



“Dedicated to developing and sustaining a skilled and educated workforce to respond to current and emerging labor market needs by addressing the skills gap and enhancing the youth pipeline to effectively position the Greater Lowell community for continued success in the 21st century.”

STRATEGIC PLAN

2009 – 2014

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Greater Lowell Workforce Investment Board

**Strategic Plan
2009 – 2014**

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Introduction and Planning Methodology

The Greater Lowell Workforce Investment Board, Inc. (GLWIB) is the organization that funds and oversees workforce development programs in Lowell, Massachusetts, and 7 surrounding towns: Billerica, Chelmsford, Dracut, Dunstable, Tewksbury, Tyngsboro and Westford. In November 2008, GLWIB retained independent consultant Alan Brickman to facilitate a strategic planning process.

This five-year plan addresses both programmatic and organizational aspects of the GLWIB's operations, and is intended to position the GLWIB to maximize the impact of its resources on workers and job seekers in the region, on the workforce needs of local employers, and on the economic development of the region as a whole. In addition, the plan is designed to align with the overall efforts of the Massachusetts workforce development system in support of the **Governor's three stated priorities:**

- **Build capacity of the workforce system;**
- **Close the skills gap that exists between available workers and employers;**
- **Enhance the youth pipeline.**

A Strategic Planning Committee was established to work with the consultant on the development of the plan. The Committee identified the key strategic issues to be deliberated in the process; specified the quantitative and qualitative data to be gathered to inform the development of the plan; designed a full-day planning session open to GLWIB members, Youth Council Members, and GLWIB staff; and refined and further developed the consensus from this planning session. In addition, the consultant worked extensively with GLWIB staff between meetings to develop draft documents for review by the Committee. The strategic plan was adopted by the full Board at a meeting on February 26, 2009.

The GLWIB has made a serious commitment to data gathering and documentation, and much of the labor market and program data necessary for the planning process had already been assembled. GLWIB's existing data, the additional data gathered for this process (described in greater detail below), and the participation by GLWIB members and others on the Strategic Planning Committee and at the full-day planning session, provided input into the plan from the full range of GLWIB stakeholder constituencies. This plan is a natural continuation of the GLWIB's ongoing commitment to documentation and planning, is well rooted in both labor market data and stakeholder input, and represents an exciting vision of the future of the GLWIB.

Analysis of the Current Environment

The data accessed and reviewed for the strategic planning process included the following:

- a) Regional labor market information assembled and synthesized by Northeastern University's Center for Labor Market Studies;
- b) The US Census Bureau's American Community Survey data for 2007;
- c) Service statistics and performance reports from the Greater Lowell Career Center;
- d) Profile of Unemployment Insurance claimants in the region prepared by the Massachusetts Executive Office of Labor and Workforce Development, Division of Unemployment Insurance, Economic Research Department;

This data had three levels of review and analysis: the GLWIB staff working with the planning consultant, the strategic planning committee composed of selected GLWIB staff and Board members as well as other community members, and a full-day strategic planning session involving the full Board. In these forums, key messages or trends in the data that had ramifications for regional policy and priorities were identified, and used as the basis for establishing strategic directions for the GLWIB over the coming three to five years.

NOTE: The statistical data we have accessed for the planning process is as current as is available. Many of these studies and statistics were compiled prior to the current economic downturn. (In fact, the Northeastern report refers to the "current economic recovery.") The level of unemployment and the number of jobs and job vacancies have changed substantially since the second half of 2008. The data has still been useful to indicate trends and inform the decisions that comprise the strategic plan. The GLWIB is committed to accessing and using the most current data available as we continue to refine and adjust the strategic plan over time.

The key trends that have policy implications identified by the Board members include the following.

The Regional Workforce

- The overall population of the region is decreasing, but there is an increasing population of immigrants;
- The region's population is aging, the numbers and percentages of individuals under 45 years is decreasing and those over 45 years is increasing,. As a related matter, there is a slight overall increase in the working age population;
- Foreign-born, immigrant population has lower levels of educational attainment than do native population, although there is a significant percentage of college educated individuals among the immigrant population of the region;

- There is an overall increase in educational attainment among residents of Greater Lowell, including fewer high school dropouts, and increased percentages of residents with Associates, Bachelors, and graduate level degrees.
- Approximately half the individuals who work in the Greater Lowell area also live in the Greater Lowell area.

