Business Service Teams (BSTs)	Each region has a Business Services Team (BST) comprised of knowledgeable business services partners with the ability to connect businesses to a full range of partner services – Workforce area and Wagner/Peyser funded, Community College(s) and Economic Development Agency(ies), at a minimum The BST operates as a cohesive unit, regardless of program, funding stream, or organization from which BST staff members may originate
Management of Business Intelligence	Establish an automated customer relationship management (CRM) system that provides for open collection, analysis and management of business intelligence	Ensure that all partners have read/write access to information available through the CRM platform

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[1] It should be noted here that the "operational or local level "material is not intended to be at all comprehensive, but is rather presented to provide context and rationale for state-level activities and actions needed to establish and support local level systems.

FRAMEWORK ELEMENT	STRATEGIC or STATE LEVEL	OPERATIONAL or LOCAL LEVEL
		Maintain awareness of business needs, contacts and services, as well as outcomes
Solutions-Based Service Offerings and Delivery	Partners' strategic plans and related policies and funding investments reflect shared goals and processes insofar as serving businesses Coordinate, connect, and align all state grants, programs, and assets	Coordinate, connect, and align all local grants, programs, and assets Institutionalize the notion of shared client ownership and accountability and management planning Strategic business outreach and contact is designed collectively, and services are not siloed or menu-driven, but focus on delivering solutions to expressed business needs
Emphasis on Work-Based Learning and other Business-focused services	Update statewide policy adjustments to the following work based training programs: • Transitional Jobs • Work experience/internship • On-the-job training (OJT) • Customized Training • Incumbent Worker Training (IWT) • Registered Apprenticeship	To the extent appropriate and possible, make these services central features of solutions. This will require cross-agency training to ensure that all partners are aware of the solutions inherent in these approaches.

FRAMEWORK ELEMENT	STRATEGIC or STATE LEVEL	OPERATIONAL or LOCAL LEVEL
	Offer promising practices on other business-focused services, including "essential skills" training	
Accountability and Performance Measurement	Establish model for measurement: • Systems Change - Partnership development and enhancement, performance improvement, resource sharing and utilization, sustainability • Value to Businesses - Reduced turnover, enhanced retention, enhanced business productivity • Worker Outcomes - Training completion, employment and employment retention, earnings, skill acquisition and credential attainment, career advancement	Establish metrics for each measure Establish quality goals, track achievement Establish quantified goals, track performance Establish quantified goals, track performance

a. Organizational Structure

A unified business service strategy must articulate the roles, responsibilities and expectations for collaboration in such a way that all parties can support a business engagement process that eliminates multiple contacts and presents a "unified" system to businesses. That said, the strategy must capitalize on the relative strengths and capabilities of the various institutions and agencies and even, at the local level, allow for relative strengths of individual staff members. This, however, need not detract in any way from the ideal of presenting one "face" to businesses. Additional information on how local Business Services Teams - BSTs - may capitalize on their members' relative strengths is presented in "c. Solutions-Based Service Offerings and Delivery."

At the state level, it is important that a relatively high-level interagency management team be established to set policy, exhibit a united front and model cross-agency behavior, and provide training, technical assistance and other support to local unified Business Services Teams (BSTs). It is critical that this state-level team speak with one voice, and that the message be "pushed out and down" through each agency's established communication mechanism. The team should systematically solicit opinions and perspectives from local BSTs as to their support and policy needs, and then actively deliver on those needs.

No matter the amount of influence or level of expertise offered by the state team, local workforce agencies may not always be successful in rallying partners to come to the table and operate in a collaborative or unified fashion. Some successful approaches include:

- **The State of Colorado** offered the advice of "Start with the willing," but require each local area to involve its best Business Service Representative, as this will indicate the level of importance the workforce system places on collaborating with partners around business services. This approach was taken as the state was embarking on a sector strategy framework.

- **Seattle/King County** has taken a more long-term approach that is designed to build understanding and trust among people who work in the various organizations, and to thereby create a foundation for connecting asset "dots" and building a true system. For about a year, there have been quarterly "system convenings" designed to bring together all workforce-related business service providers in the region. These *informal* sessions have focused on information sharing and networking; in other words, they have constituted a non-threatening way of beginning to identify the various business service assets in the region, and the people who control those assets.

- **North Carolina** mandated that 1,000 business outreach contacts be made in 100 days and, more importantly, that three representatives had to make the visits together. Representatives were pre-trained NOT to recite menu lists of services, but rather to question businesses about their human resource challenges. This led to establishment of "Collective Business Engagement Teams". While such mandates are often not effective, in this case the requirement that a One-Stop Center representative be joined by a combination of vocational rehabilitation, community college and economic development agencies set the tone for teaming on both outreach and on solution creation. "Listen to business" was the order of the day.

Additional organizational and direct state-to-local support issues include the following:

- **Technical Assistance and Training/Capacity Building of Local Staff**: The skills and competencies required by staff under a unified business services system will likely be more advanced than staff members' current skill sets. Consultative, relationship-based business solution service delivery as discussed in section C is certainly more complex and nuanced than more traditional forms of "transactional" or labor exchange-focused business service delivery, and embodies a significant culture shift on the part of each agency and every individual making contact with businesses. In addition, there will likely be training needs related to the shared customer "ownership" model and effective territory management strategies and practices. Therefore, partners at the state level should dedicate significant resources to cross-agency staff training and skill development in order to meet generalized needs across multiple local areas and agencies.

> ### Promising Practices:
>
> Skills Wisconsin: An Initiative to Improve Industry-Driven Worker Training: This technical assistance report created by Maher & Maher for the Workforce Development Board of South Central Wisconsin provides analysis of pertinent information and intelligence from companies and individuals who provide staff capacity building and training to support the function of serving businesses.
>
> Business U: Business U is an institutionally accredited organization with a national focus in three vertical markets including workforce, education, and economic development to help these organizations better engage business and industry individually and collectively resulting in economic growth and jobseeker and student success.
>
> Business Services Training and Training Facilitators Guide: this series of training modules get to the heart of building long-term relationships with customers, defining business services based on business needs, and recruiting and hiring in today's economy.
>
> Minnesota Department of Employment and Economic Development (DEED) Workforce/Business Services Development Specialist Certificate program run by the University of Minnesota.

- **Review, refine and disseminate the framework**: This involves further defining and disseminating an ideal statewide unified business services framework presented above, and ultimately adopting a framework that all state-level partners embrace and are willing to champion within their systems and spheres of influence.

> ## Promising Practices:
>
> [Ohio Business Resource Network Resource Information Guide](): The BRN Information Guide fully describes the purpose, structure and goals of the Network as well as strategies for holding partner meetings, business outreach and engagement, needs identification and other helpful start-up resources.
>
> [Expanding Business Engagement](): The US Department of Labor's Expanding Business Engagement Technical Assistance initiative engaged 13 state teams to improve business engagement at all levels. The project produced, and this site houses, several products including: a Business Engagement Framework & Companion Guide; a Do-It-Yourself (DIY) guide to convening partners for a boot-camp style in-person event; and a Do-It-Yourself (DIY) guide to convening partners for a boot-camp style in-person event.

- **Determine which elements of the framework must be reflected in any and all local implementation models**, and which may be modified or adapted to reflect unique local environments and needs. The goal here would be to set minimum criteria that should be uniform in all workforce areas throughout the state to ensure attainment of the system envisioned by the state and beneficial to businesses, while providing optimum flexibility to local areas to design their systems, outreach and related processes.
- **Resolve any issues of alignment between and among related statewide programs and initiatives**: The state team should check for alignment with other existing and planned initiatives in order to identify points of mutual support and potential areas of conflict. A good way to accomplish this is to develop an asset map of statewide programs and initiatives related to providing human resource-related services to businesses. It is most important to look at the state's economic development, community college, and workforce development systems; and ensure that stakeholders throughout the systems understand how different initiatives may (or may not) fit together and complement one another.

> ## Promising Practice:
>
> [The Colorado Talent Pipeline Report](): This report provides an overview of the state populace and demographics, discusses top jobs in the state and analyzes the skill sets needed to fill them, presents a progress report on career pathways and shares recommendations to advance Colorado's talent pipeline.

- **Address policy and funding barriers related to unified business services delivery**: There will also be a need to determine where partner systems' state-level policies, funding guidance and/or investment priorities, and related strategies and activities may conflict with one another or otherwise hinder successful implementation of the unified business services system. For example, disparate program performance measures across the agencies' systems could pose challenges to implementation of a well-aligned business services model. Exploring opportunities to align funding in support of the unified system will also be important.

> ### Promising Practice:
>
> Integrated Service Delivery Toolkit offers tools and resources for system leaders to utilize, including areas of focus such as policies, program changes, and IT solutions.

- **Marketing and Branding**: This team should discuss the potential value of creating and adopting a shared message for communicating to the business community the vision and strengths of the state's unified business services system. This message could embody and project all partners' commitment to truly unified service delivery and workforce solutions development for businesses.

  It is important to emphasize that merely adopting a shared message or brand communication has little value unless all partners in the state's business services system truly embrace the shared vision and actively implement it to deliver results for businesses. A shared message or brand must certainly tell a compelling story, but more importantly, it gains its meaning from the actions that support it. Put differently, partners in any state's business services system must deliver on their promises to businesses in order for a shared message or brand to be meaningful.

