



Connecting Talent with Opportunity

HDCl SECTOR PARTNERSHIP GUIDE

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The aim of the HDCI Sector Partnership Guide is to provide communities with the tools, resources, and processes they need to build effective industry-workforce development partnerships. The guide is based on lessons learned from the first two years of HDCI and case studies from around Georgia and across the United States. The guide is designed to serve as a desk reference: Participants can refer to the various sections as they develop and implement their sector partnerships. Sector partnerships, which are required by the Workforce Innovation and Opportunity Act (WIOA), are a proven strategy to meet the workforce needs of key regional industries.

OVERVIEW OF THE HIGH DEMAND CAREER INITIATIVE

HISTORY OF THE HIGH DEMAND CAREER INITIATIVE

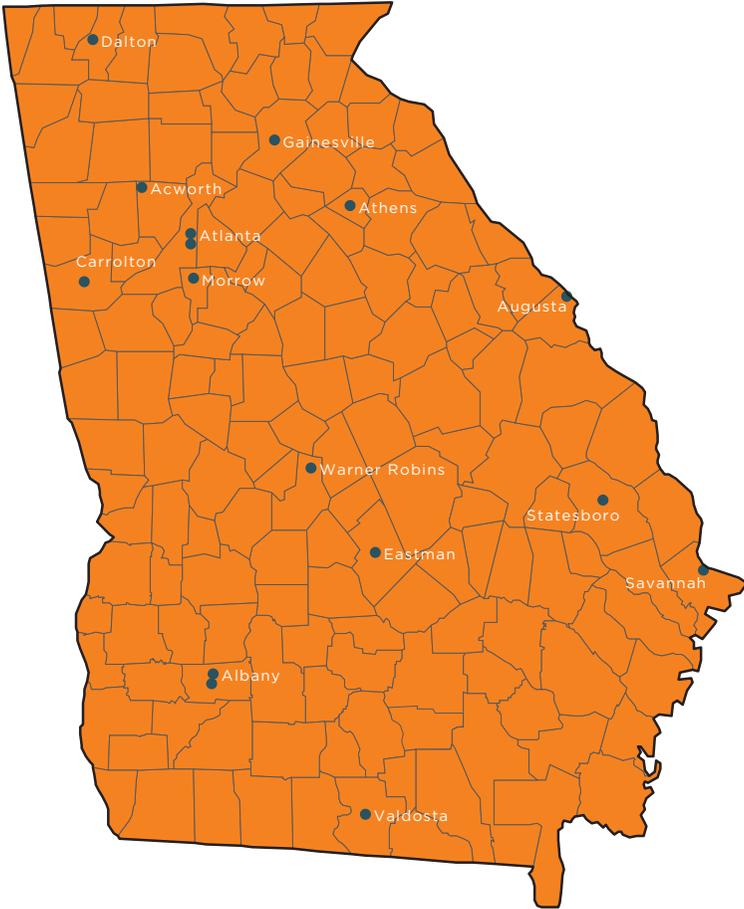
Governor Nathan Deal launched the High Demand Career Initiative (HDCI) in 2014 to hear directly from businesses about their training and workforce development needs. HDCI is a continuation of the Georgia Competitiveness Initiative, an effort that helped make Georgia the number one state in the nation for business three years in a row. At HDCI's inception, Governor Deal stated that its purpose is "to allow us to hear directly from the employers of our state about what they expect their future needs will be, and it will give our institutions of education the chance to get ahead of the curve in preparing tomorrow's workforce."



Governor Deal Speaking at an HDCI Meeting in Atlanta, Georgia

HDCI connects those responsible for the state's economic development efforts and those responsible for training Georgia's future workforce—the Technical College System of Georgia (TCSG), the Georgia Department of Economic Development (GDEcD), and the University System of Georgia (USG)—with employers to learn about current and projected challenges and needs (e.g. degrees/majors, certificates, training courses, partnerships) over the next five to 10 years. In 2014 and 2015, the HDCI process engaged more than 120 companies representing the major industries in Georgia through a series of 17 meetings held across the state. The map below shows the locations of the HDCI meetings. Participating companies identified 162 unique high-demand careers and 96 unique high-demand skills and attributes.

Figure 1. 2014 and 2015 HDCI Meeting Sites



The information obtained from the HDCI meetings was published in the Governor’s High Demand Career Initiative report, which was released in December 2014 and can be accessed at www.Georgia.org/HDCI. The report highlights themes, common trends across the state, and industry-specific needs and issues. The report serves as a key planning document for USG and TCSG institutions, workforce development boards, K-12 education (e.g., Career, Technical, and Agricultural Education; College and Career Academies), and other training partners.

OVERALL TRENDS

Several key themes and trends emerged from the statewide High Demand Career Initiative meetings.

Aging Workforce: Many employers highlighted that they have an older workforce and expect a large percentage of their employees to retire in the near future. Many companies are uncertain from where replacement talent will come.

Soft Skills: Nearly every employer engaged in the HDCI process discussed the importance of soft skills, such as communication, teamwork, problem solving, punctuality, critical thinking, and work ethic. Many employers stated that they find these skills lacking in younger employees. Employers also have increasingly found recruiting employees who can pass background screenings and drug tests difficult.

Basic Educational Skills: Employers expressed a need for job candidates with work-ready skills such as reading, mathematics, basic statistics, and writing.

STEM Exposure/Diversity in STEM: Employers in many industries expressed a need to get younger students excited about science, technology, engineering, and mathematics (STEM) at an earlier age. For many businesses, attracting more women and minorities into STEM-related jobs is a high priority. Employers indicated that there is a talent shortage in these career fields, and recruiting women and minorities would help to better fill the talent pipeline in the future.

Skilled Trades Shortage: Employers stated that they have particular difficulty finding candidates in the skilled trade jobs (e.g., manufacturing, construction, welding, film and entertainment). Many companies stated that they are forced to look out of state to fill these positions.

More Work-Based Learning Opportunities: Many employers strongly voiced the need to expand work-based learning opportunities in the state. Several employers talked about the need for additional apprenticeship, internship, co-op, and on-the-job training assistance. Employers who use internships and co-op programs find them to be valuable in identifying, assessing, and training future employees.

The report discusses industry-specific trends, skills, and occupational findings for the following key Georgia industries: agriculture and food; aerospace; automotive manufacturing; defense; film, television, and interactive entertainment; health care and life science; information technology; logistics and transportation; and manufacturing.

SUCCESS AND OUTCOMES

HDCI has shaped policy and programs at the state level, at many educational institutions, and at the local level. The information garnered from Georgia-based businesses in 2014 and 2015 influenced many actions across the state.

