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Business Services Guidance – November 2017
Effective Date – December 1, 2017
Rescinds and Replaces NCWIB Notice 1-10 – March 2016

I. Purpose

To provide a revised policy rescinding and replacing the North Central Workforce Development Board's NCWIB Notice 1-10 regarding Business Services. Included in this policy is background information, labor market information tools, technical assistance / tools and board required Business Service Team composition, expectations, team goals, objectives and team responsibilities.

II. Background

WIOA Places a strong emphasis on enhancing communication, coordination, and collaboration among employers, economic development entities, and service providers to ensure that workforce development activities meet the needs of employers and support economic growth in the region.

Workforce Solutions/North Central WDB strongly supports the emphasis on employers as a primary customer and believes workforce development begins with knowing the needs of local employers. This policy outlines a strategy of collaboration between our partners and the board to ultimately fulfill a critical role in listening to employer needs, effectively responding and ultimately delivering high quality talent and services.

The Workforce Innovation and Opportunity Act (WIOA) focuses on six main areas highlighting the importance of alignment of services and employer engagement:

1. Increase access to and opportunities for employment, education, training, and support services for individuals, particularly those with barriers to employment.
2. Support the alignment of workforce investment, education, and economic development systems in support of a comprehensive, accessible, and high-quality workforce development system.
3. Improve the quality and labor market relevance of workforce investment, education and economic development efforts.
4. Promote improvement in the structure and delivery of services.
5. Increase the prosperity of workers and employers.

6. Provide workforce development activities that increase employment, retention, and earnings of participants and that increase post-secondary credential attainment and as a result, improve the quality of the workforce, reduce welfare dependency, increases economic self-sufficiency, meets skills requirement of employers, and enhances productivity and competitiveness of the nation.

The Commonwealth, within their Combined Plan, reinforces the intent of WIOA with five broad goals for the commonwealth's workforce development system:

- Establish career pathways as the primary model for skill, credential and degree attainment and provide all Pennsylvanians, with an emphasis on Pennsylvanians with barriers to employment, an opportunity to obtain a job that pays.
- Expand public-private investment in the state's pipeline of workers and in incumbent workers for targeted industry sectors from entry-level skills to middle skills through Industry Partnerships, WEDnetPA, and other innovative strategies.
- Increase opportunities for all youth to participate in work based learning through summer employment, pre-apprenticeship, apprenticeship, internships and other similar experiences.
- Engage employers through multi-employer workforce partnerships to improve the connection and responsiveness of workforce programs to the demand side of the labor market, increase public-private investment in critical skills, and support the spread of employer practices that create jobs that pay.
- Strengthen data sharing across state agencies and workforce development partners to better understand education and employment outcomes and rely more effectively on data to improve and target our efforts.

Workforce Solutions for North Central PA / North Central Workforce Development Board, building on the WIOA Legislation and Pennsylvania's Combined State Plan, developed the following vision, mission, and goals. All of which become the building block to this Business Services Policy.

Serving the Counties of Cameron, Clearfield, Elk, Jefferson, McKean and Potter

Workforce Solutions for North Central Pennsylvania is your premier connector to workforce services, activities, and potential funding in North Central Pennsylvania. Also serving as the **North Central Workforce Development Board** we have specific responsibilities to our partners, job seekers, and employers throughout our 6-county region regarding workforce services.

VISION STATEMENT

The North Central Workforce Development Board will be a strategic workforce development leader focused on promoting economic prosperity and self-sufficiency of individuals by creating a workforce that is competitive in the global marketplace.

MISSION STATEMENT

The North Central Workforce Development Board serves as the premier facilitator of an innovative workforce development system that meets the changing human capital needs of our employers and provides resources for our job seekers that maximizes their career potential and focuses on the customers' needs.

GOALS

Enhance public-private partnerships through better connectivity and communication in order to increase investment in our workforce system leading to greater economic vitality for our region.

- Engage in Sector Strategies of our growth industries identifying current skill gaps of both the incumbent and entry-level worker that will result in skill upgrades through customized training and partnerships.
- Design innovative workforce development strategies to reach young adults and keep them engaged through the identification of best practices and development of new programs utilizing the Customer Centered Design Method.
- Identify Career Pathways in major industry sectors to enhance career counselling that will result in training opportunities for our customers through skill, credential and degree attainment.
- Ensure that our customers, both employers and job seekers, remain in the center of our design of all services and encourage our partners to do the same.