> ### Promising Practices:
>
> Regional Brand Strategies for Business Engagement Webinar: This webinar addresses how to apply the three "Ps" (process, portfolio, and packaging) to create a regional brand strategy among workforce, education and economic development partners to attract, retain and grow businesses.

b. Management of Business Intelligence

Other than the establishment of strong partnerships among individuals across agency lines, bringing an automated Customer Relations Management (CRM) system to the partnership is probably the second most important foundational element. For many years, states utilized Excel spreadsheets or other general-purpose database programs to try to "keep up" with business contacts. Some states even devised their own systems, which are generally now outdated, or "clunky", as one forward-looking state staffer reported. However, in recent years, a number of states have purchased stand-alone systems that meet defined business requirements for a common, statewide customer relationship management solution. Those business requirements might include the following:

- Track business lead, account, contact and activity information;
- Track business leads that are not currently receiving services with a Business Services Team;
- Track account level details for business, including a robust profile;
- Track contact information associated with these businesses;
- Track all emails, calls, meetings, tasks and follow-ups for these businesses;
- Provide full information sharing for team collaboration and executive management;
- Reports and Dashboards for business management, including company activities by workforce area, business liaison; new leads and engaged business by industry type, size, etc; and

- Additional custom reports and dashboards specific to the state's needs.

Partners will need to come to consensus around the best CRM platform for its needs and identify ways to fund it.

| **Promising Practices:** |

States contacted tend to use one of the following:

SalesForce**:** A multi-use system often used by economic development agencies, a number of respondents felt this system was a bit hard to figure out due to its multitude of functions.   Nevertheless, this is generally considered the state-of-the-art in the field of CRMs.   It bills itself as "the most complete way to put your customers at the center of everything you do".

B2B Engage: A stand-alone system developed specifically as a tool for sharing information and creating management solutions for business services. A number of states and local areas are using this system and the three spoken with as part of this project are very pleased with it.

c. Solutions-Based Service Offerings and Delivery

At the state level, partners' strategic plans and related policies and funding investments should reflect shared goals and processes for serving businesses. To accomplish this, all state grants, programs, and assets need to be coordinated, connected, and aligned. Once again, mapping assets as a team-based activity will provide information about the strengths and resources of the array of business services and can help uncover solutions. Once system strengths and resources are inventoried and depicted in a map, you can more easily think about how to build on these assets, address gaps and enhance alignment. This would be a major support component for local BSTs, who should also complete an asset map exercise.

| **Promising Practices:** |

Participatory Asset Mapping Toolbox: This toolbox presents research concepts, methods, and tools through topical guides and toolkits such as Community Research and Participatory Asset Mapping.
Illinois Asset Mapping Project: This report maps the state's available assets for effectively preparing of preparing youth for the 21st century workforce as well as strategies for using those assets to meet service delivery challenges.

One promising practice for outreach to businesses includes geographic "territory management" – a process that would identify key businesses and devise priorities and frequency of contact parameters. "Managing territory" here is meant to convey an approach to coordinated, cross-partner, and collaborative business relationship development, maintenance, and growth. Establishing a unified approach to managing the regional geographic territory will help reduce redundant contacts of businesses, improve productivity, and also drive BST members to engage with new businesses

Once decided upon, strategic, coordinated outreach to businesses should be led by the partner that has the best relationship with the company. This single point of contact (SPOC) is responsible for managing a specific client relationship – meaning that the SPOC assures customer satisfaction by simplifying, building awareness, and seamlessly bringing partners to the table as needed to meet each client need. This individual is the embodiment of the principle of functional alignment and organization across partners to best meet business' needs. The SPOC succeeds through collaboration, not through any direct control over any other partner staff or organization. In this way, whichever partner has the primary relationship with a business drives customer "ownership," but does not "own the customer."

Service offerings are not siloed or menu-driven but focus on delivering solutions to expressed business needs. The BST builds a portfolio of solutions with an action plan and accountability to businesses; it does not "dump" pre-packaged programs and processes on them. The SPOC uses the full services of the team to develop flexible, customized solutions, and then organize delivery. In this way, business is conceived of and treated as a partner rather than a customer.

For the purposes of development, BSTs may consider a range of service solutions that includes the following. "Bundling" services in this way forces personnel to think about solutions rather than individual services:

- Recruitment and Hiring Solutions – may include services such as:

  - Pipeline recruitment
  - Business and/or industry-specific recruiting events
  - Assistance in writing job descriptions
  - Taking and electronically posting job orders
  - Screening, Selection and Referral
  - Online access to resumes
  - Using facilities for recruitment and interviewing
  - Assessment and prospective employee testing

- Training and Education Solutions -- May include services such as:

  - Analysis of employee education and training needs
  - Training program development
  - Adult Basic Ed/General Equivalency Diploma/English as a Second Language for employees (on or off-site)
  - Work-based learning and training – discussed below under section D

- Transition Solutions -- May include services such as:

  - Layoff aversion
  - Labor/management teams
  - Employee support workshops
  - Employee retention and re-training services

- Information Solutions -- May include services such as:

  - Workforce and other labor market information

- ➢ Human resource consulting
- ➢ Tax credit information
- ➢ ADA, EEO and other workplace compliance information
- ➢ Unemployment Insurance information

- Support Service Solutions

Promising Practices:

Quality Business Services with Business Engagement and Customized Solutions:
The Business Engagement Collaborative Community of Practice provides cutting-edge resources, modularized content and facilitator guides on a variety of topics and tools that will help frontline staff engage and assist businesses, including competency models, Labor Market Information (LMI), and use of social media.
NoRTEC Business Services Plan: Northern California Rural Training and Employment Consortium (NoRTEC) leverages its unique status as a special district to secure resources and manage programs that go beyond the scope of traditional workforce development services, such as business startup services through the Business Resource Centers. This plan may provide other WIBs with information about structuring and managing programs and services that leverage existing programs but go well beyond them.

Finally, the SPOC must understand the company's business model and workforce needs, and also be aware of the Four Universal Needs of Businesses:

- ▪ Increase Profitability: Dependable Recruiting Pipelines
    - ➢ Entry Level
    - ➢ Alternative Labor Pools
    - ➢ Transitioned Workers
- ▪ Improve Productivity: Selection Based on Business' Criteria:
    - ➢ Competency/Skill Assessment
    - ➢ Probability of Retention/Advancement
- ▪ Reduce Liability:
    - ➢ Retention of Incumbent Workers
    - ➢ Placement of laid-off workers
- ▪ Ease of Use:
    - ➢ Single Point of Contact
    - ➢ Client Relationship Management

As an example of an innovative service that really speaks to these universal needs, the State of Minnesota determined via survey that 70 percent of businesses do not plan for human resource needs more than six months into the future. Now that massive retirements are occurring, many businesses are finding themselves in something of a crisis situation. To meet the need, the Department of Employment and Economic Development (DEED) worked with the University of Minnesota to establish the Talent Assessment and Workforce Planning workshop, a training

program for businesses in workforce planning. Costs for the university professor to develop and deliver the training are underwritten by industry associations and/or Economic development agencies or groups. The training has been successfully piloted with 45 businesses, and received very positive reviews and feedback from attendees.

The goal is to deliver training that provides businesses with the tools and knowledge to execute a talent assessment and workforce planning strategy. The day starts with a workforce planning consultant and professor at the University of Minnesota setting the stage for why businesses need to do workforce planning in today's economy. S/He helps them to understand what it is and how critical it is to their success. The definition of workforce planning provided is "a process by which you get the right people in the right roles with the right skills, at the right time at all levels of the organization". After the stage is set, attendees engage in an interactive 3-part session including organizational assessment, analyzing your workforce, and talent assessment and review. When they leave the workshop, businesses are provided with information and templates to make informed workforce decisions on the future of their company.

d. Emphasis on Work-Based Learning and Other Business-Focused Services

WIOA has brought significant changes, improvements, and increased flexibility to the array of work-based learning and training programs. This is largely because the evidence is in – work-based learning and training and other learning focused on as a result of business input is effective. The report "What Works in Job Training: A Synthesis of the Evidence" (2014) states that:

- Research clearly finds that workers and, to a greater extent, their employers, benefit from workplace training. Public policies have also been developed to fund or enhance workplace-based training, several of which appear to have positive employment and earnings outcomes for workers: (1) subsidized on-the-job training (OJT), (2) registered apprenticeships, and (3) subsidized jobs and transitional employment.
- And for youth in particular: "Occupation- and industry-based training programs, including Career Academies, show some promising employment outcomes for youth. Work-based learning, such as paid internships, cooperative education, and some transitional jobs programs suggest that low-income, economically disadvantaged youth are 2 successful in programs where they receive wages."

"Ready to Work: Job-Driven Training and American Opportunity," another White House report from 2014, touts Earn and Learn programs that offer work-based learning opportunities with businesses – including on-the-job training, internships and pre-apprenticeships and Registered Apprenticeships – as training paths to employment. "While classroom time can be important, individuals can quickly learn skills where hands-on experience in a work environment is integrated with classroom learning. Job-driven training programs aim to include work-based learning opportunities that best suit their participants. These can include paid internships, pre-apprenticeships, Registered Apprenticeships, and on-the-job training."