Expansion of the Strategic Industries Workforce Development Grant (SIWDG)

—The SIWDG provides financial assistance to HOPE Grant recipients who are pursuing training in selected high-demand fields to cover additional educational costs. As a result of the feedback received from employers through the HDCI process, the SIWDG program has been expanded to include the following additional fields: film set design, computer programming, precision manufacturing, certified engineering assistant, and industrial maintenance. Learn more about the SIWDG program at tcsgeu/freecollege.php.

Introduction of Georgia WorkSmart—In October 2015, Governor Deal launched Georgia WorkSmart. Led by GDEcD’s Workforce Division, this program is the State’s work-based learning initiative, offering companies a menu of employment training options tailored to meet the company’s specific workforce needs. Georgia WorkSmart aims to promote apprenticeships, internships, and other training partnerships to connect students and employers.

Local Adoption of the High Demand Career Initiative Process—Many local communities have made workforce development a priority in recent years. Some communities have adopted workforce development strategies that are modeled after the HDCI approach.

Announcement of Computer Programming to Satisfy Core Requirements in High School

—As a result of hearing from businesses during the HDCI process and a request from the Governor, the Georgia Board of Education amended its policy to allow computer programming courses to satisfy core requirements in the areas of math, science, and foreign language in high schools. Additionally, the Board of Regents of the USG will now accept these computer programming courses as part of their admissions process.

Launch of the Georgia Film Academy—The HDCI process identified a lack of locally trained film production employees in the state. The USG and TCSG joined forces to launch the Georgia Film Academy to support the film and television industry with meeting the industry’s workforce needs. The courses provide students with extensive hands-on experience. Students also have opportunities to network, build resumes, and learn self-marketing to prepare them for job search and help with landing entry-level positions. Learn more at georgiafilmacademy.org

REGIONAL HDCI APPROACH

During its first two years, HDCI's primary focus was to engage private sector employers by collecting information about present and future workforce needs. The data and information collected have provided Georgia workforce development leaders with a clear depiction of statewide workforce needs and have helped influence statewide policy and programming. Although the information gathered by the HDCI team in 2014 and 2015 is sufficient to describe the workforce needs of Georgia employers, it does not provide adequate details for implementing solutions at the local and regional levels.

The next step of HDCI, therefore, is to support the development of regional sector partnerships that will work to understand and act on the needs of key regional industries. These sector partnerships engage businesses and inform the educational and workforce development efforts at the regional level, both goals that HDCI has championed. These regional sector partnerships will further build an infrastructure of communication and collaboration between the public and private sectors throughout the state.

HDCI SECTOR PARTNERSHIP GOAL

Equipping local workforce development boards and their partners with the tools, training, and resources to build effective sector partnerships that meet the talent needs of key regional industries

WHY SECTOR PARTNERSHIPS?

Sector partnerships are the key strategy for moving and sustaining the goals of the High Demand Career Initiative. They are a proven approach to aligning the training and education programs in a community with the employee skills and competencies needed by employers in a given sector. Sector partnerships emphasize employer engagement, and encourage employers themselves to lead, direct, and champion the work. Another benefit of sector partnerships is that they are a key component in WIOA. A stated purpose of this legislation is “to support the alignment of workforce investment, education, and economic development systems in support of a comprehensive, accessible, and high-quality workforce development system.”¹ To meet that purpose, local workforce development boards are “to establish and develop relationships and networks with large and small employers and their intermediaries; and to develop, convene, or implement industry or sector partnerships.”²

SECTOR PARTNERSHIP BENEFITS

Sector partnerships have several benefits that help all the partners achieve their missions and goals.

Sector partnerships help meet industry needs. Sector partnerships improve the quality of the services delivered to the business community by ensuring that educational programs, training programs, on-the-job training, and other offerings match current needs, and they keep workforce development partners abreast of changing technology and practices.

Sector partnerships align educational programs. Sector strategies provide educational institutions (K-12, technical colleges, four-year institutions) the opportunity to regularly hear directly from the business community about current needs. These partnerships help improve connectivity and build a feedback loop between education and the business community.

Sector partnerships support workforce development boards. Sector strategies are a mandatory practice under WIOA. Additionally, effective sector strategies build strong links with the business community, create opportunities for increased on-the-job training, increase placements, and ensure that all practices align with current demand.

Sector partnerships build feedback loops with industry. Effective sector strategies keep workforce development and education apprised of changing workforce needs. This continuous engagement with the business community will help the workforce system anticipate and adjust its programs and services to stay ahead of industry needs.

Sector partnerships help improve outcomes for workforce development board customers. Successful sector strategies ultimately improve the services and outcomes provided to workforce development board customers by ensuring that they receive the right information, coaching, and training (either classroom or on-the-job training) that leads to jobs in high-demand careers.

¹Public Law 113-128 Section 2 (2)

²Public Law 113-128 Section 134 (c)(1)(A)(iv-v)

WHAT ARE SECTOR PARTNERSHIPS?

Sector partnerships are workforce development working groups that focus on a single industry or industry cluster, such as healthcare, logistics, advanced manufacturing, film and entertainment, or aviation. These working groups bring together key employers in the industry, workforce development entities, educational institutions (K-12, technical college, and four-year institutions), economic development professionals, chambers of commerce, and other partners (e.g., community development, social services). These working groups are solely focused on meeting the talent needs of the specific industries.

LET'S GET TECHNICAL...

WIOA Sector Partnership Definition: “Workforce collaborative, convened by or acting in partnership with a...local [workforce development] board that organizes key stakeholders in an industry cluster into a working group that focuses on the shared goals and human resources needs of the industry cluster.”³

Sector strategies are the “goals, plans of action, policies, and service delivery strategies developed and continuously re-examined by sector partnerships to meet the ongoing and changing needs of employers within that sector.”⁴

³Public Law 113-128, Section 3(26)

⁴www.mahernet.com/blog/welcome-to-wioa-easy-intro-to-sector-strategies-sector-partnerships



THE FUNCTIONS OF SECTOR PARTNERSHIPS

The role and activities of each sector partnership are uniquely tailored to the local needs identified by the needs assessment process and ongoing conversations with industry leaders. Figure 1 details some of the common activities undertaken by sector partnerships.

Figure 2. Common Sector Strategies⁵

Analyze:	Analyze the industry's current and future skills, occupation, and training needs in the local area using a needs assessment process. The analysis should include traditional and real-time labor market information and business engagement.
Develop a plan:	Develop a plan to address the action items identified through the needs assessment process.
Implement:	Implement the plan by carrying out activities such as: <ul style="list-style-type: none">• Identifying common skill standards and promoting industry-recognized credentials• Building career pathways• Creating or informing training programs, K-12 curricula, and postsecondary courses• Identifying or creating internship and experiential learning opportunities
Create and Track:	Create and track metrics related to sector goals and a common vision to foster accountability and continuous improvement.