Employers and Employment Trends

- Job growth shown during 2004 – 2005 was slowing significantly by 2007 – 2008.
- Job growth in Greater Lowell lagged behind that of Massachusetts as a whole between 2004 and 2007.
- The five largest sectors which include Manufacturing (16.6%), Health Care and Social Assistance (11.9%), Professional and Technical Services (8.6%), Retail Trade (8.4%), and Accommodation and Food Services (7.4%), comprise more than half the jobs (52.9%) in the Greater Lowell economy.
- Health care and social assistance is the region’s largest employment sector, and experienced significant job growth 2004 – 2007. The professional and technical services industry in the Greater Lowell region, which is heavily focused in these ‘high technology’ fields, expanded its overall employment levels considerably over the last several years. The manufacturing sector continues to experience significant job losses in the region, while the construction, retail and finance and insurance sectors experienced slight job losses during this same period.
- Small employers (less than 20 employees) account for almost 85% of the employers, but only 20% of the jobs.
- Across employment sectors, including the traditionally blue-collar industries such as manufacturing and construction, there is a strong trend toward an increasing percentage of jobs requiring higher-level skills and credentials, including postsecondary degrees and certificates.
- There was a slight increase in job vacancies from the 4th quarter of 2006 to the 4th quarter of 2007 in the Northeast region of Massachusetts, reflecting a similar increase for the state as a whole.

Job Vacancies

- In the region, high vacancy rates in such industries as healthcare, professional and technical services, and finance and insurance are related to a shortage of labor supply, while similarly high vacancies rates in retail, food services, and arts and entertainment are related to high turnover. The jobs in “college labor market” fields tend to have a higher than average vacancy rate for employers in the region as a whole.
- The postsecondary institutions in Greater Lowell are generating a mix of Associates degrees, Bachelors degrees, and non-degree certificates that is appropriate to and aligned with the labor needs of the region’s employers, especially in engineering and computer science, business administration, and healthcare.

Additional stakeholder input sought for the development of the strategic plan included:

- a) The deliberations of a strategic planning committee composed of GLWIB staff and Board members as well as other community representatives;
- b) A full-day strategic planning session with the full GLWIB;

- c) An online survey completed by members of the Board;
- d) Interviews conducted with the following individuals representing employers, municipal government, economic development entities, community-based organizations, and educational institutions:
 - Bob Halpin, Merrimack Valley Economic Development Council
 - Jim Cook, Lowell Plan
 - Jay Donovan, Northern Middlesex Council of Government
 - Peter Milano, Massachusetts Office of Business Development
 - Theresa Park, City of Lowell
 - Paul Driscoll, Comcast
 - Stephanie Messina, Market Basket
 - Robert Gilman, Enterprise Bank
 - Kevin Coughlin, Saints Medical Center
 - Jeanne Osborn, Greater Lowell Chamber of Commerce
 - Karen Frederick, Community Teamwork Inc.
 - Vong Ross, Cambodian Mutual Assistance Association
 - Christopher Brennan, Middlesex Community College, Center for Business and Industry
 - Sue D'Amore, UMass Lowell Labor Extension Program
 - Nancy Harrington, Greater Lowell Technical HS
 - Kathy Kendrick, UMass-Lowell Continuing and Corporate Education

The themes emerging from the interviews are the following:

- a) The primary needs of employers in the region include:
 - Customized training directly targeted to their specific needs;
 - Higher skilled and higher level workers, including: IT, customer service, sales, engineering, project management, finance;
 - Because some employers often want to do their own industry- or workplace-specific training with people who already have a BA, they want a pipeline of credentialed people who are ready to work;
 - Assistance developing career ladders in order to most effectively promote from within;
 - Health care will continue to be a strong part of the local employment base, need for credentialed people (RNs, ...), and support for career ladders (LPN to RN, for example)
 - More information to promote awareness of the resources available through the WIB and the Career Center
- b) The strengths of the public workforce development system in the region are seen as:
 - Staff (WIB and Career Center);
 - Career Center seen as very effective at service delivery;
 - WIB is a great source of information and labor market data.