Promising Practice:

Job Training Programs: Informing Effective Implementation, Service Delivery, and Evaluation Capacity: This site includes three publications that offer reflective insights on federally-sponsored training programs and effective practices.

In their essence, publicly-funded work-based programs invite greater participation from businesses in the content and process of learning. To the extent appropriate and possible, work-based learning and training should be central features of service solutions offered to businesses and, for that matter, job seekers. It is essential that state workforce agencies update statewide policy related to the following work based training programs, and emphasize their ease-of-use and other advantages to local BSTs:

- Transitional Jobs
- Work experience/internship
- On-the-job training (OJT)
- Customized Training
- Incumbent Worker Training (IWT)
- Registered Apprenticeship

This will require cross-agency training to ensure that all partners are aware of the changes to these programs and to the solutions inherent in these approaches.

Promising Practices:

Additional work-based learning resources include:

- Occupational Training Leading to Credentials - the Success of Job-Driven Training
- Apprenticeship USA Toolkit
- Registered Apprenticeships and On-the-Job Training: Providing Work-Based Learning Opportunities
- Connecting to Registered Apprenticeship Pathways: Registered Apprenticeship Toolkit
- Pathways to Employment - Transformative Internships and Paid Work
- How to Maximize the Effectiveness of OJT
- Strategies for Implementing OJT Simply and Effectively
- Testing-the-Next-Generation-of-Subsidized-Employment-Programs
- Evaluation of the New Jersey Workforce Development Partnership Program: Customized Training Program
- Job Placement Strategy: Upskill/Backfill Demand Driven Strategies for Incumbent Workers

e. Accountability and Performance Measurement

In the past, workforce programs have mostly utilized jobseeker employment outcomes as a proxy for assessing the benefits of services provided to business. Later on, measures of market penetration and rate of employer return "business" were considered. However, with the general acceptance of demand and data-driven approaches to talent development, there is increased interest in more closely measuring the *value* that businesses feel they receive from system services. With the advent of sector strategies and WIOA, there is also new awareness of assessing how different approaches inherent in those elements that are driving system change – or not.

Maher & Maher developed a model for measurement that included these elements:

- **Systems Change** – Assess public partnership development and enhancement, performance improvement, resource sharing and utilization, sustainability
- **Value to Businesses** – Measure reduced turnover, enhanced retention, enhanced business productivity
- **Worker Outcomes** - Training completion, employment and employment retention, earnings, skill acquisition and credential attainment, career advancement

The idea is to establish quality goals and track achievement for each one of these elements. However, there are challenges with each. While systems change can be assessed more than anecdotally, quantifying measures would be difficult. Measuring value to businesses as discussed above would require that businesses provide extensive information, which is highly unlikely. Worker outcomes are trackable and important, but that brings us back to the beginning.

Supplementing worker outcomes with *an assessment of features that businesses value most,* including services they feel provide the greatest value in terms of meeting their goals, may have merit. For the purposes of this assessment, we may do well to follow the typology of service discussed earlier, so as to deal with bundled solutions as opposed to individual services:

- Recruitment and Hiring Solutions
- Training and Education Solutions
- Transition Solutions
- Information Solutions
- Support Service Solutions

Further, it is highly likely that any customer – or partner – will return if they perceive that they are receiving *optimum value* in resolving their challenges through the design and implementation of services/solutions, and measuring that return is possible, especially with an operating CRM.

In looking to the future, there are two truly positive signs. First, the talent development system – from Washington on down – is looking at this task of performance measurement very intensely, and the spread of sector-based approaches may actually render objective measurement more valid. Secondly, the Aspen Institute continues to work to refine its Business Value Assessment (BVA) – a methodology to assess the business benefits resulting from a workforce development program. The latest findings from this results-driven approach are discussed in "Results Driven: Using the Business Value Approach to Design and Assess Workforce Services."

Investors in workforce development programs will be interested in BVA because it helps them learn more about the value businesses derive from workforce program services, building the field's knowledge about effective practices. Also, building a base of knowledge about how business values outcomes is critical to ensuring that workforce services are relevant to industry and that businesses are motivated to use and advocate for these services. Perhaps most importantly, using this approach can help to improve and enhance the value of services that are offered to business.

IV.   Recommendations

As mentioned at the outset of this report, integration is a complex process. The following recommendations should be considered as a step-by-step process which will move the four core partners closer to alignment with each subsequent step. Supporting detail and resources are available in the best practices section of this reporting.

As the focus of this project was on the work of the WIOA core partners at the state level, our recommendations are directed at work that should be done by Commerce, IDES, DHS/VR, and ICCB.

a.   Develop a joint vision for unified business services in Illinois

As a result of this project, each of the four partners has an understanding of each agency's role, resources, and approach to providing business services. The next step is to develop a joint vision for unified business services in Illinois that articulates collaboration in such a way that all parties can support a business engagement process that eliminates multiple contacts and presents a "unified" system to businesses. The vision should be articulated in an agreement that all agencies sign.

In addition to the four core WIOA partners, local and regional stakeholders should be involved in the process to provide local and regional context, inform and help shape the vision for business services, and garner support for the effort. In addition, it is critical to identify and include business champions to ensure that the vision and subsequent planning are aligned with true business needs.

b.   Embed the vision for unified business services in the policy and planning initiatives

There are a number of current policy and planning initiatives underway at the state level which support further work in the area of unified business services. The WIOA planning that all partners are engaged in, plus the individual strategic planning efforts of OET and ICCB, all support the concept of a unified system. It is important to ensure that the vision of unified business services (and subsequent framework) is incorporated into and supported by all related initiatives. One possible way to do this would be to develop a communication document for sharing information about the vision (and ongoing work) as well as ensuring that the staff involved in these other initiatives are well versed and can articulate the unified services vision.

c.   Create a state framework for unified business services

Once there is consensus on the vision for business services, the same group needs to work to develop a state framework which will outline a unified approach to service provision including the following key elements:

- A sectors-based approach – As a result of WIOA regional planning work across the state, each Economic Development Region has identified target industry sectors. The work of the unified business services team in each region should align around their region-specific industry sectors.
- From transactional to transformative – Much of the current work with businesses across the state are based on a transactional approach – processing job orders, coordinating on-site recruitment events, and more. While these tasks will continue to be important components of service delivery, the overall engagement of businesses should take on a transformational focus that provides a platform for regular and ongoing dialogue.

- Regional in nature – Service delivery should be regional in nature and align with the regional designations identified by the Governor for WIOA, which are the 10 Economic Development Regions. The core partners should look at the pros and cons of aligning, to the extent possible, their geographic boundaries in order to remove this as a barrier to coordinated service delivery.
- Consideration of federal statutory mandates – Three of the four core partners have a federal mandate to provide specific, related services. Because these federal requirements are spread across three agencies, coordination is a bit more difficult and thus needs to be taken into account when developing the state framework.
- Coordinated approach – The framework should describe a coordinated approach to business services and suggest a process for determining which partner is going to serve as the point of contact for particular businesses/industries and how the point of contact will coordinate with other partners to meet business needs.
- Co-located staff – Building upon efforts already underway, continue efforts to collocate in WorkNet Centers to ensure maximum coordination between partners.
- Policies that each of the four agencies will adopt including coordinated program and staff performance measures. This may mean that existing policies/procedures need to be reviewed and revised to ensure alignment.
- Again, it is critical for local partners to be engaged in the creation of the framework to ensure that it provides enough guidance to be helpful but also allows enough flexibility to allow regional innovation and customization. Businesses, as well, need to be engaged in the creation of the framework.

d. Provide planning grants to the 10 EDR regions to process map their business services and operationalize the state framework

Coordination between staff and agencies involved in providing business services at the local/regional level is limited and it is critical that resources be made available to help regions take steps to align and streamline processes and resources. The key to successfully unifying business services across the state is to allow each region to develop and customize their own approach, within the guidelines set by the state. To seed the effort, planning grants should be made available to regions to help them map their existing process and asset map their current resources as well as create their own vision and process for providing unified services. Critical components of applications include a regional, sectors-based approach with all the partners who provide business services involved (including economic development) along with businesses.

e. Evaluate training needs and provide the same training for all partner/agency staff

Training on how to work with businesses is an important gap identified through this project. It is critical that all partners involved in providing business services have the same knowledge base and approach to working with businesses. The business services training that IWP is providing may very well be the perfect starting place to begin this effort.

An additional training component to consider is cross-training across programs. If business services staff going to feel comfortable allowing another program to represent them with businesses, then they need to know that the partner really understands what they have to offer.

f. Provide a single, statewide customer relationship management system that can be used by all partners at both the state and local level

Currently Illinois Job Link (IJL) is accessible to all WIOA core partners and could be used to track business outreach and activities, however IDES is the only agency who uses it for this function. Economic development partners cannot get access to this system, however, so IJL may not be a long term solution. The systemized use of a single, statewide customer relationship management system that all partners can participate in is critical to the success of truly unifying business services. Partners should share information about their business contacts in order to effectively coordinate services, minimize duplication, and understand the current status of the business's engagement with the workforce system.

g. Articulate the vision, framework, and regional contacts in marketing collateral

The state should develop core collateral which articulates the shared vision for business services, outlines the framework, and provides contact information for lead points of contact for each regional business services team. The collateral would include boiler plate language describing the state vision and framework but could also have a customizable area for each region to describe the unified service approach of their region.