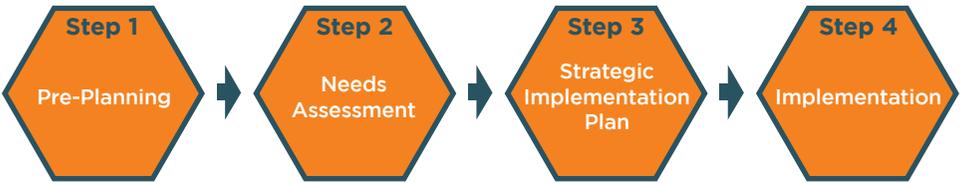
⁵Adapted from the National Skills Coalition, "Skills in the States: Sector Partnership Policy "



SECTOR PARTNERSHIP LAUNCH PROCESS

Creating an effective sector partnership requires extensive research, pre-planning, and engagement. This section details the process from initial ideas to implementation. Figure 3 shows the general process for developing sector partnerships. This is an iterative process that will require continuous feedback and evaluation as the sector partnership develops.

Figure 3. Steps to Launch a Sector Partnership



PRE-PLANNING

Step 1: Determine Industry Focus

The first step in developing a successful sector partnership is to determine which industry to focus on. This step seeks to answer questions such as:

- What industry in the region has difficulty finding talent?
- What industry can the sector partnership be effective in serving?
 - Which positions are the most difficult to fill? Are these positions that the sector partnership can realistically make progress in filling?

REVIEWING THE DATA

A review of regional labor market information and economic data on the top exporting industries and fastest growing industries will provide a short list of potential industries to consider. Consider industries that employ a significant number of people from the region, industries that have grown in recent years, and industries critical to the local economy. Use labor market information (LMI), both traditional and real-time, and business engagement.

PRE-PLANNING

1. Determine the industry focus
 - a. Analyze labor market data
 - b. Talk with industry leaders
 - c. Review documents from past projects
2. Inventory existing initiatives and programs
3. Identify project champions and a convener
4. Recruit core partners
5. Identify meeting dates, locations, and food
6. Finalize the scope of work

Traditional LMI: These data are collected by federal statistical agencies and the Georgia Department of Labor and typically have a lag between collection and release. Traditional LMI is very comprehensive and allows researchers to analyze trends over long periods of time. Traditional LMI sources include the Quarterly Census of Employment and Wages, the American Community Survey, Occupational Employment Statistics, Quarterly Workforce Indicators, Employment Projections, and the Current Population Survey.

DID YOU KNOW?

Real-Time LMI through Burning Glass can be provided by the Georgia Department of Economic Development to local workforce development boards. For information about reports and data regarding specific industries in your region, contact your local workforce development board.

Real-Time LMI: This category of data is collected and aggregated by private companies (e.g., Burning Glass, EMSI, Help Wanted Online) from online job boards (e.g., Monster, Indeed, trade associations, newspaper websites). Real-time LMI allows for a more up-to-date and detailed picture of job demands in a region than traditional LMI may provide.

Business Engagement: Validate the data by talking with leaders in the selected industry. Initial conversations will set the stage for inviting the employer to be a participant in the sector partnership. The business engagement will ensure that the needs found in the data are correct, that the hard-to-fill positions are correctly identified, and that no key issues were missed.

WHY BUSINESS ENGAGEMENT MATTERS:

In a recent project, a review of real-time and traditional LMI identified nursing as a hard-to-fill position in the study region. Health care employers in the region validated this fact through the business engagement process. However, the employers indicated that their needs were more specialized. They were specifically looking for nurses who could work in call center environments, who had the right soft skills as they were “hiring nurses for attitude and training for skill,” and who had Bachelor of Science in Nursing degrees because hospital accreditation standards have changed.

Without business engagement, the community may have invested in the wrong strategy to meet this need.

SELECT THE SECTOR

Choosing the industry for the sector partnership is not an exact science. Review all of the labor market data collected and the feedback and information garnered through the business engagement process. The LMI should help identify unmet workforce needs in the region, show which jobs are in demand, and clearly define what the need is. The business engagement process should validate and expound on what is learned from the labor data analysis. Leaders involved in the sector partnership development process also need to analyze the capacity of the region's key partners to meet this industry's needs. Consider the questions in the box below to help choose the potential industry sector.

Consider these questions as you review potential industries

- 1) Does the industry offer career pathways and economic opportunity?
- 2) How difficult is it for the industry to find the talent it needs?
- 3) How important is the industry to the region?
- 4) Is the industry willing to partner to meet its talent needs?
- 5) Is the industry projected to grow or decline over the next decade?
- 6) Are the partners in the region capable of meeting the needs of this industry or are the needs outside of the scope of educational institutions in the region (for example PhD microbiologists)?

Step 2: Inventory Existing Initiatives and Programs

After selecting an industry sector, the next step is to inventory any existing programs, partnerships, or initiatives that are already happening in the region related to that industry sector. Conduct the inventory by talking to partners in education, economic development, chambers of commerce and economic development authorities in the region, workforce development leadership, government leaders, and other regional stakeholders. They will likely be aware of related efforts in the selected industry sector. After compiling a list, research and contact the organizers of these various programs to determine their scope, function, and capacity.

Often existing efforts can be leveraged to support or become part of the sector partnership. For example, the local technical college may have a bi-monthly meeting with health care industry leaders to talk about training needs, or one of the county's economic development professionals may host a quarterly manufacturing industry roundtable to discuss human resource issues in the industry. Instead of trying to create a completely separate health care or manufacturing sector partnership, explore options to combine efforts, resources, and capacity.

It is important that the new sector partnership does not duplicate existing efforts in the region. Instead, find ways to partner with existing programs, initiatives, and partnerships.

Step 3: Identify the Project Champions and Convener

Now that the target industry has been selected, identify the project champions and a convener for the partnership. The convener is the organization or person who can bring all of the partners to the table for the sector partnership. The convener may be the workforce development board executive director, chamber president, technical college vice president, business leader, a retired industry executive, or a neutral convener. The convener varies by region and industry focus.

The role of the convener is to bring the partners to the table, foster an environment where productive dialogue can happen, and serve as the engine that keeps the partnership moving forward. The convener may be different from the organization that is lending the financial or administrative support for the sector partnership development. Appendix D includes a partnership readiness exercise that helps communities evaluate their capacity and needs in building community collaboratives.

Getting buy-in from influential members of the community is critical to establishing and sustaining a sector partnership. Champions are individuals who are respected in the community and can endorse the efforts of the convener, and who share the vision for the partnership.