- c) There is a broad lack of awareness and understanding of the WIB and its activities, and of the respective roles of the various pieces of the publicly funded workforce development system. There is a need for greater visibility, outreach, and marketing on the part of the WIB.
- d) There are a number of specific new or expanded roles for the WIB that respondents recommended, including:
- Facilitate greater coordination among training providers
 - Act in a broker role, connecting employers and specific programs or resources
 - Develop programs and initiatives in the biotech and green jobs areas, but it is important to stay “ahead of the curve,” and reach out to and collaborate with the relevant industry associations
 - In this climate, focus on laid off workers and retraining; manufacturers are retooling for high tech manufacturing, medical devices, etc., and there are retraining needs; need to balance putting unemployed people quickly back to work and retraining that meets employers higher level skill needs
 - Focus on outreach to growing populations in the workforce, such as: Immigrants (important to work with the Latino and Asian population, build those parts of the workforce, requires cultural competency and adequate investment); and older youth, 18-24 years.
 - A question was raised about the most effective and responsive model for multi-employer initiatives: Should these efforts be defined by industry sector or by common skill area?
- e) There were a number of suggestions for creating stronger links between the workforce development system and economic development entities and initiatives, including:
- Need to link more with the economic development entities and initiatives, to be “at the table;”
 - There is a willingness to engage and collaborate with the WIB on the part of municipal governments and regional economic development entities, and in particular a willingness to broker relationships between the WIB and other relevant organizations (businesses, industry associations, ...).
 - WIB should create workforce pipelines in areas where there is job growth
 - The link with postsecondary is critical to support economic development
 - Redevelopment of the Hamilton Canal has the potential for significant job growth, and the WIB needs to be part of the discussion regarding this and similar types of infrastructure development projects.
 - Need to create and expand ongoing relationships with municipal governments, economic development people, HR directors, labor organizations, ...
 - Workforce is seen as a secondary issue for business relocation or expansion (permitting, tax incentives, infrastructure, cost, ... are the top issues)
- f) Specific recommendations for building the capacity and effectiveness of the Board include:
- Need to better use the Board for policy discussions, outreach, ...
 - Increase employer involvement in the WIB; employers resist becoming involved with the public system: red tape, reporting requirements, target job seeker population, other restrictions

Finally, the Board reviewed and discussed this data and stakeholder perspective at the full-day planning session held on February 6, 2009. The conclusions and synthesis that were articulated in those discussions included the following:

- 1) There are meaningful financial resources available to implement workforce initiatives targeted to the specific needs of the region, but the GLWIB needs to build relationships and create partnerships as a strategy for ensuring the best use of existing resources.
- 2) While the region's workforce is trending toward higher educational attainment, it still lags behind rest of the state.
- 3) The transformation of the manufacturing sector to higher skill, higher wage jobs is a significant trend that the GLWIB must respond to.
- 4) There is a need to position the WIB through strategic leadership for after the current economic downturn.
- 5) It is especially important for the GLWIB to engage and serve the immigrant population.
- 6) Skill development is a better choice for some job seekers than a quick job placement.
- 7) The GLWIB needs to target specific skill sets for training.
- 8) There is a strong need for the GLWIB to increase the marketing and visibility of the publicly funded workforce development system.
- 9) Careers are volatile, need to training for adaptability and transferable skills and it is important to develop and sponsor programs that reach the older population, with a focus on retraining.

Mission and Vision

The mission of the GLWIB is as follows:

The Greater Lowell Workforce Investment Board (GLWIB) is a collaborative involving employers, educational institutions, labor groups, municipal and state officials, and community-based organizations that provides leadership, policy direction, and accountability for the local workforce development system.

