



ETA Sector Strategies Technical Assistance Initiative:
BRIEF SAMPLE PROTOCOL
Virtual Business Engagement Academy Opening Session



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Mock Industry Meeting

SAMPLE PROTOCOL

THIS DOCUMENT IS INTENDED AS A BASIC INTRODUCTORY PRIMER ON FACILITATING A SECTOR PARTNERSHIP MEETING. THE INFORMATION IS SET AS A SAMPLE FOR THE VIRTUAL BUSINESS ENGAGEMENT ACADEMY'S OPENING MOCK INDUSTRY MEETING

Why are we bringing together business leaders, along with partners from workforce, education, economic, and community development around a series of industry sector meetings?

To provide a return on investment for employer participation in this effort through the development of a talent pipeline (why employers are here), to validate current qualitative and quantitative data findings regarding the industry (what the workforce needs are), to gather additional information to inform a sector project (how workforce needs might be addressed), and to gather information regarding the prioritization of activities to address business needs (when solutions might be provided, or urgency of need).

Whom should I invite? (for more information, make sure to attend Core Session 2, or download the recording and presentation after the event)

This will vary significantly based on the industry as well as the region. If this is a first round of these meetings, you may want to consider selecting employers which represent large, medium-sized, and small companies, with representation from primary industry sub-sectors, and representing a geographical cross-section (if this is a regional or state-wide initiative). Understanding the diversity of issues prevalent within an individual industry will provide you with a better idea of the needs across organizational types.

The occupational categories of individuals to be invited to be participants will vary based on the needs of the specific industry you are addressing, and the size of the company, but may include:

- ❖ CEO, President, or General Manager
- ❖ Director of Human Resources or Workforce Development



- ❖ Key Operations Managers
- ❖ Frontline Managers

What if workforce, education, community, and economic development partners want to attend the meeting with employers?

Partner organizations may want to be invited to hear directly from employers. This should be with much thought and planning ahead of time. Often, the goal of a first meeting like this is to hear from employers, not to have partners propose solutions. The goal is for the voices of the business to be heard. There should be a follow up meeting of partners to discuss their response to what we hear from employers.

The primary speaking roles at the table should include the employer and the facilitator. Representatives from the board, labor, education, industry-specific associations, not-for-profits, and local government may be invited on a case by case basis depending upon industry connections. This meeting is planned for the purpose of gathering information, in the format of a focus group, the nature of which is included in the following protocol.

You may also want to consider providing an opportunity for networking after the meeting.

What should be shared with employers before the meeting?

You will want the business leaders to have a clear idea of how they will spend their time, and what they can expect from the meeting. You may want to consider sharing the following at least a week in advance:

- ❖ 1-2-page document with an overview of the initiative, purpose of the employer meeting, and ROI for this meeting
- ❖ 3-5-page document on the industry (for more information, see sample data packet for the Opening Session)
 - Quantitative background summary of data on industry and occupations (provided by Labor or other data partner – but make sure to only use a consistent source for your data)
 - Qualitative summary of what you believe to be key industry challenges, subsector areas of focus, and possible projects planned or inventory of industry related projects already being implemented
- ❖ List of questions you will plan to ask them

WHAT HAPPENS DURING THE MEETING?

Sample Meeting Agenda

- ❖ Welcome and introductions
- ❖ Old business – recap on last meeting
 - This is your opportunity to reinforce any conclusions or agreements the group came to in the last meeting
 - This is also where you can discuss the progress you have made, and the follow up on items you promised to the group, and give new members a clear sense of where the group is, and the direction you are all going
- ❖ What does the industry look like today? (industry data deck sent prior to meeting)
 - This is an opportunity to share not only the quantitative data you have identified from partners about what has happened in the past with regard to occupational changes, but also any information you have gathered directly from employers about what is happening in the present with current and projected future demand
- ❖ Industry needs discovery discussion
 - This is where you want to make sure that you are truly listening to employers about their needs. Make sure you have informed employers of what to expect prior to entering the meeting
- ❖ Synthesize key learnings
 - This is where you can draw linkages between what different members have said, and clarify any possible points of confusion or differences of opinion
- ❖ Next steps and next meeting
 - This is how you convey that this is an ongoing effort, not just a project, and provide a commitment to action prior to leaving the room. This is where you make a commitment to create some sort of value to ensure ongoing participation by the members
- ❖ Meeting adjourned



Possible Questions for Industry Needs Discovery Discussion

Make sure the business leaders know what the questions will be before they arrive. Consider segmenting your questions into a logical progression. A proposed sample is below.

Workforce Challenges - Review of Current State Information (Presentation of highlights of 2-page document sent to employers prior to meeting.)

- ❖ Is there anything that stands out to you as being incorrect in the industry summary document provided to you?
- ❖ What is missing from this document? (see guided questions below)

Hiring needs and challenges - Guided Discussion

- ❖ What do you see as key industry trends driving the short and long-term demand for workers in your region? Will these changes affect all categories of employment equally or some more or less than others?
- ❖ What workforce or economic challenges to you see as key obstacles to creating a more robust hiring environment? (Probe for regulatory constraints, lack of a qualified pipeline of employees, permanent/temporary hiring challenges)
- ❖ What do you consider to be the "new normal" with respect to your workforce? (Probe for the need for employees with different skill sets, advanced education or training, employees working remotely, or a contract basis, or part-time)
- ❖ What role do you see educational institutions playing in the delivery of occupation specific training, or industry recognized certifications or credentials? (Probe for what certifications and degrees are needed that are not included in the introductory document)

Solution Finding Questions

- ❖ What other topics / issues should be further addressed in a strategic plan for talent pipeline development for workforce and education for your industry?
- ❖ How can (this intermediary organization) forge a stronger partnership with your company and your industry, and what specific initiatives should we consider undertaking to build that partnership? (Probe for: What is your sense for the incentives that government provides related to customized training, on the job training, tax credits, and other options such as registered apprenticeships?)



WHAT HAPPENS IMMEDIATELY AFTER THE MEETING?

Follow through

You will want to send a thank you email, and commitment to action, to employers following the event. Make sure it is clear what they can expect as an outcome of the meeting. Some sample language is below.

- ❖ Again, we would like to thank you for your participation in this important effort.
- ❖ Our next step will be to create a draft set of recommendations or proposals for solutions for the workforce issues you have identified for your industry.
- ❖ This will be vetted with internal constituencies, and we may be reaching out to some of you to get your thoughts and feedback regarding our proposed solutions.
- ❖ We will look to meet with you again in 3-6 months to present to you our findings, and strategy to address the issues we discussed with you today, and to get your feedback on projects we have started as a result of your recommendations. Please feel free to follow up with us via phone or email with any additional thoughts or suggestions that may occur to you after this meeting.