The convener and champion will work with core planning partners to articulate an initial vision and purpose of the proposed sector partnership. This initial message will help to engage business and other partners. This vision and purpose will be further refined during the implementation process.

Step 4: Recruit Key Partners

The key to the success of a sector partnership is having the right partners—both industry and others—at the table. Partners will participate if they see benefits for their organization and if they share a similar vision for improving the workforce and the training programs in the region. Individuals willing to listen, collaborate, and solve problems across organizational boundaries are best suited to sector partnership work. If the right partners are not invested in the sector partnership, it will be difficult or impossible to meet the specific needs of industry.

WHO ARE THE KEY PARTNERS?

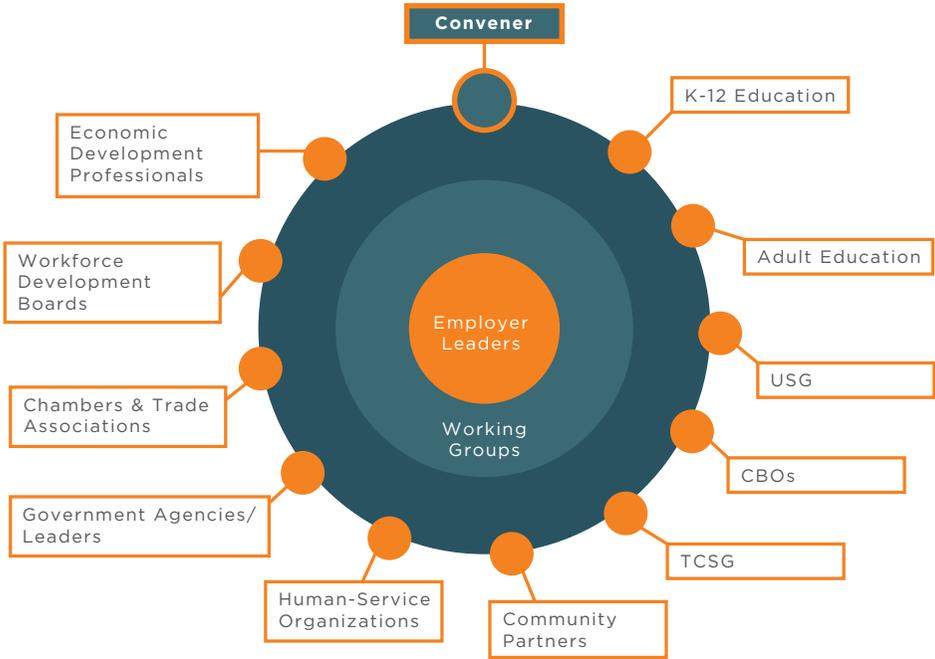
The required partners will vary depending on the industry selected and the unique qualities of the region. The convener and the team working to build the partnership should decide which partners best fit their needs. At the most basic level, an effective sector partnership group requires

representatives from industry, education, and workforce/government. Figure 4 shows some of the potential sector strategy partners. A typical sector partnership could include, but is not limited to, the following participants:

- At least five employers from the industry
- Representatives from the K-12 school system
- Representatives from postsecondary education institutions
- Workforce development/government leaders
- Community-based organizations
- Representatives from the local chambers of commerce/local economic development professionals
- Georgia Department of Economic Development existing industries representatives
- Representatives from the Georgia Department of Labor
- Representatives from the Georgia Vocational Rehabilitation Agency
- Representatives from the Department of Community Affairs
- Community partners
- Military transition assistants or other applicable staff from local military bases
- Local service providers, such as your local office managing Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF) program participants, transportation, housing, etc.
- Regional Commissions
- Other regional or local education organizations, such as Regional Educational Service Agencies
- Foundations and philanthropic partners
- Case managers or student navigators (TCSG and Department of Human Services)
- Temporary employment firms
- Potential training participants (those looking to increase their skills)
- Associations and organizations representing specific industries and businesses

The list of potential partners can grow very large. As the group becomes larger, it may be necessary to create several smaller working groups to handle different components of the strategy. Creating working groups will prevent the sector partnership from stalling and losing the interest of partners who have time constraints.

Figure 4. Potential Sector Partnership Participants



RECRUITING INDUSTRY

The convener and partnership champions need to recruit leading employers from the selected industry to actively participate in the sector partnership from the needs assessment stage through ongoing implementation. There is no “right” or minimum number of partners; it depends on the selected industry. For example, some industries such as health care are more consolidated than industries with many employers like construction or manufacturing.

Principles for engaging leading employers:

- Identify an industry champion in the region who can help advise and recruit potential members.
- Reach out to chambers of commerce or economic development authorities for assistance in identifying and recruiting members.
- Explain to the members the benefits of being involved in the sector partnership and the “what’s in it for me” factor.
- Clearly state their role and the time involved.

WHO ARE EMPLOYER LEADERS?

- They know their industry
- They are willing to share best practices
- They encourage collaboration
- They advocate with educational and training organizations
- They take the time to understand and manage their talent supply chain
- They listen to their managers and their workers

Source: National Fund for Workforce Solutions

RECRUITING NON-INDUSTRY INDUSTRY

As the convener and sector partnership development team also needs to recruit and engage non-industry partners from workforce development, government, education, and community-based organizations to participate in the collaborative; the following principles for engaging non-industry partners are helpful:

- Encourage the organization's decision makers to participate, at least initially, so that there is an understanding of the motivation and business case for the collaborative.
- Explain how involvement in the sector partnership can help achieve their goals and the "what's in it for me" factor. Clearly state the expectations and time requirements for participation in the sector partnership.

WHAT'S IN IT FOR ME FACTOR

When you are working to recruit and engage core partners, it is important to be mindful of the "what's in it for me" factor. Partners will engage if they can clearly identify the benefit. For example, businesses are more likely to engage if they are convinced that the sector partnership can help meet their pressing talent needs. Organizations will opt to engage fully in the sector partnership if they can meet their goals and performance metrics via the sector partnership. Finding the intersection of shared interest or agreement on a common goal or vision is critical to building a strong and sustainable partnership.

Step 5: Identify Meeting Dates, Locations, and Food

With the industry selected and the partners identified, the next step is to schedule partnership meetings. The first meeting should be scheduled at least four weeks in advance. Consider which partners are absolutely critical and schedule the dates around availability. With enough notice, the partners should all be able to arrange to attend. Identify all future meeting dates and make sure all the partners have these dates and times blocked out on their calendars. When possible, build each meeting around breakfast or lunch, as this can help make it easier for partners to attend.