By securing and allocating public and private funds for high quality, innovative, and collaborative workforce development programs, the GLWIB promotes a skilled and educated workforce, meets the workforce needs of employers, and supports and sustains economic development, business competitiveness, and job creation in Greater Lowell.

To augment the mission, the Board has developed a vision statement that characterizes the desired future for both the workforce development system and its various beneficiaries in the Greater Lowell Region. That vision statement is as follows:

By the year 2014:

- *Work is recognized and supported as a basic human need and the GLWIB is an uplifting source of hope for both individuals and employers in the region.*
- *The workforce development system has a strong and effective focus on career development with an emphasis on high skill, high wage jobs, and all individuals in the region have the information and support to make the best choices about their career futures, and are fully aware of the range of alternatives.*
- *The WIB has developed a clear public identity and recognized brand as the “go to” place for responsive and forward-looking information, leadership and policy direction on workforce development.*
- *The GLWIB has successfully engaged all constituencies, including youth, and all the relevant sectors of the community in collaborative activities that promote workforce development.*
- *The GLWIB has developed and sustained a local workforce that meets the needs of the employer sector and can respond to emerging trends among the region’s employers.*
- *The GLWIB has contributed significantly to the overall economic health of the region including higher wages and increased financial security for families; increased business competitiveness; a greater number of high skill, high wage jobs; increased high school and postsecondary completion rates that produce a reliable youth pipeline of skilled*

workers; and an overall quality of life that attracts and retains individuals and families in the Greater Lowell region.

Strategic Goals and Objectives

The following strategic goals and objectives provide an overall framework for all the GLWIB's activities over the coming 5-year period. They address the **dual customer model** of the workforce development system (i.e., workers/job seekers and employers), and they are aligned with and support the **Governor's three workforce development priorities**: the youth pipeline, reducing the skills gap, and building the capacity of the workforce development system.

Goal #1: To promote a highly skilled and educated workforce capable of earning a sustaining wage, and to ensure access for all individuals and families in the region to opportunities for ongoing employment services and career development.

Objectives

- 1.a) Convene, coordinate, and align the efforts of skills training and career services providers in the region to ensure the maximum impact of existing resources and maximum access to services for all individuals who live or work in Greater Lowell.
- 1.b) Collaborate with school systems, vocational high schools, postsecondary institutions, and community-based youth-serving agencies to develop and implement workforce initiatives that create a reliable youth pipeline that will prepare students for high skill, high wage jobs and careers.
- 1.c) Develop and implement culturally competent workforce initiatives specifically targeting selected populations of workers and job seekers such as youth, immigrants, older workers, disabled workers, veterans, TANF families, and others, including educating employers about working effectively with the identified populations.
- 1.d) Collaborate with employers (large and small), industry associations, and labor unions to provide opportunities for work-based job training, apprenticeships, and internships that support access to industry-specific credentials and licenses.

Goal #2: To meet the workforce needs of current and future employers, thereby supporting economic development, business competitiveness, and job growth in Greater Lowell.

Objectives

- 2.a) Develop and implement innovative and market-driven workforce initiatives that target the needs of critical industries in the region (such as manufacturing and health care), as well as the needs of new and emerging industries focused on green jobs, alternative energy, biotech, life sciences, and medical devices.

- 2.b) Develop and implement processes for ongoing communication and collaboration with employers (large and small) that ensure a current and in-depth understanding of their workforce needs and challenges, and that support the GLWIB's rapid response capability with respect to the changing needs of employers.
- 2.c) Develop and implement greater coordination and collaboration with local economic development entities and municipal governments in order to position the GLWIB as a valuable resource to efforts to locate and expand businesses and employment opportunities in the region.

Goal #3: To enhance the organizational effectiveness and capacity of the GLWIB to provide leadership in the region, to engage key stakeholders, and to maximize the use of resources to establish and sustain an effective workforce development system.