V. CONCLUSION

WIOA provides an unpreceded opportunity to align and integrate business services to drive better outcomes for both job seekers and businesses. While the four WIOA core partners in the State of Illinois operate their programs in a complex environment, they demonstrated an interest in engaging in conversation about their individual approaches and perspectives on providing services to businesses. The information collected as a result of this project supports the agencies' understanding of each other's work and allows for identification of opportunity areas for streamlining and alignment. Leveraging what we know about key components of effective integrated business services from around the country, coupled with current initiatives and areas of opportunity within each agency, provides a strong foundation on which the four core partners can begin dialogue around the next steps identified in the recommendations section to realize a vision for unified business services in Illinois.

Maher & Maher
Investment Advisors for Talent Development.

VI.   Appendix A – IDES Narrative

IL Integrated Business Services Environmental Scan Narrative - IDES

a)   *Governance*

Vision:

The Illinois Department of Employment Security (IDES) encourages economic growth and stability in Illinois by providing employment services to Illinois residents and businesses, analyzing and disseminating essential Labor Market Information (LMI), and administering Unemployment Insurance (UI) programs.

Mission and Goals:

The mission and goals of IDES support the agency's role in providing business services, particularly the first goal.

1. Connecting our talented workforce to the education, training, and jobs necessary to keep Illinois' economy strong;
    a. Developing and maintaining these connections through active business outreach and engagement with jobseeker;
    b. Providing employment services to all Illinoisans through easily accessible technology and coordinated efforts with other service providers within a statewide network of employment centers;
    c. As the State employment office for Illinois businesses and workers, providing no-cost human resources solutions linking hiring businesses to qualified job seekers.
2. Producing, analyzing, and disseminating Labor Market Information; and
    a. Collecting and analyzing data covering employment and unemployment statistics, industry and occupation short and long term projections, occupational wages, and demographic characteristics of Illinois' workforce;
    b. Presenting employment and unemployment data and career and occupation information to the public so that Illinoisans can make informed educational, professional, and economic development decisions;
    c. Monitoring and forecasting national, statewide, and local economic trends to assist in the development of public policy.

3. Ensuring that eligible individuals receive the Unemployment Insurance benefits to which they are entitled.
   a. Efficiently and effectively administering these benefits to prevent the negative effects of economic downturns on businesses and the unemployed;
   b. Protecting taxpayers against waste, fraud, and abuse by ensuring the integrity of wage reports and unemployment claims;
   c. Collecting quarterly Unemployment Insurance Act taxes in a convenient and practical manner.

Authority to Issue Policy:

IDES has the authority to issue policy regarding business services as it is responsible for administering Title III activities for employment services under the Wagner-Peyser Act as well as Title 38 Chapter 41, Job Counseling, Training, And Placement Service for Veterans, of the United States Code. The IDES Business Services Division also administers and delivers business advantage programs such as Work Opportunity Tax Credit (WOTC) and Federal Bonding.

Mandated Activities:

IDES provides:
- Wagner-Peyser Employment Services including Labor Market Information
- Migrant Seasonal Farmworkers Monitor Advocate System
- Veterans Employment and Training Services
- Unemployment Insurance Services
- Trade Adjustment Assistance
- Department of Labor recognized Labor Exchange System (Illinois JobLink)
- Business Seminars
- Job Seeker Workshops (Job Search Assistance, Resume Writing, Mock Interviews)
- Business Outreach (HR Solutions)
- WOTC Program
- Federal Bonding Program
- TaxNet
- Job Fairs, Hiring Events and On-Site Recruitment
- Use of our Facilities (Private Interview rooms, Computers, Fax, Phone)
- Hire The Future (HTF)
- Re-entry Employment Service Program
- Unemployment Telephone Certification System
- Illinois Career Information System (CIS)
- Monthly Wage Reporting
- Misclassification Task Force

IDES is also mandated to work with federal contractors through the Vietnam Era Veterans' Readjustment Assistance Act (VEVRAA) which requires covered federal government contractors and subcontractors with contracts of $100,000 or more to list their employment openings with the appropriate employment service delivery system (ESDS) and that covered veterans receive priority in referral to such openings. The Office of Federal Contractor Compliance Program (OFCCP) has issued final rules, effective March 24, 2014.

b)   *Organizational Structure*

The IDES Business Services Division delivers business engagement, with a focus on servicing the veteran community. In addition to the Deputy Director of Business Services and the Business Services Outreach Manager, the team is comprised of Business Service Managers (4), Business Service Coordinators (15), Local Veteran Representatives (18), and Disabled Veteran Representatives (29). Each serve collectively to deliver services and programs to the business and job seeker community.

The Deputy Director of Business Services is based in Chicago and the Business Services Outreach Manager is based in Springfield, while the Business Services Managers, Business Services Coordinators, and Local Veteran Reps and Disabled Veteran Representatives are embedded in workNet Centers across the state. Joliet is the only remaining stand-alone IDES office.

IDES divides the state into five regions. Each region has 1 Business Services Manager, with the exception of Metro South Region. Regions with more than one Business Services Coordinator informally divide geographic territory and businesses.

IDES Staff are not organized by sector.

c)   *Approach*

IDES business engagement throughout Illinois is accomplished through personal business relationships with chambers of commerce, industry associations, economic groups and community-based organizations. Business workshops are held, highlighting topics such as the Understanding Employer Unemployment Rights, Work Opportunity Tax Credits (WOTC)/State Tax Credits, Federal Fidelity Bonding Program and Apprenticeship programs. In addition to daily business interactions, IDES provides training on Illinois Job Link (IJL), which is the official State labor exchange system which each State is required to maintain under federal law.

Has issued policy and/or procedures outlining the overall approach, staff roles/responsibilities and expectations regarding services to businesses:

IDES has not issued policy or procedures which outline the agency's overall approach to business services, however IDES does have policies regarding job orders and on-site recruitment events.

Has defined industry sectors:

Staff in the Business Services Division are participating in each region's WIOA regional planning team which are in the process of identifying target industry sectors. Previously, staff focused on businesses that provided the best return on investment to employment.

Uses a sectors-based approach:

Staff have not previously used a sectors-based approach. However, the current collaboration with DCEO and other partners at a state and local level through WIOA planning is an excellent foundation as IDES (and the other core partners) shift to a sectors-based approach.

d) *Staffing Roles/Responsibilities*

The following outline the roles and responsibilities of staff in the Business Services Division. Note that Business Service Coordinators work with all companies while LVERs only work with businesses on Veteran-related services and job placement. As a result, LVERs often refer businesses to the BS Coordinator if an business's needs can't be met through veteran-only hiring. DVOPs do not work with businesses, only Veteran jobseekers, but are part of the Business Services Division.

Business Service Managers:
- Coordinates the activities of the Regional Business Services staff
- Supervise BS Coordinators, LVER and DVOP staff
- Develops, recommends and implements changes in policy and procedures affecting Business Services Outreach
- Implements new programs to feature and promote coordinated employment service programs to agency clients, focusing on businesses.
- Directs and monitors State and Federal program reviews and evaluations.
- Directs the development, implementation, monitoring and control of the delivery of employment services to regional businesses, including special federally funded program initiatives mandated by Wagner-Peyser
- Attends community organization meetings that specifically address business needs and economic growth

Business Service Coordinators:
- Technical assistance to local offices
- Outreach activities that include Job Fairs, On-Site Recruitment and business centric events
- Seminars to educate businesses
- Maintain and support objectives of Business Services Outreach program
- Program evaluations to ensure accuracy and timely delivery of employment services to businesses in assigned regional areas
- Guidelines and procedures to enhance business use of employment services
- Develops techniques, tools, and procedures to improve field visiting activities
- Specialized training sessions for local offices, businesses, community and faith based organizations, elected officials, etc. within their coverage area
- Educational materials for business correspondence to solicit job openings
- Refers or accepts business job orders
- Disseminates Labor Market and job information to businesses and acts as a regional source for staff
- Job solicitation for individuals
- Educates businesses in their coverage area on IDES services and programs (i.e. Veterans, Migrant Seasonal Farm Workers, Youth (Hire the Future), TaxNet, International Registry, Legal Services, Labor Exchange, Labor Market Information

(LMI), Work Opportunity Tax Credit (WOTC), Re-Entry Employment Service Program (RESP), and apprenticeship programs)
- Assists businesses in applying for and receiving tax credits

Veterans Employment Representative 2 (LVER):
- Business outreach services on behalf of Veterans
- Provides guidance and implementation of standards and procedures for delivery of Veteran services according to Title 38 of the US Code, Chapter 41
- Individualized job development for Veterans
- Coordinates with DVOPs and other local office staff for job development referrals
- US DOL-Veterans' Employment and Training Service mandated training attendance
- Records all Business Services activities and Employment Services provided to Veterans in IL Labor Exchange system
- Explains tax credit programs and benefits to businesses
- Posts business position vacancies
- Coordinate with unions, apprenticeship programs, and business organizations to promote Veterans
- Job assistance workshops, individualized vocational guidance, and labor market information for Veterans
- Attends events for Veterans (i.e. Chambers of Commerce, Veteran Service Organizations, job clubs, etc.)