III. Business Services

The expectation is for solid employer relationships built with frequent and meaningful engagement that encourages employers' active participation in and use of the workforce system. The team should act in a "sales" role and be able to perform the following functions:

- ✓ Ability to listen and understand needs rather than immediately sell
- ✓ Solutions-oriented approach to selling
- ✓ Ability to adapt and demonstrate value to unique contacts
- ✓ Provide innovative solutions for customers
- ✓ Utilize questioning skills in a friendly, professional appropriate way
- ✓ Ability to gain deep understanding of core business processes and needs
- ✓ Ability to prepare for and conduct appropriate pre and post contacts

IV. Team Composition

Business Service Team Core members are the PA CareerLink® Partners as well as additional partners in the region that also serve employers as appropriate. Due to the confidential nature of information shared at the Business Team meetings the board recognizes that it may not be appropriate to include additional partners from the community such as Chambers of Commerce, County Economic Development staff, Northwest Industrial Resource Center staff and the Clarion University Small Business Development Centers (SBDC) and others as identified by each Business Service Team. It is therefore anticipated that the BSTs partner with these and other community agencies as appropriate in their respective county, region, etc.

V. Business Service Team Expectations

In order to be most valuable to our employers and avoid business fatigue from multiple contacts as well as ensuring coordination of services, team members are expected to make minimal employer visits to evaluate employer needs and explain available PA CareerLink® services. Teams are expected to meet at least quarterly with an agenda and conference call options. Meetings are to be documented by brief

meeting notes and should be sent to Susie Snelick or Pam Streich following each meeting. The Business Service Team is not an official board therefore there is no official business to be voted on.

Business Service Team Meeting Agendas shall include but not be limited to; needs of employers identified by each partner, potential coordination of services, Next Generation Sector Partnership Activities, High Priority Occupations, new employers, lay-offs, etc. Teams should review job order processes, i.e. listing/writing job orders, reviewing team member responsibilities, etc. Discussion of local/regional labor market and/or other employer data/analysis.

Employer Visits: Employers should be profiled prior to each visit to determine basic information. Employer information to obtain includes but is not limited to; hiring needs, training needs, expansion, downsizing, etc. The PA CareerLink® services explained and use of the CWDS system should be explained and assistance and / or training on CWDS should be provided.

VI. Business Service Team Goals and Objectives

Workforce Solutions expects teams to recruit at least 10 employers to enroll into CWDS per quarter. Employers should be from one the 11 PA Industry Clusters with emphasis on the High Priority Occupations for the North Central Workforce Development Area and the Top Industry Clusters® (Manufacturing and Healthcare).

Emphasis should be on building positive relationships with the employers in our region in order to encourage the use of the services available at the PA CareerLink®.

VII. Business Service Team Responsibilities:

Team responsibilities include but are not limited to:

- Business Needs Assessment and referral to other agencies, as appropriate
- Develop relationships with local business and agencies to promote the PA CareerLink® and host various events that will be of interest to businesses. For example, job fairs, mass recruitment, rapid response activities, etc.
- Labor Market Information
- Explanation of PA CareerLink® services and partner services
- Assist the Workforce Solutions with data entry for Next Generation Sector Partnerships and other sector strategies as implemented by the board
- When a referral is made from a partnering agency such as PREP or a local economic development agency (i.e. through the ENGAGE program) the BST should follow up with the company based on the needs identified.
- Enter a CWDS case note with each employer interaction.

VIII. Technical Assistance

Workforce Solutions' staff have access to several tools and resources that can assist you in meeting the goals, objectives and responsibilities of the Business Service Teams. The following are examples of resources the staff have available upon request:

1. Workforce Solutions' Employer Database as provided to board staff by the Center for Workforce Information and Analysis (CWIA).

2. JOBSeQ via Chmura Economics and Analytics online tool - Upon request board staff can supply you with detailed labor market information as listed on Attachment1 to this Notice and contains a list of the data that will be available for your use.

3. The WDB, through our continuous improvement efforts, implemented a Business Education and Training Assessment Process in 2005. The process formalized our Business Services provided by the Title I Workforce Development Staff. While we are no longer requiring the use of this tool we do encourage staff to utilize the assessment in order to assist in increasing the effectiveness of employer visits. Attachment 2 to this Notice contains the assessment and guide for working with the assessment. In addition, here is a link to the Business Impact Primer that was part of the assessment process training in 2005.