Objectives

- 3.a) Develop a sophisticated marketing, public communication, and branding effort that will promote increased visibility, understanding, and support for the GLWIB and the other components of the region's workforce development system.
- 3.b) Develop and implement a resource development plan through which the GLWIB can identify and secure increased public (i.e., state, federal, municipal) and private (i.e., foundations, corporations, local employers, individuals) funding to support programs driven by the identified workforce and labor market needs of the region.
- 3.c) Develop and implement the Board's structure (including member recruitment and retention; constituent engagement strategies; working committees; orientation and training for members; partnerships with other entities; etc.) to maximize the members' substantive contributions to the impact and effectiveness of the GLWIB.
- 3.d) Develop and implement a process for tracking, documenting, and analyzing short- and longer-term customer outcomes, and routinely use that analysis to drive workforce development policies and priorities in the region.

Implementation Plan and Metrics

The following charts are the implementation plan for all the goals and objectives in the strategic plan. The charts present:

- Key action steps for each of the objectives in three time periods: Year 1, Years 2 and 3, and Years 4 and 5;
- Resources required for implementation, especially human resources, i.e., staff, Board, and Board committees;
- Implementation and outcome metrics by which GLWIB can assess progress.

This implementation plan should be a tool for the staff and Board to plan implementation, distribute the workload, and establish shared accountability for results.

Goal #1: To promote a highly skilled and educated workforce capable of earning a sustaining wage, and to ensure access for all individuals and families in the region to opportunities for ongoing employment services and career development.

| <u>Objective 1.a) Convene, coordinate, and align the efforts of skills training and career services providers in the region to ensure the maximum impact of existing resources and maximum access to services for all individuals who live or work in Greater Lowell.</u> | | <u>Implementation and Outcome Metrics</u> | |
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| | | <ul style="list-style-type: none"> • Annual convened meetings of providers • Meet or exceed Business Plan targets for # of individuals receiving workforce services • Corrective action plans for identified gaps in service | |
| ACTION STEPS | Year 1 | Years 2 & 3 | Years 4 & 5 |
| | Convene training providers to identify potential areas for collaboration and coordination Develop and disseminate asset map of existing resources for training and workforce services Identify gaps and develop corrective action plans to address them Implement recommendations for increased efficiency, reduced redundancy, and greater alignment | Evaluate program effectiveness Negotiate contract renewals based on evaluation Develop traveling presentation by selected providers to employers | Assess and modify/expand |
| Resources Needed | WIB and Career Center staff Provider liaisons Funding to fill service gaps | WIB and Career Center staff Provider liaisons Funding to fill service gaps | WIB and Career Center staff Provider liaisons Funding to fill service gaps |

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| <p>Objective 1.b) Collaborate with school systems, vocational high schools, postsecondary institutions, and community-based youth-serving agencies to develop and implement workforce initiatives that create a reliable youth pipeline that will prepare students for high skill, high wage jobs and careers.</p> | <p><u>Implementation and Outcome Metrics</u></p> <ul style="list-style-type: none"> • Meet or exceed Business Plan targets for # of workforce programs in schools and colleges • Meet or exceed Business Plan targets for # of students and out-of-school youth participating in programs • Sufficient funding for school-based programs as per Business plan • Meet or exceed Business Plan targets for # of youth receiving relevant credentials (diploma, GED, Associates degree, or certificate) • 2 to 3 new Youth Council members per year (with a focus on employers and representation from all towns) | | |
| <p>ACTION STEPS</p> | <p>Year 1</p> <p>Evaluate effectiveness of current GLWIB-funded secondary and postsecondary programs; publish annual report on youth serving programs</p> <p>Meet with schools, colleges, and CBOs to determine needs and priorities</p> <p>Review and update guidelines for funding, review proposals and allocate funds</p> <p>Collaborate with schools, colleges, and CBOs on efforts to secure additional funding from public and private sources</p> <p>Recruit new members of the Youth Council</p> | <p>Years 2 & 3</p> <p>Evaluate program effectiveness</p> <p>Negotiate contract renewals based on evaluation</p> <p>Establish and convene Educational Advisory Committee (secondary and postsecondary) to develop innovative collaborative programs</p> <p>Fund innovative pilot projects</p> <p>Continue and expand collaborative fundraising efforts</p> <p>Continue recruitment of Youth Council members</p> | <p>Years 4 & 5</p> <p>Evaluate programs, allocate renewal funding based on evaluations</p> <p>Expand and replicate successful pilot projects</p> <p>Continue and expand collaborative fundraising efforts</p> <p>Continue recruitment of Youth Council members</p> |
| <p>Resources Needed</p> | <p>WIB and Career Center staff School, college, and CBO liaisons State funding and support</p> | <p>WIB and Career Center staff School, college, and CBO liaisons State funding and support</p> | <p>WIB and Career Center staff School, college, and CBO liaisons State funding and support</p> |