When choosing meeting locations, consider venues that are convenient and have adequate parking. Holding meetings at an employer's offices is a good way to introduce the partners to the industry.

Step 6: Finalize the Scope of Work

The Scope of Work should be constructed and agreed upon by the champion, convener, and all key partners prior to launching the partnership. As this will frame the meeting and communicate the importance of the extended group of participants, it should be sent out with the "save the date" notice.

Step 7: Identify a Facilitator

When working with collaborative groups, it is helpful to have a neutral third-party facilitate the meeting. The facilitator should be someone who does not have any vested interest in the outcomes of the project and is removed from the day-to-day relationships in the region. A facilitator will help develop a plan for the meetings and make sure the information that needs to be shared and decisions that need to be made are done in an orderly and deliberate fashion. A neutral facilitator can also help the group work through any barriers or issues that need to be addressed for the group to be successful.



Facilitator helping to guide the conversation during a High Demand Career Initiative meeting

NEEDS ASSESSMENT

With the industry sector selected, a convener and champions identified, and all the partners engaged, the next step is to devise an organized way to listen to employers in the industry and understand their needs. This is the core of the workforce planning process and involves identifying the industry's in-demand jobs, skills, credentials, and competencies. The needs assessment process gives employers the opportunity to explain the specific knowledge, skills, and competencies a person needs to be successful in a given industry or career track. Employers also can provide insights into how the industry is changing and how those trends will affect the future workforce.

NEEDS ASSESSMENT

1. Invite Partners
 - a. Prepare businesses to present
 - b. Prepare business representatives to lead
2. Hold needs assessment meeting
 - a. Listen
 - b. Identify themes
 - c. Identify opportunities
3. Document the meeting

For example, in a recent information technology (IT) sector partnership meeting, representatives from a major e-commerce company shared about the transformation of software development for their business. The traditional method is to develop specifications, develop software, test software, and then deploy the software. The new process uses teams for rapid development and deployment. This company is looking for team members with project management, business analysis, programming, and testing skills who work together through the full lifecycle of development. This insight will impact the content and delivery methods for the education and training curricula related to this sector.

Step 1: Invite Partners and Prepare Them to Present

Identify the employers in the target industry who can represent and speak to the workforce needs of the sector. The number of employers will vary by the region and the industry, but include a minimum of five employers.

Once the business has confirmed it can attend the needs assessment meeting, the facilitator or project manager should coach the speakers on the specific content to be presented related to skills and competencies needed now and in the future. Appendix C contains a company preparation guide. The best company representatives tend to be the hiring manager, plant supervisor, or human resources manager, all of whom are knowledgeable about the quality of the employees being hired, openings, and any skills gaps in their industry. Ideally, invite both an operations manager (e.g., plant manager) and a human resources expert to speak. Limit speakers to no more than 10 minutes each. If the

business has a PowerPoint presentation, limit the presentation to no more than five slides. Typically a presentation covers the following:

- a. Company overview
- b. Current employment/talent needs, emphasizing skill and competency gaps
- c. Future talent needs; where the industry is going and its impact on the workforce
- d. Education and training needs

TIPS FOR SCHEDULING SPEAKERS FROM INDUSTRY EMPLOYERS

- 1) Schedule at least four weeks in advance.**
- 2) Consider providing either breakfast or lunch.**
- 3) Clearly communicate the purpose of the individual's involvement and the benefits to the business.**
- 4) Ask your economic development professionals and chambers of commerce to invite partners to participate. Often, partners have pre-existing relationships with the employer leaders.**
- 5) Be respectful of how a leader's time is used in the planning and early implementation process. When employers are participating in sector partnership activities, it takes time away from their day jobs.**

Step 2: Hold the Needs Assessment Meeting

Appendix E provides a sample agenda for an effective needs assessment meeting. Below are some guidelines you may want to follow when planning these meetings:

- a. Ensure all the key partners are in the room.
- b. Allow only the employers to present and discuss their workforce needs. See the suggested room set-up in Appendix G.
- c. Training and education providers and other stakeholders may ask clarifying questions of the employers. This is not the time to defend current programs or explain what is being done or can be done. Instead, this is a time to listen to the needs of the employers. A sample feedback sheet for training and education providers can be found in Appendix I.
- d. The meeting facilitator can moderate the meeting, ensuring time allotments are observed and that one person speaks at a time. The facilitator keeps the meeting on track, reminds the partners to only ask questions, helps guide the discussion, and helps the group identify common themes at the conclusion of the meeting.

⁶National Skills Coalition, Sector Partnership Policy Toolkit, page 8, October 2015

There is no one-size-fits-all approach for conducting needs assessments. The format and approach of the needs assessment will vary by industry, region, and the partners involved. Other potential needs assessment approaches include:

- One-on-one interviews
- Employer surveys
- Sending data and detailed questions before the meeting

Step 3: Document the Meeting

Assign a project team member to take notes at each meeting. The notes should be distributed shortly after the meeting to all participating stakeholders, ensuring that participants can stay involved even if a meeting is missed.

Make sure the group takes time to identify common themes and needs in the industry, and the notes should record this critical information. Identify the skill needs that can be met at each level of the education system. Consider what high schools, technical colleges, universities, and training providers can each do to address each employer's stated needs.

Listening to employers is an essential part of the needs assessment process. The qualitative data from employers provides context to the quantitative workforce data. The needs assessment process should validate and expand upon the quantitative labor market information.



Engaging discussion during a 2014 HDCI Employer Round-table

DEVELOP A STRATEGIC IMPLEMENTATION PLAN

Now that your collaborative understands the industry's workforce development needs and challenges, the next step is developing an implementation plan to address the employer needs and skill gaps identified in the needs assessment. The implementation plan must be realistic and clear in order to move the work from discussion to action. It should explain what will be done, who will do it, and when tasks will be completed.

Step 1: Create a Collective Vision

To begin, the partners must agree on a common vision and purpose for the sector partnership. An initial vision and purpose of the sector partnership should have been developed and communicated during the pre-planning phase. As the implementation plan is developed, the group should reconfirm its vision and purpose as new members may have joined the group during the planning process and needs assessment. Once you have a common vision and all partners are clear about the purpose of the sector partnership, it is time to develop a set of action items or projects, prioritize the projects, and determine who will lead each project.

Step 2: What Will Be Done?

As part of the needs assessment, the group identified some common themes and developed ideas for addressing those needs. With the help of a facilitator, the partnership now needs to finalize a list of potential projects and prioritize those projects. Some projects or tasks can be done immediately. Early successes are critical to building credibility and momentum for future projects. Organize the projects into two categories: short term and long term. Short-term projects are those that can be accomplished in six months or less, and long-term projects will take more than six months. The partners should vote on the most important short-term and long-term projects to prioritize where efforts will be made first. (Consider using dot voting on flipchart paper, ballots, hand voting, or online surveys.) Participants should also consider what projects will have the biggest potential impacts for the selected sector.