<http://wtb.wa.gov/Documents/AttachmentCBusinessImpactPrimerSpeakingtheLanguageofEmployers.pdf>

4. BSTs are also encouraged to reach out to Workforce Solutions and involve staff if appropriate in meetings and conversations.

IX. Action Required

None

X. Inquiries

If you have specific technical questions, please contact:

Susan R. Snelick	ssnelick@ncwdb.org	(814)245-1835
Pam Streich	pstreich@ncwdb.org	(814)245-1835

XI. Expiration Date

Ongoing.



WHAT-IF- ED, Education, Workforce

- *View labor availability and payroll for a firm prospect*
- *Compare a firm's occupation needs versus regional supply*
- *Occupation employment, unemployment and potential candidates per job opening*
- *Find related occupations to fill employer needs*

INDUSTRY SNAPSHOT- ED, Education, Workforce

- *Industry employment, wages, and location quotient*
- *Historical employment growth*
- *Replacement demand and growth demand*
- *Forecast regional growth by industry or sector*

OCCUPATION SNAPSHOT - ED, Education, Workforce

- *Occupation employment, unemployment, wages, and location quotient*
- *Historical employment growth*
- *Replacement demand and growth demand*
- *Forecast regional occupation growth*
- *Real-time online job postings*

AD-HOC QUERY - ED

- *A general query tool for a vast assortment of data*
- *Employment, wages, and establishment counts by region*
- *Data by industry, occupation, or regions*

ECONOMIC IMPACT – ED

- *Ripple effects of economic events*
- *Direct, indirect and induced impacts*
- *Employment and sales/output multipliers*
- *Impacts of economic developments or firm closures*
- *Regional industries benefitting from supply chain effects*

MAPS – ED

- *A variety of data displayed via maps*
- *Employment, unemployment and commuting data*
- *Occupation concentration by region of work or residence*

EMPLOYMENT – ED

- *Total employment by industry*
- *Historical trends in regional employment*
- *Year-over-year percentage change in the number of jobs*

DEMOGRAPHIC PROFILE - ED, Education, Workforce

- *Population by age and race; population growth*

- *Forecast occupation growth by industry*

WILLING AND ABLE- WORKFORCE

- *Occupation matches by skill level and wages*
- *Find alternative careers*
- *View related occupation*

AVERAGE WAGE – WORKFORCE

- *Wages per worker by industry*
- *Historical trends in regional wages*
- *Cost of living comparisons by region*

UNEMPLOYMENT RATE – WORKFORCE

- *Historical unemployment rate*
- *Percentage of unemployed by region*
- *Seasonally adjusted or not seasonally adjusted*

OCCUPATION REPORT – WORKFORCE

- *An automatic regional report*
- *Employment: current, historical, and forecast*
- *Unemployment and wages*
- *Jobs by place of work, residence, and industry*
- *Education profile, training, apprenticeships, awards, and Career Readiness Certificate scores*



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DEMOGRAPHIC PROFILE - ED, Education, Workforce

- *Population by age and race; population growth*

- *Labor force (civilian and military) and participation*
- *Educational attainment, foreign-born, unionization and disability rates*
- *Household income and poverty levels*
- *Housing values and vacancy rates*

WORKFORCE CHARACTERISTICS - ED, Education, Workforce

- *Regional industry demographics*
- *Workers by age, gender, education, race, and ethnicity*
- *Turnover, hires, and separations*
- *Wages and earnings in the new and ongoing jobs*

CLUSTERS - ED, Education

- *Regional industry and occupation clusters*
- *Regional competitive advantages*
- *Employment, wages, and forecast growth by clusters*

AWARDS –ED

- *Postsecondary degrees and certifications by region*
- *Awards granted by regional universities and colleges*
- *Education and training program linkages to occupations*

OCCUPATION WAGES - ED, Education, Workforce

- *Average annual wages by occupation*
- *Mean, median and percentile wages*
- *Entry-level and experienced wages*

ECONOMIC OVERVIEW REPORT – ED

- *An automatic report, summarizing a regional economy*
- *Employment, unemployment, wages and historical trends*
- *Industry and occupation mix*
- *Demographic profile, cost of living, and local industry clusters*