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| <p><u>Objective 1.c) Develop and implement culturally competent workforce initiatives specifically targeting selected populations of workers and job seekers such as youth, immigrants, older workers, disabled workers, veterans, TANF families, and others, including educating employers about working effectively with the identified populations.</u></p> | | <p><u>Implementation and Outcome Metrics</u></p> <ul style="list-style-type: none"> • Meet or exceed Business Plan targets for # of individuals in the target groups participating in programs • Increase collaboration with 2 to 3 new community agencies per year • Meet or exceed Business Plan targets for # of placement-ready individuals in youth pipeline | |
| <p>ACTION STEPS</p> | <p>Year 1</p> <p>Convene representatives of Youth Council, schools, state agencies, and community-based organizations to discuss outreach and program development to respond to the needs of the identified populations.</p> <p>Develop and disseminate outreach and service delivery guidelines related to the target populations for employment services vendors</p> <p>Seek funding from public and private sources to expand program slots</p> | <p>Years 2 & 3</p> <p>Develop innovative program models addressing the unique needs of the target populations, develop and disseminate RFPs, identify and fund providers.</p> <p>Continue to meet with community representatives to get feedback on programs and changing needs of the target populations</p> <p>Develop and disseminate cultural competency training materials for employers regarding working with target populations</p> <p>Continue and expand fundraising efforts</p> | <p>Years 4 & 5</p> <p>Continue and expand programming, community engagement, and fundraising</p> |
| | <p>Resources Needed</p> <p>WIB and Career Center staff Workforce Issues Committee State funding and support Model program documentation Community partner liaisons</p> | <p>WIB and Career Center staff Workforce Issues Committee State funding and support Community partner liaisons</p> | <p>WIB and Career Center staff Workforce Issues Committee State funding and support Community partner liaisons</p> |

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| Objective 1.d) Collaborate with employers (large and small), industry associations, and labor unions to provide opportunities for work-based job training, apprenticeships, and internships that support access to industry-specific credentials and licenses. | | Implementation and Outcome Metrics | |
| | | <ul style="list-style-type: none"> • Meet or exceed employer targets for # of individuals participating in work-based programs • Increase # of employers sponsoring programs by 1 or 2 per year | |
| ACTION STEPS | Year 1 | Years 2 & 3 | Years 4 & 5 |
| | <p>Meet with employers, industry associations, and organized labor representatives to develop preliminary inventory of apprenticeship and internship opportunities.</p> <p>Develop training materials for job seekers and employers on apprenticeships and internships</p> <p>Identify and fund vendor(s) to coordinate and support placements.</p> <p>Begin placing apprenticeships and internships</p> | <p>Evaluate effectiveness of the placements, and revise model based on the evaluation</p> <p>Expand recruitment of employers willing to offer apprenticeships and internships</p> <p>Convene employer representatives responsible for apprenticeships and internships to share experiences and strategize program improvements and expansion.</p> <p>Seek funding to support program expansion</p> | Continue and expand |
| Resources Needed | <p>WIB and Career Center staff</p> <p>Employers with placement slots</p> <p>Apprenticeship programs (unions, industry groups, etc.)</p> <p>State funding and support</p> | <p>WIB and Career Center staff</p> <p>Employers with placement slots</p> <p>Apprenticeship programs (unions, industry groups, etc.)</p> <p>State funding and support</p> | <p>WIB and Career Center staff</p> <p>Employers with placement slots</p> <p>Apprenticeship programs (unions, industry groups, etc.)</p> <p>State funding and support</p> |

Goal #2: To meet the workforce needs of current and future employers, thereby supporting economic development, business competitiveness, and job growth in Greater Lowell.