Veterans Employment Representative 1 (DVOP):
- Provides employment services for disabled veterans
  - Veterans outreach and registration
  - Work history assessment
  - Vocational guidance
  - Employment planning
  - Employability services
  - Referral and job placement
- Works with potential businesses and community organizations on behalf of disabled veterans potential employment
- Case manager for Veteran's Administration Chapter 31 Vocational Rehabilitation and Counseling (VR&C) participants and other veteran training programs
- Coordinates with federal VR&C program representatives
- Reviews work of local office staff assigned to assist veterans
- Provides special assistance to disabled veterans in need of special training for changes in vocations
- Maintains regular contact with veteran's organizations
- Job assistance workshops, individualized vocational guidance, and labor market information for disabled veterans

- Attends events for Veterans (i.e. Chambers of Commerce, Veteran Service Organizations, job clubs, etc.)
- US DOL-Veterans' Employment and Training Service mandated training attendance

Note that the Veterans Opportunity to Work Act amendments specifically prohibit DVOP specialists and LVERs from performing non-veteran related duties that detract from their ability to perform their statutorily-defined duties related to meeting the employment needs of eligible veterans. Additionally, Section 241 of the VOW Act added provisions that require the Secretary to conduct regular audits to ensure compliance with the limitations on the duties of DVOP specialists and LVERs and provide that the Secretary reduce funding to any state determined not in compliance.

e)   *Staff Professional Development*

Staff in the Business Services Division receive informal, internal training. IDES' Veterans' Employment Representatives attend training at the National Veterans Training Institute (NVTI) in Denver, Colorado within 18 months of hire and then periodically. This training can include a Business Outreach course. IDES' Disabled Veterans' Employment Representatives attend two federally mandated courses at NVTI: Facilitating Veterans Employment (FVE) and Intensive Services (IS).

f)   *Business Engagement/Services Data Tracking*

Currently, 32,000 unique businesses are registered in Illinois JobLink (IJL). All business engagement activities are entered in IJL. All WIOA partners who have a shared data agreement with IDES can be given "staff access" to IJL which would allow partners to read and enter information into business records.

Business services coordinators enter job orders and use the contact tracking system to document business contact. The contact tracking system allows users to enter:
- Date

- Type of contact
- Who (staff) made the contact and what agency
- Reason for visit
- Purpose (narrative)
- Result (narrative)

User can also set up a reminder to reach out to a business again.

g) *Management/Staff Performance Standards*

Reports can be run from IJL to monitor business visits, job orders entered and referrals made on job orders. Specific performance standards for managers and staff are unknown.

h) *Program Performance Measures*

The Business Services Division completes quarterly reports for USDOL which track Veteran served and placements in jobs with federal contractors. Performance measures related to business engagement are unknown.

i) *Agency-identified benefits/challenges to aligning business services*

IDES believes it would benefit greatly by coordinating outreach, stacking services and programs, engaging with local economic development officials, and presenting ideas in a back-and-forth learning environment. IDES feels that its product would be enhanced by having an overall comprehensive selection of other agency services and programs when outreaching to the business community. IDES will gain knowledge and be able to address business needs much more efficiently.

Aligning business services would increase the effectiveness of coordinated outreach efforts. Staff has been encouraged to participate at each level of the WIOA planning process, so that the final process, protocol and delivery will not be a surprise. Training will be the largest and most difficult issue to overcome.

j) *Current/future initiatives*

Internally, the Business Services Coordinator role is going through a LEAN process which may result in changes to the position. There is also discussion about alignment between the Business Services Division and the Employment Services Division of IDES.

VII. Appendix B – OET Narrative

IL Integrated Business Services Environmental Scan Narrative - OET

a) Governance

Mission:

The Illinois Department of Commerce and Economic Opportunity (Commerce) is the state agency that leads economic development efforts for Illinois. Commerce works with businesses, local governments and community organizations to advance economic development and improve the state's competitiveness in the global economy.

Commerce's Office of Employment and Training (OET), which is the primary focus for this report, is in the process of developing vision and mission statements and goals that clearly support serving businesses and job seekers through workforce development. OET's new mission statement is:

> OET advances the priorities of the Illinois Workforce Innovation Board by providing resources, policy, oversight, and technical assistance to support the workforce system in developing qualified workers that fulfills the needs of businesses.

Commerce's Regional Economic Development (RED) team coordinates economic development activities and outreach to business across the state and have a clear mission to provide businesses with better access to state services.

Commerce's Office of Entrepreneurship, Innovation and Technology manages the Illinois Small Business Development Centers (SBDCs) which provide a variety of consulting support services to small businesses. SBDCs mission statement of "to provide professional guidance for business growth" embodies its singular purpose of serving businesses.

Authority to Issue Policy:

In addition to an overarching mission and goals related to serving business, OET also has the authority to issue policy to its local system of Workforce Innovation Areas governing how businesses services are structured and delivered. To date, OET has issued a recommended framework around using a sectors-based approach but does not have a formal policy in place. LWIAs have the authority to issue policy which governs the operations of service providers operating under contract with the Local Workforce Innovation Board (LWIB).

Policy also governs the work of the RED team. Department of Commerce senior leadership issues and oversees policy which is followed by the RED team across the ten

economic development regions in the state as well as managers of economic development incentive programs.

Mandated Activities:

OET, which is the official grant recipient of funds through Title 1B of the Workforce Innovation and Opportunity Act (WIOA), is required to ensure that services to businesses are carried out as required at the State and Local levels. The State is responsible for the provision of Rapid Response services which are intended to quickly connect dislocated workers with reemployment services and businesses with services to avert or mitigate layoffs. OET staff provide Rapid Response services in coordination with the Local Workforce Innovation Areas (LWIAs).

The economic development programs which the Office of Business Development administer are created and governed by state legislation. Examples include tax incentives under the Economic Development for a Growing Economy Program, training under the Employer Training Investment Program and financial assistance through the Advantage Illinois Program.

The SBDCs are required to deliver services in accordance with rules and regulations of the Small Business Act of 1980. The primary purpose of the SBDC program is to provide information and guidance to assist and accelerate the growth potential of viable, long-term entrepreneurial ventures and small businesses in order to create and retain jobs.

The LWIAs are mandated through their role as One-Stop Operators and overseers of local service delivery to deliver services to businesses under WIOA, including:

- Customized screening and referral of qualified participants in training services to businesses
- Customized employment related services to businesses, business associations, or similar organizations on a fee-for-service basis that are in addition to labor exchange services available to businesses under the Wagner-Peyser Act
- Activities to provide business services and strategies that meet the workforce investment needs of businesses, as determined by the Board and consistent with the Board's local plan.

LWIAs are also directed through WIOA to engage in activities to improve:

- Coordination between workforce development and economic development and to promote entrepreneurial skills training and microenterprise services
- Services and linkages between the local workforce system and businesses, including small businesses
- Coordination between employment and training activities and programs carried out in the workforce area for individuals with disabilities

b)   Organizational Structure

State-level Staff:

OET has a Manager of Strategic Planning and Innovation located in the Program and Planning Division who engages directly with businesses in an effort to drive better service delivery at the local level. These staff operate out of the OET Springfield office. They are not organized by sectors.

OET also employs thirteen Rapid Response staff operating primarily out of either the Chicago or Springfield OET offices (although four are in Marion and one in Moline). These staff work directly with businesses and dislocated workers following the issuance of a Worker Adjustment and Retraining Notice (WARN) to connect both groups with workforce system services. They are not organized by sectors. With the exception of the Moline workNet Center, OET does not have state-employed staff engaging or serving businesses from local workNet Centers.

OET also contracts with the University of Southern Illinois to maintain the Illinois workNet portal. This site provides online resources for businesses such as labor market information, connections to recruitment and training resources and guidance around effectively using social media.

The SBDC Network employs over one hundred "business advisors" who provide one on one business advice and assistance to clients through their thirty centers located throughout the State. Many of these Centers are housed in local Community Colleges and universities as well as non-profit business services organizations such as chambers of commerce, local economic development corporations and community development corporations.

The RED Team is comprised of management and staff with expertise in various programs and incentives, including the ETIP, EDGE, Enterprise Zone and Advantage Illinois programs; as well as site selection, business finance and regional and account managers who coordinate economic development activities and outreach across the State.

Most LWIAs maintain staff or consultants to provide direct engagement and/or development services to businesses. Titles for these staff vary across the state, but examples include Business Services Representative, Employment Specialist, Business Services and Marketing Manager, and Business Account Manager. Functions vary, as well, although many engage in coordination of and outreach to businesses, handling grant application, and forming/leading working groups comprised of staff serving businesses across partners to develop a unified approach.

c)   Approach

Policy/Procedures:

OET has not issued policy or procedures outlining the overall approach, staff roles/responsibilities and expectations regarding services to businesses for either state or local level staff.