TRAINING CONCENTRATION – EDUCATION

- *Postsecondary awards by occupation*
- *Regional education pipeline*
- *Training output comparison versus national norms*

EDUCATION LEVELS - EDUCATION

- *Occupation demand by training requirements*
- *Employment mix and forecast growth by training levels*
- *Entry-level education, work experience, and on-the-job training requirements*

OCCUPATION GAPS – EDUCATION

- *Regional forecast of occupation supply versus demand*
- *Occupations in danger of future surpluses or shortfalls*
- *Employment projections by occupation*

INDUSTRY/OCCUPATION MIX- Education, Workforce

- *Occupation mix within a regional industry*
- *Occupation replacement demand by industry*

- *Forecast occupation growth by industry*

WILLING AND ABLE- WORKFORCE

- *Occupation matches by skill level and wages*
- *Find alternative careers*
- *View related occupation*

AVERAGE WAGE – WORKFORCE

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North Central Workforce Development Board

Assessment and Application

Company Name:			
Contact Name:		Title:	
Address:		Phone:	
City, State		Fax:	
		Email:	
Federal Employer Identification Number (FEIN):	Size of Company: Number of Employees at Location: Employees at Entire Location:		
Product / Service Description:			
Peak Production Period:			

Please respond to the following questions about your firm. In some cases it may be necessary to provide documents to supplement your response.

What are the primary products of your firm?	
Who are your primary customers?	
What are your company's short term goals? (next 12 months)	
What are your steps to achieve these goals? (next 12 months)	
What are your company's long term goals? (next 5 years)	
What are your steps to achieve these goals? (next 5 years)	
What are your annual sales?	
Does your firm have any customer or industry standard certification?	ISO - please specify QS TS Other:

<p>Does your firm plan to obtain industry standard certification within the next two years?</p>	<p>ISO – please specify</p> <p>QS</p> <p>TS</p> <p>Other:</p>
<p>Are any significant re-organizations planned within the next 12 months?</p> <p>Yes No</p>	<p>If yes, please explain:</p>
<p>Has any recent reorganization occurred?</p> <p>Yes No</p>	<p>If yes, please explain:</p>
<p>Do you have plans to increase and / or decrease your current workforce?</p>	<p>If Yes, explain.</p>
<p>What jobs are you currently hiring for?</p>	
<p>Does your firm have a training plan?</p> <p>Yes No</p>	<p>If yes, please provide a copy of the plan.</p>
<p>Does your firm have a training budget?</p> <p>Yes No</p>	<p>If yes, please provide the amount?</p>
<p>Would you be interested in applying for training funding?</p> <p>Yes No</p>	<p>If yes, please complete the attached training plan and budget.</p>
<p>Who needs the training is it managers, first-line supervisors, engineers, skilled trades?</p>	
<p>What skills are needed for employment with your company? (entry level and advanced)</p>	
<p>How are these skills obtained? (i.e. degree / non degree classroom training, on the job training)</p>	
<p>Are you aware of and / or using the North Central Work Readiness Skills Standards (WRSS)?</p> <p>Yes No</p>	
<p>Do you have an aging workforce? If so, have you established a succession plan?</p>	
<p>Is your firm planning on implementing any major new processes during the next two years?</p> <p>e.g. lean, 6 Sigma</p> <p>Yes No</p>	<p>Please explain:</p>
<p>Is your firm planning to adopt any new technologies during the next</p>	<p>Please explain:</p>

<p>two years? e.g. robotics, machine vision</p>							
<p>Do you have any needs / plans for equipment purchase and / or upgrade?</p> <p>Yes No</p>		Please explain:					
<p>Will this result in additional training needs?</p> <p>Yes No</p>		Please explain:					
<p>For each category please provide the following information</p>	Category	No.	Avg. Age	Avg. Years in Position	Avg. Wage	Avg. Education	
	Executive						
	Managers						
	Supervisors						
	Quality						
	Skilled Trades						
	Machinists						
	Others:						
<p>Is your firm unionized?</p> <p>Yes No</p>		If yes, please specify?					
<p>Does your firm have any major safety issues that need to be addressed?</p> <p>Yes No</p>		If yes, please specify?					
<p>Do you have any other comments or are there any areas that were not addressed that you would like more information about or assistance with?</p> <p>Yes No</p>							

Needs Assessment

Designing a process for identifying needs and then developing plans and implementing them successfully involves a sequence of steps that can be grouped into five phases:

1. **Needs assessment-** What are the company's business goals? What is its current state? What is required to get to the future state?
2. **Organizational Objectives-** What are the SMART objectives for achieving the goals?
3. **Plan Development -** What are the elements of program that will meet these objectives? Is there a set sequence? Who is involved? What are the costs?
4. **Implementation -** Who is responsible for making it happen? How is this communicated?
5. **Evaluation -** What are the metrics? What are the on-going metrics? What are the outcomes?