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| <p>Objective 2.a) Develop and implement innovative and market-driven workforce initiatives that target the needs of critical industries in the region (such as manufacturing and health care), as well as the needs of new and emerging industries focused on green jobs, alterative energy, biotech, life sciences, and medical devices.</p> | | <p>Implementation and Outcome Metrics</p> <ul style="list-style-type: none"> • Increase # of sectoral initiatives by 1 per year • Increase # of initiatives in emerging industries by 4 over the course of the plan • Sufficient funding for sectoral initiatives • Increase # of employer and other partners by 2 to 3 per year • Meet or exceed # of job placements in the plans for each of the sectoral initiatives | |
| <p>ACTION STEPS</p> | <p>Year 1</p> <p>Review existing sectoral initiatives, convene employer representatives to discuss changes to the model(s)</p> <p>Identify new programs to develop in selected industries, develop curriculum, recruit participants</p> <p>Reach out to employers and industry associations in life sciences, green technology, medical devices, medical records technology, etc. to explore workforce initiatives in emerging industries</p> <p>Seek funding (public, private, employer match) for program development</p> | <p>Years 2 & 3</p> <p>Evaluate pilots, expand and replicate successful components</p> <p>Identify additional industries (traditional and emerging) to develop sectoral initiatives</p> <p>Formalize sectoral initiative by convening industry-specific leadership groups of employer representatives</p> <p>Continue and expand fundraising</p> | <p>Years 4 & 5</p> <p>Continue and expand programming, employer recruitment, and fundraising</p> |
| | <p>Resources Needed</p> <p>WIB and Career Center staff Employer and industry liaisons Workforce Issues Committee Educational instits./training vendors State funding and support</p> | <p>WIB and Career Center staff Employer and industry liaisons Workforce Issues Committee Educational instits./training vendors State funding and support</p> | <p>WIB and Career Center staff Employer and industry liaisons Workforce Issues Committee Educational instits./training vendors State funding and support</p> |

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| <p>Objective 2.b) Develop and implement processes for ongoing communication and collaboration with employers (large and small) that ensure a current and in-depth understanding of their workforce needs and challenges, and that support the GLWIB’s rapid response capability with respect to the changing needs of employers.</p> | | <p><u>Implementation and Outcome Metrics</u></p> <ul style="list-style-type: none"> • Perform annual employer survey • Increase # of employers participating in needs assessment process by 10% per year • Develop and disseminate updated annual report of employer needs | |
| <p>ACTION STEPS</p> | <p>Year 1</p> <p>Survey employers about their workforce needs, disseminate annual report of identified needs</p> <p>Convene focus groups (by industry, by size, by job category) to explore workforce needs and potential responses</p> <p>Reach out individually to the region’s largest employers (100+ employees) and institute regular communication about their workforce needs.</p> <p>Work with Career Center staff to improve current database of job vacancies and maximize utilization by both employers and job seekers</p> | <p>Years 2 & 3</p> <p>Survey employers to determine needs, publish annual report</p> <p>Conduct outreach to employers not yet engaged with the GLWIB</p> <p>Upgrade and disseminate orientation packet and other materials for employers about the process for accessing the resources of the workforce system.</p> | <p>Years 4 & 5</p> <p>Survey employers to determine needs, publish annual report</p> <p>Continue and expand employer outreach</p> |
| <p>Resources Needed</p> | <p>WIB and Career Center staff Employer liaisons Database and tech support State funding and support</p> | <p>WIB and Career Center staff Employer liaisons Database and tech support Graphic design and materials production support State funding and support</p> | <p>WIB and Career Center staff Employer liaisons Database and tech support State funding and support</p> |