Coordination Across Partners:

LWIAs report many ways that economic development, education and workforce organizations collaborate on business engagement. These include participation of partners in the local WIOA boards, attendance at WIOA-related events, advising on both WIOA service delivery and training design to meet business needs, participating with determining employment projects, collaborative information sessions for business, providing labor market and workforce information to businesses and, in a few cases, involvement in site selection service for housing businesses.

Industry Sectors:

As part of the Regional WIOA planning process, OET worked with IDES and other labor market specialists to identify high-growth industries for each designated WIOA Region. This work was done in consultation with the RED team.

The RED team focuses on a number of industry sectors, including advanced manufacturing; agribusiness and food processing; life sciences and biotechnology; business and professional services; and transportation, distribution and logistics.

SBDCs have not defined industry sectors to focus on but do provide services to small businesses in advanced manufacturing; agribusiness and food processing; arts, A/V technology and communications; business management and administration; business and professional services; energy; finance; information technology; manufacturing and marketing.

All LWIAs have recently identified industry sectors that are determined to be high-growth for their Economic Development Region (EDR), although service delivery is not necessarily limited to those industries.

Sectors-based Approach:

While not a policy, OET has formally articulated a sectors-based approach for state-level staff engaging with business. OET special initiatives are also often driven by knowledge of key sectors as well as the goal to support a sectors-based approach at the local level. For example, OET recently finished overseeing a $12 million Workforce Innovation Fund grant from the U.S. Department of Labor focused on driving work-based learning that leads to employment in manufacturing. This project involved extensive collaboration with the LWIAs to support their work with local manufacturers.

Members of the RED Team are assigned by geography rather than sectors, however extensive knowledge of the growth industries is a foundation of their work. Team members work closely with local and regional economic development organizations to identify opportunities to align the State of Illinois' efforts with region and industry priorities and maximize visibility of State of Illinois marketing within industry partnerships. RED Team members also are heavily involved in regional planning efforts including the identification of target industries to drive strategic business engagement across partners.

The Illinois SBDC Network serves a broad range of market sectors, however their proactive marketing efforts are targeted to the following seven high potential clusters, each made up of component industries which highlight strong interconnection with the statewide economy:

- Clean Energy
- Information Technology/Digital Media/ Telecommunications
- Agribusiness
- Food Processing and Technology
- Biomedical/Biotechnical
- Machinery and Fabricated Metal Parts Manufacturing
- Transportation and Logistics
- Advanced Materials

When applying to serve as an SBDC, an organization must identify a specific market sector and demographic focus as well as its strengths for delivering services to that group.

Many LWIAs do take a sectors-based approach to their service delivery or an approach that, at a minimum, targets efforts toward high-growth industries. For example, the Cook County Workforce Partnership targets area businesses who are hiring and/or expanding but will also support job development for any business who is a fit for their job seeker customers. They have historically focused outreach on key sectors, such as Manufacturing, Health Care, TDL, IT and Hospitality. They have also invested in aligning their youth programs with the needs of local manufacturers and health care providers and steering youth into entry-level jobs in those industries.

One LWIA, Will County, noted it receives referrals from economic development staff to work with key industries in the area. Winnebago, Boone and Stephenson Counties note an active partnership with economic developers as well as high school career centers, Chambers of Commerce, Board members, training providers, headhunters and trainees that helps inform selection of the businesses to target. Only one LWIA, DuPage County, specializes staff within industry sectors which include Manufacturing, Information Technology, General Office and Health Care.

d)   Staffing Roles/Responsibilities

Outreach to businesses:

OET Program and Planning staff frequently meet with businesses and associations for insight into how to improve local service delivery. Some business relationships originate through either the Illinois Workforce Innovation Board or one of its task forces or a local workforce board, some evolve from a grantor/grantee relationship either directly or through a local workforce area, and others develop organically through staff presenting information or attending various workforce and economic development meetings attended by business leaders or industry associations.

The following are examples of projects that typically include engagement with business:

- Talent Pipeline Management (TPM), including TPM Rapid Response grants, which involve business-led collaboratives, communicating occupational competencies, talent flow analysis (back mapping) to determine from where businesses source their best candidates, and developing business-centric performance metrics to measure the impact on improving skill gaps,
- microenterprise and entrepreneurial training and support programs,
- utilization of effective business intermediaries,
- layoff aversion grants and strategies,
- activities to improve linkages between workforce partners, and
- other business services and strategies that better engage businesses in workforce investment activities to make the workforce development system more relevant to the needs of the State and local businesses.

The OET Rapid Response staff work with businesses undergoing layoffs to coordinate services to the affected workers. Their work entails building relationships and working with businesses to mitigate the impact of the layoffs and also determine if workforce training services could forestall future layoffs. The Rapid Response Team that work collaboratively includes OET Rapid Response Staff, IDES Staff, Local Workforce Area Staff and other partners, as appropriate. These partners coordinate efforts to make impacted workers and businesses aware of available services, eligibility requirements and the application process.

Specific Rapid Response activities include:

- Immediate and on-site contact with the business, representatives of the affected workers and the local community;
- The provision of information and access to unemployment compensation benefits and programs
- The delivery of other necessary services and resources to support reemployment efforts for affected workers;
- Partnership with the local board(s) and chief elected official(s) to ensure a coordinated response to the dislocation event and, as needed, obtain access to state or local economic development assistance.
- The provision of emergency assistance adapted to the particular layoff or disaster;
- Developing systems and processes for identifying and gathering information for early warning of potential layoffs or opportunities for layoff aversion;
- Developing and maintaining partnerships with other appropriate federal, state and local agencies and officials, business associations, technical councils, other industry business councils, labor organizations, and other public and private organizations, in order to:
  - Conduct strategic planning activities;
  - Develop mechanisms for gathering and exchanging information and data relating to potential dislocations;
- Delivery of services to worker groups for which a petition for Trade Adjustment Assistance has been filed;
- The provision of additional assistance and funding to local areas that experience disasters, layoffs, or other dislocation events; and
- Provision of guidance and financial assistance as appropriate, in establishing a labor management committee.

RED Team members meet directly with Illinois businesses, or those considering relocation to Illinois to connect them with public programs and services that may help their business grow. They do not handle transactional, labor exchange services such as job matching or job fairs but rather connect businesses with those services in the local areas.

SBDC staff provide one-on-one consultation support for small business owners or those looking to start a small business. They also do not engage in labor exchange services. Services provided by SBDC staff include:

- One-on-one business advice and management assistance.
- Assistance with the development of business plans.
- Help with accessing market information and the development of marketing plans.
- Assistance with accessing business financing programs.

- Assistance with financial analysis and planning.
- Access to business education and training opportunities.
- Specialized services in technology, innovation and entrepreneurial development.

LWIA business services staff responsibilities vary across the Illinois workforce system but typically include outreach to businesses, managing on-the-job training contracts and incumbent worker grants to companies, marketing (often via website and social media), and providing information to companies regarding the offerings available through the workforce system.

One LWIA, located in DuPage County, which co-locates local economic development WIOA and RED team staff, noted several business services roles that go beyond the basic functions, including Employer Outreach Specialists who focus solely on building business relationships. These staff target small to -mid-size companies that are hiring or expanding and may benefit from workforce system services. DuPage County Workforce Development Division also employs Employer Marketing Specialists and Employer Liaisons. The Marketing Specialists manages the website, all social media accounts, blog and marketing materials for both businesses and job seekers. They also organize job fairs and recruiting events held monthly at workNet DuPage. The Employer Liaisons handle incoming job leads and disseminate them via blog and their network of contracts. The Liaisons also contribute content to the blog and conduct outreach to businesses who are hiring. This LWIA notes they have achieved greater outcomes reaching and serving businesses through their co-location and collaboration across partners as well as targeting of significant resources to business services.

e)   Staff Professional Development

Currently, OET staff do not receive formal training on business engagement. RED Team members receive training through internal staff meetings and SBDC staff also receive training on effective engagement and service delivery to businesses.

IL SBDC Network Center Directors, advisors and professional staff are required to obtain the initial Certified Business Development Advisor designation within the first two years of joining the program. The certification is maintained through the Illinois Entrepreneurship and Small Business Growth Association (IESBGA) and focuses on developing competencies to deliver the services outlined previously in this report.

Most LWIAs noted they do not provide formal training on business services to staff, but do provide informal training done through internal staff meetings. One LWIA stated a need for training for business services staff to ensure they "can speak the private sector language fluently." The Illinois Workforce Partnership has responded to this need by sponsoring training for front-line staff on delivery of effective business services training to be held in June, 2016.

f)   Business Engagement/Services Data Tracking

OET does not use a Client Resource Management (CRM) system to track its engagement with business. RED Team staff use a tool called Microsoft Dynamics which supports daily input and tracking. The SBDC staff use a CRM called Neoserra System by Outreach Systems, Inc. Access to or data from these systems are not presently shared across partners.

The Illinois SBDC Network uses a tool called Neoserra System by Outreach Systems, Inc. to track their business engagement and service provision. Neoserra (formerly WebCATS) is a web-based client activity tracking system. Its CRM database allows the Illinois SBDC Network to track client information, consultation services, training programs and client performance and successes. Neoserra also tracks business advisor activity, professional development, outreach efforts and center performance.