The Assessment Process

In order to be effective and efficient, start with a needs assessment. The needs assessment step includes gathering and analyzing information about the:

- **Company's goals and objectives-** What are its business goals for the next year? Five years?
- **Performance issues -** what issues are limiting the company's performance to meet its goals? What are perceived to be the root causes of those issues?
- **Jobs and related tasks that need to be learned-** Is the company implementing a new technology, process or product? Are customers requiring certification?
- **Competencies and skills that are need to perform the job-** Are there cycle time or quality issues?
- **People who are to be trained-** Who needs the training is it managers, first-line supervisors, engineers, skilled trades?

The needs assessment is necessary for identifying a baseline for measuring:

- **What the organization expects to happen and what actually happens;**
- **Current and desired job performance; and**
- **Existing and desired competencies and skills.**

It is always important to remember that training is not always the solution. Many performance gaps can be reduced or eliminated through other management solutions such as: communicating expectations; providing a supportive work environment; arranging consequences; removing obstacles; and checking job fit.

Needs Assessment analyzes the company and determines where and why human capital development is needed and under what conditions it will be conducted. This must be done in response to organizational goals- how effective is the organization in

meetings its goals, and resources available – what resources are available; and current, available expertise within the organization.

The organizational analysis should identify:

- New regulatory requirements, such as ADA, FMLA, OSHA, etc.);
- Customer requirements, such as TS and ISO;
- Organizational efficiencies and quality such as lean manufacturing and 6-Sigma;
- Work force demographics and cultural or language barriers;
- Adoption of new technology and processes;
- Organizational readiness from top management support and to employee attitudes.

It is often for difficult for companies to conduct their own needs analysis. This is particularly true of smaller firms where people are very involved in the on-going operations. Self-assessments combined with site visits are the suggested approach. Site visits provides an avenue for a discussion with people about their responses and for a fresh set of eyes to look at the organization.

It is important to think beyond specific training needs when conducting the assessment process. All too often firm self diagnose incorrectly. The site visit is the opportunity to ask probing questions and to seek confirmation from multiple parties as well as to see if the physical characteristics match the information that has been received.

Assessment Process

Company Name:			
Contact Name:		Title:	
Address:		Phone:	
City, State		Fax:	
		Email:	
Tracking Information			
Self Assessment	Sent:		
	Returned:		
On-Site Assessment	Scheduled:		Team:
Training Plan	Draft:		
	Reviewed with Company:		

Self Assessment

Company Name:			
Contact Name:		Title:	
Address:		Phone:	
City, State:		Fax:	
		E-mail:	

Please respond to the following questions about your firm. In some cases it may be necessary to provide documents to supplement your response.

What are the primary products of your firm?	
Who are your primary customers and where are they located?	
What are your company's goals for 2005-2006?	
What are your objectives for 2005-2006?	
What are your company's goals for 2010?	
What are your objectives for 2010?	
What are your annual sales?	
Does your firm have any customer or industry standard certification?	ISO - please specify QS TS Other:
Does your firm plan to obtain industry standard certification within the next two years?	ISO - please specify QS TS Other:
Are any significant re-organizations planned within the next 12 months?	
Does your firm have a training plan?	If yes, please provide.
Does your firm have a training budget?	If yes, what is the amount? Compared to last year, is this an increase, decrease, or about the same? If an increase or decrease, why? Do you anticipate that next year this budget will increase, decrease, or remain about the same?
Is your firm planning on implementing any major new processes during the next two	If yes, please specify.

years? e.g. lean, 6 Sigma							
Is your firm planning to adopt any new technologies during the next two years? e.g. robotics, machine vision		If yes, please specify.					
For each category please provide the following information	Category	No.	Avg. Age	Avg. Years in Position	Avg. Wage	Avg. Education	
	Executive						
	Managers						
	Supervisors						
	Quality						
	Skilled Trades						
	Machinists						
	Others:						
Are there succession plans in place for key positions?							
Is your firm unionized?		If so, please specify?					
Does your firm have any major safety issues that need to be addressed?		If so, please specify?					