The prioritized project list will be included in the implementation plan and help guide investment and scheduling decisions. The implementation plan lists the projects that the sector partnership will undertake and serves

STRATEGIC IMPLEMENTATION PLAN

1. Create a Collective Vision
2. What will be done?
 - a. Develop list of opportunities
 - b. Prioritize
 - c. Finalize action items
3. Who will do the work
 - a. Assign a partner to each action item
4. Develop a project timeline
5. Identify measures of success

as both a roadmap and an accountability document. The partnership should discuss any potential obstacles or risks that may limit its ability to complete the projects. The plan should document steps the group will take to mitigate the potential risks.

Some projects may require detailed step-by-step to-do lists, whereas others can be left more open-ended. Open-ended project plans are more flexible, allowing for modifications when problems arise. Be sure to keep projects focused and simple enough to be accomplished.

Step 3: Who Does the Work?

Identify a person to lead each short-term and long-term project listed in the implementation plan. The project lead will identify members of the sector partnership and other stakeholders who have the expertise needed to be part of the project team and complete the project. The project lead is the coordinator, the facilitator, and convener of everyone else involved on the short-term or long-term project. It does not need to be a person of particular authority or influence, but someone who has an interest in addressing the workforce need or skill gap.

Additionally, the sector partnership needs to identify a person or organization who can provide overall partnership management support during the implementation phase. Tasks will include note taking, agenda development, meeting management, calendar coordination, and helping the group stay focused on the implementation plan. This support could come from the workforce development board staff, education partners, chambers, or any other partner.

FUNDING

The sector partnership implementation plan coordinates and aligns the available resources of partnership members. After identifying the resources needed to carry out the projects, it is possible that staff time and a willingness to leverage existing training and education programs may be all that is needed to deliver results. If funding is required to support and implement the goals and objectives of the sector partnerships, then a funding plan will need to be developed by the stakeholders. Common funding sources may include workforce development boards, federal or state grant funding, the chamber of commerce/economic development organization, educational institutions, businesses, and philanthropic organizations.

Step 4: Develop Project Timeline

The plan should include a detailed timeline by month or quarter for when each project will start and an estimated date for completion. Binding projects to timelines gives them urgency, increases accountability, and allows the sector partnership to sequence all of its projects.

Step 5: Identify Measures of Success

Vince Lombardi once said, “If you are not keeping score, you are only practicing.” A sector partnership exists to help close the skills gap in the workforce and meet the talent needs of the industry. The measures the partnership uses to gauge success should reflect this purpose through data on employer, education provider, job seeker, and student progress against the goals of the partnership. Once goals are set and measures identified, collect baseline data for each measure and then collect and report the data every six to 12 months depending on the measure. The measures will allow for continuous evaluation and improvement during the implementation phase.

Measures could include a mix of WIOA-related metrics that may be more closely connected to industry-partner needs or those of the education and training partners. WIOA outlines six primary indicators of performance in adult programs:

- Percentage of participants in unsubsidized employment during the second quarter after program exit
- Percentage of participants in unsubsidized employment during the fourth quarter after program exit
- Median earnings of participants who are in unsubsidized employment during the second quarter after program exit
- Percentage of participants who obtained a recognized postsecondary credential or secondary school diploma, or its recognized equivalent, within one year after program exit
- Percentage of participants who, after a program year, are in an education or training program that leads to a recognized postsecondary credential or employment, or who are achieving measurable skill gains
- Effectiveness in serving employers⁶

Measures not specified by WIOA will depend on the goals of the sector partnership. The following are a few examples:

- If the goal of the partnership is to reduce the time it takes an employer to fill a high-demand job, it might measure the number of days it takes to fill such positions.
- Many sector partnerships identify the need for more internship and apprenticeship opportunities. A measure could be to track the number of internships employers filled each semester or year.
- If the goal is for employers in the sector to source more talent locally, a measure might be to track the number of jobs filled by residents in the participating counties.
- Some sector partnerships may choose to develop more programs in the high school and middle school grades. A measure that tracks

Career, Technical, and Agricultural Education (CTAE) career pathway completers with industry-recognized credentials could be an appropriate measure.

- Sector partnership participant measures are also important such as stakeholder and employer satisfaction.

With the strategic implementation plan in place, the partnership is ready to move to implementation.

IMPLEMENTATION

Step 1: Work the Plan

During the first meetings of the implementation phase, members of the partnership should be assigned specific tasks toward accomplishing the deliverables outlined for the first quarter of the implementation plan. Be sure to establish how the group members will communicate with each other and share documents.

The meeting location is also an important consideration. Meeting on-site at an employer's location can be a reminder to the whole group that they are trying to meet the industry's needs. Also consider holding meetings at the locations of each of the partners over the course of the project to foster inclusiveness.

Progress and early wins need to be regularly documented and celebrated to gauge success during the implementation phase of the project. Some partners will come to one or two meetings, but if the industry partners do not feel that their needs will be met through the plan outlined, the decision makers will delegate the project to someone else or, potentially, stop the organization's involvement completely.

IMPLEMENTATION

1. **Work the plan**
 - a. **Industry focused and led**
 - b. **Get some early wins and build on success**
 - c. **Be flexible**
 - d. **Work toward sustainability**
2. **Evaluate progress against measures**
3. **Celebrate success**

TWO ESSENTIAL ROLES FOR SUCCESSFUL IMPLEMENTATION ARE

1. **A leader who sets the vision, keeps the group on task, and celebrates success**
2. **Team members who are responsible for documenting the meeting, tracking the assigned tasks, and coordinating meeting logistics**

AS THE PARTNERSHIP MOVES FORWARD IN MEETING AND ACCOMPLISHING THE TASKS OUTLINED IN THE PLAN, KEEP THE FOLLOWING IN MIND:

1. **Keep it simple.** Focus on no more than three priorities at a time.
2. **Respect participants' time.** Business partners need to be at work to focus on their day jobs. When possible limit meetings to two hours or less.
3. **Remember that everyone is a volunteer.** Be grateful for everyone's contributions, both big and small.
4. **Keep up the momentum by accomplishing something each meeting.** Keep notes, document action items, identify who is responsible for each item, and establish a timeline. Share the notes after each meeting with all participants.
5. **Schedule sector partnership meetings at regular intervals.**
6. **Be flexible.** Adjust the plan and priorities as needed.
7. **Industry led.** Make sure the sector partnership is led by employer leaders.
8. **Assess the group's progress every six months and adjust the plan and project deadlines accordingly.**

SECTOR PARTNERSHIPS THAT WORK AND DO NOT WORK

WHAT WORKS

Diverse set of companies in industry

Industry leadership

All key partners at the table (industry, education, and workforce development)

Proactive focus

Focused on a single industry (e.g., advanced manufacturing)

Guided by a strategic plan

WHAT DOES NOT WORK

Single company

Workforce or education leadership

Workforce development board only

Reactive focus

Broadly focused (e.g., advanced industries)

Personality driven

Step 2: Evaluate Progress Against the Measures

Evaluate the sector partnership based on the projects and timelines outlined in the implementation plan and the progress on the measures. A process evaluation considers whether the partnership meets its intended project milestones and deliverables. An outcome evaluation uses the data collected related to the partnership's goals to evaluate its impact. Using the data collected monthly, quarterly, semi-annually, or annually, the partnership can see if gains are being made against the base data collected at the start of the project. If the trends are improving and progress is being achieved, that is success.