When looking at SBDC Network data tracking and potential sharing it is important to note that the Small Business Act that governs the program requires strict confidentiality. All SBDC staff sign a confidentiality agreement and conflict of interest form and cannot share any client-related information without expressed approval from the client.

Several LWIAs report they are using a CRM to track business engagement on a monthly, weekly or daily basis. Tools identified include amoCRM, Microsoft Dynamics, Netsuite, Sage, Salesforce and in some cases, a simple database. A few other LWIAs note they are interested in adopting a tool and are in the research phase to identify the right product for their local area.

g)   Management/Staff Performance Standards

OET managers and staff do not currently have performance metrics regarding their engagement with and services to business.

h)   Program Performance Measures

As the grant recipient for WIOA, OET will be held accountable for achieving any performance measures defined in the Final Rule, including those regarding services to businesses. The WIOA Final Rule has not yet been issued, however, proposed measures in the Notice of Proposed Rulemaking (NPRM) include participant job retention after placement, repeated use of program services by businesses and the number or percentage of businesses using core program services out of all businesses in the area or State. Because OET is not the primary provider of business services, they manage performance by providing monitoring, oversight and technical assistance to support LWIA achievement of these performance standards.

The proposed measures listed above for OET will actually be surpassed, met or failed through the day to day operations of the LWIAs. Once final business services measures

are defined under WIOA, OET will advise LWIAs of the performance levels they must achieve for each measure.

Many LWIAs already have their own performance measures around engaging and serving businesses. Examples of measures include the number of job fairs held, number of job market presentations done within the workforce area, number of resumes submitted to businesses, and number of new companies brought into the workforce center for the year.

Regional Economic Development team success is measured by the number of jobs created, the total capital investment secured and the timeliness of service delivery.

IL SBDC performance is measured through tracking and reporting on several indicators including:

- Number of new business starts
- Number of business expansions
- Dollar value of debt financing
- Dollar value of non-debt financing
- Number of consultation clients
- Hours of one on one consultation
- Number of Long Term Clients
- Number of formal client pitches to investors
- Number of successful intellectual property filings
- Average hours per client
- Number of business training events
- Number of hours of professional development
- Number of success stories submitted

i)   Agency-identified benefits/challenges to aligning business services

The RED Team notes that aligning business services would remove the barriers for information sharing and establish best practices for reciprocal inclusion of all staff in all business service delivery meetings. Challenges remain, however, including the alignment of priorities which are sometimes different due to the nature of funding sources, as well as alignment of cultural approaches to clients.

The SBDCs cite the more consistent and ongoing exchange of information and networking as a benefit to aligning business services yet also noted the lack of state funding to the budget impasse as significant challenge to all areas of implementation, including collaboration.

LWIAs report that geography and other factors make breaking down silos an ongoing challenge. Also, some other core partners do not have local decision-making control to negotiate and determine policy and protocols which limits their ability to align services with other agencies at the local level.

Suggestions for overcoming challenges include:

- Capitalizing on a new Local Workforce Innovation Board structure that includes all key partners. This comprehensive membership eliminates duplication of meetings for businesses and partner agencies.
- A statewide vision or elevator pitch that all partners agree to use when conducting outreach to business at the local level to ensure consistency
- Closer alignment of business services among core partners to enhance impact and provide greater flexibility.

j)   Current/future initiatives

The Illinois Workforce Partnership (IWP) which is an association of the Illinois LWIAs has planned a series of webinars for State and local areas staff around key topics, including business engagement, which will be held in June, 2016.

VIII.   Appendix C – DRS Narrative

IL Integrated Business Services Environmental Scan Narrative – DRS

a)   Governance

Mission:

The Illinois Department of Human Services' Division of Rehabilitation Services (DRS) is the state's lead agency serving individuals with disabilities through the Vocational Rehabilitation (VR) program. Through that program, DRS helps people with disabilities find quality employment that pays a living wage and offers a chance for advancement. DRS' mission statement articulates both a job seeker and business focus. The statement is as follows: "DRS is committed to assisting people with disabilities in finding quality employment. DRS also value Illinois businesses as our partners and offer a variety of no-cost individualized services that bring businesses and qualified applicants together every day."

Authority to Issue Policy:

DRS has authority to issue policies and procedures which govern how their staff operate across the State.

Mandated Activities:

DRS has two specific requirements which mandate activities. Those include the new "Services to Business" regulations as set forth in the Workforce Innovation and Opportunity Act (WIOA) and the requirement that each State's VR program has a designated business point of contact to the National Employment Team (NET).

Under the WIOA "Services to Business" regulations, DRS must do the following:

- Educate and provide services to businesses who have hired or are interested in hiring individuals with disabilities. Those services include providing training and technical assistance regarding the employment of individuals with disabilities, including disability awareness, and the requirements of the Americans with Disabilities Act of 1990 and other employment-related laws.
- Work with businesses to provide opportunities for work-based learning experiences (including internships, short-term employment, apprenticeships, and fellowships), and opportunities for pre-employment transition services.
- Recruit qualified applicants who are individuals with disabilities, train employees who are individuals with disabilities and promote awareness of disability-related obstacles to continued employment.
- Provide consultation, technical assistance, and support to businesses on workplace accommodations, assistive technology, and facilities and workplace

access to enable the businesses to recruit, job match, hire, and retain qualified individuals with disabilities.
- Assist businesses with utilizing available financial support for hiring or accommodating individuals with disabilities.

The NET initiative, which is supported through the Council of State Administrators of Vocational Rehabilitation (CSAVR), designates specially-trained VR Counselors to offer business customers, in the private and public sectors, a designated single point of contact to connect with qualified applicants, resources and support services in their local area, multi-state or national marketplace. The NET provides employment supports in all 50 states, the District of Columbia and the territories. Each state, including Illinois, has a NET point of contact who receives referrals from the National Business Manager and NET points of contact in other states for identified businesses.

b)   Organizational Structure

DRS employs both Rehabilitation Counselors and Employment Resource Specialists (ERS). Rehabilitation Counselors work directly with people with disabilities to help them find a job or get ready to go to work. They also make sure that people have the supports they need to stay on the job. It is an essential function of the Rehabilitation Counselor to engage directly with businesses on behalf of individual clients, but ERS are specifically charged with engaging with businesses for the purpose of understanding their current and future needs and matching those with clients. They also work to foster an ongoing relationship with business customers to ensure consistent support and services.

VR Counselors are located across the state in both IL workNet centers and stand-alone offices. Thirteen workNet centers have VR Counselors co-located. These sites include Champaign, Peoria, Mt. Vernon, Harrisburg, Quincy, Rockford, Wood River, Marion, Decatur, Ottawa, Sterling, Arlington Heights and North Broadway.

There are five ERS located throughout the state. Those sites include East St Louis, Benton, Wood Street in Chicago, Peoria, and Wrightwood. ERS are not co-located in IL workNet centers. In regions where DRS does not have an ERS the services are either covered by the local DRS staff or sometimes the NET Point of Contact. Illinois' NET point of contact is John Marchioro who is located in Springfield.

c) Approach

Policy/Procedures:

Although DRS does have procedures that ensure uniformity of services across the state it is important to note that each region may have specific needs and offices have the discretion to design services to meet those needs.

Coordination Across Partners:

DRS is connected with its workforce partners to discuss business engagement through Integrated Resource Teams (IRT), ongoing WIOA regional collaboration meetings and Disability Employment Initiative partnerships. In addition, DRS gains a great deal of information from its workforce partners through sharing of labor market information.

Industry Sectors/Sectors-based Approach:

DRS staff are not assigned by industry sector and, at this time, no sector-based approach is in place. They do, however, select businesses to reach out to through current Labor Market Information (LMI), the customer's identified area of career interest, outreach from the business community and business referrals.

The NET Point of Contact works primarily through referrals from the National NET Business Manager as well as direct contact from business, including federal contractors.

DRS, however, has developed some partnerships through the Department of Commerce and Economic Opportunity's DEI grants that fall into some specific sectors. DRS also has a project underway to receive technical assistance from national consultants (provided by the VR program) to better engage business.

d) Staffing Roles/Responsibilities

DRS staff (either VR Counselors or ERS) may provide the following services to business customers:
- Pre-employment services
- Recruitment and retention support
- Training for companies' staff on disability awareness and employment laws
- Diversity program strategies (i.e. supporting companies in their efforts to become more diverse through the employment of people with disabilities)
- Consultation and technical assistance (i.e. working directly with companies that may need help accommodating and supporting employees with disabilities)
- Financial support (ex. VR may pay businesses to do a pre-employment evaluation of a client or pay for the cost of training clients)
- Employee assistance
- Access to VR support across states, local areas or nationally

Outreach to businesses:

DRS staff engage in outreach to businesses, both through ERS who look at strategic partnerships and VR counselors who engage on behalf of individual clients. ERS conduct initial listening sessions with businesses to collect a needs assessment based on short and longer term goals of the business. This information is then delivered to offices in their region most impacted by the partnerships via email, conference calls, webinars and face to face company tours and meetings. ERS continue to follow through by identifying specific services which the businesses find appropriate and coordinating delivery of those services.