On-Site Assessment Protocol

1. Prior to the on-site assessment, review the self-assessment and materials that were provided to identify any performance related items.

What are the primary products of your firm?	<i>Is this a market that is growing or shrinking? Who are the major competitors?</i>
Who are your primary customers?	<i>Are the customers stable or unstable? Are they local, national, or global? What national or global conditions may impact the viability of those customers?</i>
What are your company's goals for 2005-2006?	<i>Do the objectives and the goals connect?</i>
What are your objectives for 2005-2006?	<i>Are these quantifiable? Ask for their metrics and reporting process.</i>
What are your company's goals for 2010?	<i>Do the objectives and the goals connect?</i>
What are your objectives for 2010?	<i>Are these quantifiable? Ask for their metrics and reporting process.</i>
What are your annual sales?	<i>Are increasing sales a part of the objectives?</i>
Does your firm have any customer or industry standard certification?	<i>Does the response make sense? If the firm is selling to automotive companies do they have the certification? If they want to pursue international trade, do they have ISO?</i>
Does your firm plan to obtain industry standard certification within the next two years?	<i>Are these realistic?</i>
Are any significant re-organizations planned within the next 12 months?	<i>If so, make sure to gather information.</i>
Does your firm have a training plan?	<i>If yes, please provide. Review and relate to responses</i>
Does your firm have a training budget?	<i>If yes, what is the percentage of payroll? If not, how is training supported?</i>
Is your firm planning on implementing any major new processes during the next two years? e.g. lean, 6 Sigma	<i>Make sure to research the processes to gain an understanding of the training implications.</i>
Is your firm planning to adopt any new technologies during the next two years? e.g. robotics, machine vision	<i>Make sure to research the technology to gain an understanding of the training implications.</i>

For each category please provide the following information	Category	No.	Avg. Age	Avg. Years in Position	Avg. Wage	Avg. Education	Review the responses.
	Executive						Do the ratios align with staffing patterns for the industry?
	Managers						
	Supervisors						
	Quality						Are retirements pending?
	Skilled Trades						Are the wages in line with others?
	Machinists						Do the educational levels match the standard O*Net educational levels required for these positions?
	Others:						
Is your firm unionized?	<i>Make sure to find out about union relations. Meet with a union rep. if possible.</i>						
Does your firm have any major safety issues that need to be addressed?	<i>Has the firm received any major citations?</i>						

Schedule a meeting at the company. Generally, the site visit will take four hours depending on the size of the company. The site visit should include meeting with:

- a) **The Leadership-** This may be the president, it may be a team.
 - b) **At least one person from each of the specified categories;**
 - c) **The HR director to obtain copies of job descriptions etc.**
 - d) **Tour the entire facility.**
- **Questions for the Leadership-** This may be the president, it may be a team.
- ◆ **Ask about their plans for the company;**
 - ◆ **Ask about customer requirements and their impact on the organization.**
 - ◆ **Ask about new technologies and how they will change the way the company operates.**
 - ◆ **Ask how strategic information is communicated throughout the company.**
 - ◆ **Ask about their leadership approach and practices.**
- **Tour the entire facility.**
- ◆ **Is the plant clean and well lit?**
 - ◆ **Are the aisles clean of debris?**
 - ◆ **Are safety procedures being practiced?**
 - ◆ **Are people working in teams, cells or other patterns?**
 - ◆ **Do the machines look clean and well maintained?**
 - ◆ **Is there evidence of quality charting? Do they have scrap and re-work issues?**
 - ◆ **Ask for an explanation of the process from sale to delivery. What is the cycle time? Is this a large run or small batch process? How customized is the product?**
- **Questions for each of the specified categories;**
- ◆ **It is important to meet with people from different levels of the organization. The intent is to find out if the groups are saying the same things or not.**
 - ◆ **Ask about customer requirements and their impact on the organization.**
 - ◆ **Ask about new technologies and how they will change the way they do their work.**
 - ◆ **Ask how strategic information is communicated throughout the company.**
 - ◆ **Ask them to show you what they do and explain it to you.**
 - ◆ **Ask them how they learned their job and how they learn new things.**
 - ◆ **Ask how a need for further training is identified.**
- **Questions for the HR director to obtain copies of job descriptions etc.**
- ◆ **Ask about customer requirements and their impact on the organization.**