Step 3: Celebrate Success

Sharing the partnership's success builds members' pride and confidence. The public and community leaders are more likely to lend their support to the partnership's efforts when they see things getting done. The partnership can leverage its champions to get the word out to employers, educators, parents, and elected officials about the collaborative's accomplishments.



Governor Deal speaking with HDCI Partners during a 2015 HDCI meeting

CONCLUSION

This guide is intended to be a resource for establishing sector partnerships. As illustrated by the case studies in the appendix and lessons learned from across the country, there are several important steps to take when initiating and sustaining a sector partnership as part of a workforce development strategy.

First, there must be a champion and a respected convener to get the project started. The Cobb Chamber of Commerce president filled this role in the case study in Appendix J. In other locations, it may be a local technical college executive, a university leader, the local workforce development board chairperson, the Regional Commission executive director, or some other leader who serves as the convener and champion.

Second, a structured approach to assess the talent needs of the employers must be conducted. A neutral facilitator helps the group stay on task and focused on a common goal. A good needs assessment involves listening to employers and analyzing labor market data.

Third, food, convenient scheduling, and outcomes help. People are more likely to come to a meeting if it is not longer than two hours and food is served. Business leaders will participate in meetings where important decisions are being made and where there is a return on the time invested in attending.

Fourth, having a staff person dedicated to the project is essential for success. The staff member is responsible for managing the logistics, communication, relationships, and documentation.

Fifth, too often the different partners do not understand the constraints and incentives of the other partners at the table. Educators are paid to teach and be in the classroom. Business leaders are producing and selling goods and services. Developing a workforce plan with business and education leaders at the same table provides a unique forum for conversations to occur and connections to be made.

Sixth, the historical goal for educators is to graduate students. Workforce development planning places new emphasis on graduating students who are college or career ready.

Finally, the process must be employer led. Ultimately, the employer needs employees with the right skills and competencies. A sustained and routine dialogue between business and education providers helps to close the gap between needed and available skills. Sector partnerships are an effective way to engage all the partners in the workforce system to address the needs of industry.

APPENDIX

Appendix A	Sector Partnership Launch Process
Appendix B	Lessons Learned from Collaborative Community Engagement
Appendix C	How to Prepare Companies for a Needs Assessment Meeting
Appendix D (Available Online).....	Innovation Crescent Case Study
Appendix E (Available Online)	Partnership Readiness Exercise
Appendix F (Available Online)	Needs Assessment Meeting Agenda Example
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Appendix K (Available Online).....	Cobb Workforce Partnership Case Study
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*Appendixes provided online can be accessed at [Georgia.org/SectorPartnershipGuide](https://www.Georgia.org/SectorPartnershipGuide)

Appendix A. Sector Partnership Launch Process

PRE-PLANNING

- 1. Determine the industry focus**
 - a. Analyze labor market data**
 - b. Talk with industry leaders**
 - c. Review documents from past projects**
- 2. Inventory existing initiatives and programs**
- 3. Identify project champions and a convener**
- 4. Recruit core partners**
- 5. Identify meeting dates, locations, and food**
- 6. Finalize the scope of work**
- 7. Identify a facilitator**

NEEDS ASSESSMENT

- 1. Invite Partners**
 - a. Prepare businesses to present**
 - b. Prepare business representative to lead**
- 2. Hold needs assessment meeting**
 - a. Listen**
 - b. Identify themes**
 - c. Identify opportunities**
- 3. Document the meeting**

STRATEGIC PLAN

- 1. Create a collective vision**
- 2. What will be done?**
 - a. Develop list of opportunities**
 - b. Prioritize**
 - c. Finalize action items**
- 3. Who will do the work?**
 - a. Assign partner to each action item**
- 4. Develop project timeline**
- 5. Identify measures of success**

IMPLEMENTATION

- 1. Work the plan**
 - a. Industry focused and led**
 - b. Get some early wins and build on success**
 - c. Be flexible**
 - d. Work toward sustainability**
- 2. Evaluate progress against measures**
- 3. Celebrate success**

Appendix B. Lessons Learned from Collaborative Community Engagement

At the heart of the sector partnership is community engagement. The Workforce Innovation and Opportunity Act (WIOA) aligns workforce development programs with economic development priorities, industry workforce needs, and education and training programs in the state and its regions. Community collaboratives are not new in Georgia. For example, the Georgia Family Connection Partnership has been convening local partners that work with at-risk children and families in every county for 25 years.

Similarly, the University of Georgia established the Archway Partnership to form a collaborative that helps community partners work in unison to address specific issues. Members of the Archway Partnership's community collaborative are similar to those of a sector partnership, including economic, social, political, and educational leaders in the community. Some of the lessons learned from the UGA Archway Partnership and other community collaborations can be helpful in making a successful and sustainable industry sector partnership.

OBSERVATION #1

Success requires cooperation and collaboration across diverse groups.

Ensure the sector partnership has representation of the community and the specific industry sector. WIOA envisions the local workforce development board being the convener and facilitating the sector partnership to align industry, education, and economic development interests in a community. Each community is unique. For example, in one community the leaders of faith-based organizations and groups were an influential voice; to be successful, their voices needed to be heard. In another community, the convener recognized a growing group of young African American entrepreneurs in the community. To ensure that this group was represented, the convener held a series of focus groups with these young professionals to gather their input.

OBSERVATION #2

The assessment (and reassessment) of community needs and opportunities is critical.

An initial needs assessment is conducted at the beginning of a project to identify the workforce needs of a particular industry. To keep the work plan current and relevant, the needs assessment should be formally updated every two to three years. As the sector partnership matures, a strengths, weaknesses, opportunities, and threats (SWOT) analysis should be conducted in addition to assessing the talent needs and skills gaps of employers in the sector.