The NET representative acts as the point of contact to businesses who are referred through the National NET Business Manager or other States' NET Point of Contact. These business responses are high priority and initial inquiries are responded to within 48 hours.

e)   Staff Professional Development

Currently, DRS staff do not receive formal training on business engagement, although an initiative is underway to provide technical assistance to the agency to improve capacity in this area.

f)   Business Engagement/Services Data Tracking

DRS does not currently use a tool or system to track business engagement, however they are in the process of building one in-house that will be linked to the DRS online case management system.

g)   Management/Staff Performance Standards

Performance standards for staff are not developed statewide but, rather, on the regional level. Some metrics include:

- Meeting with a set amount of businesses per month in their assigned area to ascertain types of employment available
- Meeting with VR Counselors in their offices monthly to discuss qualifications for business hiring
- Working with local offices on Work Support Group activities
- Working with local offices on Job Fairs and Community Events
- Meeting with office supervisors and regional supervisors quarterly to discuss
- Employment issues relevant to the region

h)   Program Performance Measures

DRS notes several overall program goals mainly focused on client outcomes including average wage, retention rate and enrollment in community college or university. The goals do also include a specific goal to serving businesses called "Expand Business Partnerships" which calls for an expansion of the number of business partnerships developed in conjunction with the National Employment Team (the NET) by 25 percent compared to the number for FY2014. (Note: the baseline figure is 40 NET-related business partnerships.) Another measure called "Enhance Workforce Partnerships" calls for increasing the number of VR customers receiving vocational training funded all or in part through WIOA funds to 500; and of that number, at least 300 will achieve an industry-recognized credential as a result of participation in training.

i)   Agency-identified benefits/challenges to aligning business services

DRS noted it could benefit from the alignment of core partners through the referral of WIOA candidates for services and the additional access to partner LMI data. In addition, ERS could also benefit from the sharing of business partnerships in different sectors and the related discussion with training providers and businesses around development of training programs that meet business needs.

 DRS-identified challenges include:
- Using consistent messaging with business customers,
- Partnering in a way that addresses preferred high growth sectors, as well as more unique sectors and careers based on individualized customer choice;
- Finding ways to connect available data tracking and shared information.

j)   Current/future initiatives

As mentioned above, DRS is receiving technical assistance through a national effort to improve business engagement across the VR program which should increase staff capacity in this area. This project started in November and is scheduled to last through next year. The development of a CRM tool, also mentioned above, will provide a better way to track engagement with different industry sectors.

IX.   Appendix D – ICCB Narrative

IL Integrated Business Services Environmental Scan Narrative - ICCB

a)   *Governance*

The Illinois Community College System is the third-largest community college system in the nation and covers the entire state, with 48 colleges, including two multi-community college centers, in 39 community college districts. Community colleges serve nearly one million Illinois residents each year in credit and noncredit courses and many more through their public service programs.

Mission:

As the largest provider of public workforce training in the state, community colleges ensure that all Illinois residents have educational and training opportunities leading to high-wage and high-growth employment. Responding to the needs of the community is a core mission of the Illinois Community College System.

Goals:

In 2015, The Illinois Community College Board (ICCB) engaged in a strategic planning process designed to ensure the community college system remains a leader in the complementary fields of workforce training and education and becomes ever more responsive to changing business and student needs throughout the state. ICCB, along with its' partner DCEO, hosted a series of eleven Regional Forums across the state designed to gather key input and insight from stakeholders – most critically, businesses – regarding priorities for ICCB and the community college system based on the economic, educational and business landscape in their region. Through the Forums, ICCB also hoped to ensure broad understanding and validation of the vision for a talent development system and role of the community college within that system. Forums were held in each of the state's 10 economic development regions – two for the Chicago area – and Forum attendees included secondary and postsecondary educators, workforce and economic development managers and staff, and businesses.

One of the five critical challenges identified as a result of the Regional Forums relate directly to the focus of this report:

- **Public Partners' Engagement and Alignment with Business:** Partnering with education and training providers, and with economic and workforce development, needs to be easier and more seamless for businesses and must provide more value.

As a result, the "Strengthen Connections among Public Partners and Engagement and Alignment with Business" strategic theme will be developed into a goal with objectives and activities developed as part of ICCB's Workforce Education Strategic Plan which will be developed in the later part of 2016.

Authority to Issue Policy:

ICCB utilizes the advice and counsel of all constituent groups of the community college system in establishing policies necessary to implement state statutes and follows a set of administrative rules found here: https://www.iccb.org/iccb/wp-content/pdfs/manuals/systemrules10-08.pdf

ICCB, however, does not issue policy to the community college system on matters related to providing services to businesses through corporate training centers.

Mandated Activities:

ICCB does not mandate business services activities or currently offer or coordinate any grant programs related to business services/corporate training.

b)   *Organizational Structure*

ICCB does not provide services directly to businesses. Business-related services are provided by <u>local staff</u> in each community college. ICCB developed a survey to collect information on business services and received 11 responses, which were used to inform this project.

State-level Staff:

While ICCB does not directly work with businesses to provide services, the Senior Director for Workforce Development in the Workforce Division of ICCB has a number of roles and responsibilities which support local community colleges in their efforts to provide training to businesses including:
- Information sharing regarding WIOA
- Sharing/coordinating grant opportunities, when available
- Attending weTRaIN (Illinois Community College Training Resource and Information Network) and Illinois Council for Continuing Education and Training (ICCET) events

Local-level Staff:

According to weTRaIN, (Illinois Community College Training Resource and Information Network, of which ICCB reports most Corporate Training staff are members of) there are over 150 individuals employed by community colleges across the state who provide services to businesses through Corporate Training Centers/Business and Industry Centers.

Organized by sector:

The staff employed in Corporate Training Centers/Business and Industry Centers in community colleges are not organized by sector. However, each college may focus on specific sectors depending on the businesses and employer's needs in their community college districts.

c)   *Approach*

Has issued policy and/or procedures outlining the overall approach, staff roles/responsibilities and expectations regarding services to businesses:

ICCB has not issued policy or procedures outline the overall approach that community colleges should take in their Corporate Training Centers. Policies and approach are developed individually by each community college.

Has defined industry sectors:

Corporate Training Centers provide market-driven services based on local business needs. Several survey respondents indicated that they have target industry sectors, but this is not consistent across the state.

Uses a sectors-based approach:

In the survey administered by ICCB, several Corporate Training Centers mentioned participating in a business services team, participating in regional WIOA planning, and identifying target industry sectors with workforce partners. This level of interaction is not consistent across the state, however.

d)   *Staffing Roles/Responsibilities*

Based on survey results, it appears that corporate training staff generally provide the following services:

- Customized training
- Consulting
- Test development
- Public workshops
- Facilitating
- Coaching
- Job Fairs

e) *Staff Professional Development*

Questions related to professional development were not included in ICCB's survey. However, ICCB reports that many corporate training staff are members of weTRaIN, which provides professional development.

f) *Business Engagement/Services Data Tracking*

ICCB does not track business engagement/services data. Each Corporate Training department has its own process and tools for data tracking. Based on survey results, a sample of methods include:
- Excel spreadsheet and Outlook calendar
- Lumens B2B through Augusoft
- Excel spreadsheet with Constant Contact
- Microsoft Access
- ACT

Some departments are currently considering using:
- Insightly CRM
- Salesforce

Data is not shared outside of the Corporate Training departments.

g) *Management/Staff Performance Standards*

Unknown

h) *Program Performance Measures*

Each Corporate Training program can define their own performance metrics. Corporate Training programs are self-funded and therefore most likely have financial goals to meet. Other, specific performance measures are unknown, however.

ICCB is currently collecting data from Corporate Training programs on metrics including:

- How many businesses they had contracts with and provided customized training for
- Net revenue
- # of workshops provided
- How many are employed in Corporate Training programs

Results from this survey are not yet available. Additionally, the survey is voluntary so participation rates could be low.

i)   *Agency-identified benefits/challenges to aligning business services*

The following were identified by ICCB and community college survey respondents.

Benefits:

- We can help each other better serve our local businesses and industry as a team vs. individually/independently.
- More partners would bring an increased level of participation and hopefully, more businesses seeking development/education for their employees from the colleges.
- Understanding the rules and regulations with each partner and getting everyone together to work on a specific project and follow through with it.
- Advantage for business (not as many people knocking on door)
- Marketing corporate training services through the partners

Challenges:

- Mixed financial goals. Our college requires that our Continuing Education department (that includes Corporate Training) generate its own revenues sufficient to cover all of its operating costs each year. This includes direct costs of training plus the salaries and benefits of all Continuing Education employees plus departmental overhead costs. The core partners mentioned in # 11 are almost exclusively grant funded or supported by funds provided by our college. Therefore, the challenge for Corporate Training is to realize its financial goals when these goals are different from those of the other core partners.
- If business services are unified, it is important that those meeting with businesses are committed to sharing all resources and programs equally and without biasing businesses on which services to use.

Opportunities:
- Measure impact of corporate training

j)   *Current/future initiatives*

- ICCB's current strategic planning work includes elements of service coordination and will enhance the support and dialogue about this issue.
- The corporate training report that is underway within ICCB contains useful information about the services being provided across the state.

Illinois Community College Districts