- ◆ **Ask about regulatory requirements and their impact.**
- ◆ **Ask how frequently job descriptions and classifications are reviewed and updated.**
- ◆ **Ask about issues such as absenteeism, turnover, and retirements.**
- ◆ **Ask if the firm does succession planning.**
- ◆ **Ask how people are promoted and rewarded for good work.**
- ◆ **Ask how strategic information is communicated throughout the company.**
- ◆ **Ask how training and development is conducted.**

Developing a Plan

... American industries annually spend more than \$100 billion on training... not more than 10% of this expenditures actually result in transfer to the job ... researchers... similarly concluded .. much training fails to transfer to the work setting.

Ford and Weissbein, 1997

Review all of the information that you have collected. Look for discrepancies between documents and what you have seen and what you have heard.

For example:

- How old is the business plan? Does it match what you were told? Is it clearly articulated? Communicated?
- Was the shop floor clean? Did the work seem to flow smoothly? Were there job aids? Were there obvious safety issues?
- Was there a great deal of inventory?
- Did you hear the same things from different people?
- Is the top management on board?

What are the key findings?

- Make a list of the main things that you learned
- What of these relate to people issues?
- What are the people issues?
- What are possible solutions?
- What are the pros and cons of each?
- What is the impact of the change?
- What is the cost of doing nothing?

What are the main recommendations?

Based on your review-

- What actions are you going to recommend?
- How do these actions relate to achieving corporate goals?

What are the measures?

- Go beyond event measures

- **Relate the measure to process**
- **Relate the measures to corporate goals**
- **How often will results be provided? To whom?**
- **How will changes be made?**

Presenting the Plan

Keep it straight forward and simple!

Writing a lengthy report is not necessary and is often ineffective. Using a PowerPoint format with bulleted information is a good approach.

- **What are the company's plans for the future?**
- **What are the results of the needs assessment? What is the current state? What are the gaps?**
- **What are the options for closing the gaps? What are the choices? What are the timeline and the costs?**
- **How does this help the company achieve its business objectives?**
- **Who needs to make the decision?**

Implementing the Plan

Getting companies to move from plan to action takes a decision to move ahead. These decisions involve:

- **Leadership-** Successful implementation requires that senior level decision makers support the plan and communicate its importance. Internal champions are a critical element!
- **Assistance in identifying resources-** Resources for implementation can take many forms from identifying rooms for training, obtaining funds for external consultants and training, to providing time to subject matter experts.
- **Serve as a broker for providers-** What role can your organization in acting as a neutral broker for consultants and trainers?
- **Serve as a project manager for implantation-** Work with the company to coordinate implementation of the plan.



**North Central Workforce Development Board
Disaster Recovery Plan
Policy Effective Date – July 1, 2017**

Purpose: To provide Disaster Recovery Plan as required by the Workforce Innovation and Opportunity Act (WIOA) to ensure protection of all WIOA and other electronic information.

Background: All Workforce Solutions data resides on servers or storage devices located at the main site in Ridgway PA. These devices are located in a secure area accessed by passcode only. All major systems use third party software purchased through industry recognized vendors. In the event of a catastrophic event these vendors will provide the software for Workforce Solutions to reload all files necessary to continue operation. Below are the processes that are used by Workforce Solutions to conduct business for all their entities and the backup strategy.

Plan:

- Payroll / Human Resources – Vendor – AccuFund, Inc. : All files are backed up daily to a local storage device. A weekly backup is stored off-site.
- Accounting - Vendor – AccuFund, Inc: All files are backed up daily to a local storage device. A weekly backup is stored off-site.
- All Workforce Solutions staff and department files exist on a file server in the secured area. These files are backed up locally Monday through Friday. A 4 week rolling backup is off-site.
- Workforce Solutions website and database information is also backed up daily Monday through Friday of each week.
- It is the expectation of Workforce Solutions that all subcontractors will have a disaster recovery plan that is approved by the board.

Expiration: Ongoing

Inquiries

Questions should be directed to: Susan R. Snelick ssnelick@ncwdb.org 814-245-1845

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