- **Strengths:** Which primary goals did we accomplish?
- **Weaknesses:** Which goals were not accomplished to the degree hoped for?

- **Opportunities:** What are the current challenges? How are the challenges different from when the sector partnership was first formed?
- **Threats:** What is preventing the partnership from accomplishing its goals? How can these be addressed strategically?

Sector partnership meetings are a key method for obtaining regular feedback and input from employers. Additionally, workforce development board members, economic development professionals, and chamber leaders can provide input about progress and performance.

OBSERVATION #3

Sustained community engagement requires persistence and planning.

Dedicated staff helps the partnership keep its eye on the goal and deliver results. In the case of the Family Connection Partnership, the model has been sustained because one staff position is funded in each county to serve as the convener and project manager. The Archway Partnership is similar. A UGA faculty member is embedded in the community to help facilitate partnership meetings and manage the community's work plan. Staff can help coordinate and document meetings and follow up on assignments. Identify what organization can provide long-term staff support.

OBSERVATION #4

Successful teams have engaged team members.

Engagement comes from seeing success and feeling that each partner organization is receiving something it would not otherwise have without the partnership.

Tips for Engaging Members:

- **Diversity:** Ensure diversity of team members and stakeholders.
- **Commitment:** Engage members who are committed to improving the workforce supply chain.
- **Size:** At least five employers should be part of the sector partnership. Sector partnerships can be many different sizes. As the number of participants grows, utilize committees and issue work groups to accomplish tasks. For implementation projects, limit project teams to around eight people.
- **Expertise:** Look for members with the skills and knowledge needed to address the diversity of issues, not just figureheads.
- **Contribution:** Make sure team members know why they are selected and how they can contribute.
- **Structure:** Establish routines, set agendas, and use a convener or facilitator to manage expectations.
- **Decision-making:** Have a defined protocol for decision-making. (How do we know we have agreement?)
- **Tenure:** Allow even great members to cycle off if they are fatigued.

OBSERVATION #5

Sustained groups successfully use work plans and issue work groups.

Inherent in the sector partnership plan is the use of project plans and work groups. Progress is made as people focus on specific tasks or deliverables.

- Have a clear mission and specific goals.
- Include team members who can contribute to the work plan.
- Assign responsibilities and hold people accountable.
- Meet routinely and have defined agendas that are specific to the work plan.
- Engage the project team members; do not just give reports.
- Monitor progress and evaluate objectively.
- Learn from failure.
- Celebrate and promote accomplishment!

OBSERVATION #6

Issue work groups need champions.

Work groups need champions who...

- Are committed
- Can clearly define goals
- Demonstrate good leadership skills
- Can identify and overcome obstacles
- Appropriately recognize team efforts
- Are willing to do the required work

OBSERVATION #7

Sustained teams celebrate their accomplishments!

As the partnership meets a milestone or finishes a priority task, take time to recognize the people who did the work. How work is celebrated depends upon the level of accomplishment. Celebration for small successes can be done within the sector partnership. Other accomplishments might be recognized over social media, on partners' websites, in board meetings, or through local media.

OBSERVATION #8

Success requires hard work and sustained, effective leadership...that may come from the unexpected.

The sector partnership will likely encounter structural or resource barriers that may slow or halt its work. Consider all alternatives to the problems you face. There may be a solution the group has not considered if looked at through a different lens or from the perspective of an outsider. Often involving a civic-minded person who is not part of the workforce system will bring fresh perspectives. Another way to get perspective is to keep the end user or customer in mind when solving problems. Gathering regular customer input will help keep the team focused.

Appendix C. How to Prepare Companies for a Needs Assessment Meeting

**By Jamie Jordan, High Demand Career Initiative Program Manager
Georgia Department of Economic Development, Workforce Division**



2015 High Demand Career Initiative meeting at Clayton State University

Employer feedback is essential to developing an effective strategy for the sector partnership. Hosting feedback sessions with a group of employers or a private meeting with a single company are effective methods of collecting employer feedback. There are pros and cons to each format. One of the biggest benefits of a group session is that the employers can build off of each other and fill in the gaps that can be missed individually. The potential drawback to a group meeting is that some employers are not comfortable discussing their challenges in front of their competitors. In that situation, it may be best to schedule individual meetings with employer partners.

Regardless of which format is chosen, meetings should include representatives from each of your partner agencies or organizations. This will ensure that everyone involved in your sector partnership is fully informed about the needs of the employers in the target sector. This is beneficial when developing a comprehensive strategy to address the skills gaps in the target sector.

For these employer feedback sessions to be effective, provide adequate information prior to the meeting to allow the employer representatives to be fully prepared. This will likely require an in-depth phone conversation discussing the specific details of the meeting, including the attendees, format, and expectations (be clear about the information

that is being requested in their feedback). For example, specific occupations anticipated to have the most growth; the occupations that are the hardest to fill; the specific degrees, certificates, or skills that are required for each of those occupations; the regional challenges that make filling those positions difficult for the firm; any suggestions for solutions; and any other specific relevant information.

Providing very clear instructions prior to the meeting will help prevent the company from spending time and energy discussing topics that are not helpful to your efforts. Often, when employer representatives learn that the audience at a meeting will include individuals from different organizations in the community or region, the employer tends to spend a large portion of their presentation discussing the background of the company, their business strategy, the civic and philanthropic involvement of the company, and so forth. The workforce portion of the presentation/discussion is often abbreviated at the end. Therefore, letting them know that 90%+ of the time should focus on discussing the specific details of the company's workforce challenges will help provide the appropriate information.

During these meetings, most companies like to use a PowerPoint presentation to accompany their feedback. Therefore, it is also helpful to share an example presentation from another company that provides the information sought. Sending a presentation that includes lists of specific occupations, degrees, certifications, skills, challenges, and solutions will encourage them to duplicate that format. As a result, receipt of the information needed and a written account of the information will occur.

Appendix D. Innovation Crescent Case Study

Appendix E. Partnership Readiness Exercise

Appendix F. Needs Assessment Meeting Agenda Example

Appendix G. Needs Assessment Meeting Discussion Guide Example

Appendix H. Needs Assessment Room Set-Up Example

Appendix I. Priority-Setting Meeting Agenda Example

Appendix J. Needs Assessment Meeting Worksheet Sample

Appendix K. Case Study on the Cobb Workforce Partnership

Appendix L. Industry Roundtable Develops Workforce Training Solution Case Study

Appendix M. Partnership in Middle Georgia: National Emergency Grant Case Study

Appendix N. Workforce and Education Partnerships in West Georgia Case Study

Appendix O. List of Statewide Workforce and Education Programs

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