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| <u>Objective 2.c) Develop and implement greater coordination and collaboration with local economic development entities and municipal governments in order to position the GLWIB as a valuable resource to efforts to locate and expand businesses and employment opportunities in the region.</u> | | <u>Implementation and Outcome Metrics</u> | |
| | | <ul style="list-style-type: none"> • Meet with all municipal governments and economic development entities in the region regularly • Increase GLWIB representation on economic development boards by 1 per year | |
| ACTION STEPS | Year 1 | Years 2 & 3 | Years 4 & 5 |
| | <p>Meet with relevant municipal officials to identify opportunities for collaboration.</p> <p>Place a GLWIB representative on the boards of economic development entities in the region</p> <p>Develop professionally produced materials about the GLWIB and the local workforce that can be used in business expansion and recruitment presentations</p> | <p>Actively participate in economic development discussions and presentations</p> <p>Develop and fund training programs that support specific economic development and business recruitment initiatives.</p> <p>Refine GLWIB materials, and develop packets that target specific industries.</p> | Continue and expand |
| Resources Needed | <p>WIB and Career Center staff</p> <p>Executive Committee</p> <p>Liaisons to municipalities and economic development entities</p> <p>Graphic design and materials production support</p> | <p>WIB and Career Center staff</p> <p>Executive Committee</p> <p>Liaisons to municipalities and economic development entities</p> <p>Graphic design and materials production support</p> | <p>WIB and Career Center staff</p> <p>Executive Committee</p> <p>Liaisons to municipalities and economic development entities</p> <p>Graphic design and materials production support</p> |

Goal #3: To enhance the organizational effectiveness and capacity of the GLWIB to provide leadership in the region, to engage key stakeholders, and to maximize the use of resources to establish and sustain an effective workforce development system.

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| Objective 3.a) Develop and refine a sophisticated marketing, public communication, and branding effort that will promote increased visibility, understanding, and support for the GLWIB and the other components of the region’s workforce development system. | | Implementation and Outcome Metrics | |
| | | <ul style="list-style-type: none"> • Annually updated marketing plan and related tools • 10 presentations annually to business and community groups • Sustain high level of customer satisfaction | |
| ACTION STEPS | Year 1 | Years 2 & 3 | Years 4 & 5 |
| | <p>Convene Strategic Planning Committee to develop and refine a marketing and communications plan.</p> <p>Complete the marketing plan, and implement the necessary training for staff and Board members.</p> <p>Begin implementation.</p> | <p>Refine marketing and informational materials and tools and begin dissemination.</p> <p>Implement media strategy.</p> <p>Upgrade the website for public communication purposes.</p> <p>Develop network of contacts at employers, schools, colleges, community-based organizations through which to conduct coordinated public communication.</p> <p>Implement other activities and events in the marketing plan.</p> <p>Retain marketing consultant(s) as necessary for specific tasks</p> | <p>Continue and expand</p> |
| Resources Needed | <p>WIB and Career Center staff</p> <p>Strategic Planning Committee</p> <p>Graphic design and tech support</p> <p>Funding</p> | <p>WIB and Career Center staff</p> <p>Strategic Planning Committee</p> <p>Graphic design and tech support</p> <p>Funding</p> | <p>WIB and Career Center staff</p> <p>Strategic Planning Committee</p> <p>Graphic design and tech support</p> <p>Funding</p> |

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| <p><u>Objective 3.b) Develop and implement a resource development plan through which the GLWIB can identify and secure increased public (i.e., state, federal, municipal) and private (i.e., foundations, corporations, local employers, individuals) funding to support programs driven by the identified workforce and labor market needs of the region.</u></p> | | <p><u>Implementation and Outcome Metrics</u></p> <ul style="list-style-type: none"> • Annually updated resource development plan • Increase number of grant applications by 3 per year • Maintain # and diversity of funding sources (public and private) • Maintain or increase total GLWIB revenue • Maintain or increase unrestricted GLWIB revenue • Maintain or increase total GLWIB-leveraged dollars accessed by partners | |
| <p>ACTION STEPS</p> | <p>Year 1</p> <p>Review the program directions in the strategic plan and the current GLWIB budget and identify the specific areas needing additional funding.</p> <p>Conduct research about public and private funding sources for which the GLWIB is eligible whose guidelines include potential funding for the GLWIB’s areas of need pipeline</p> <p>Increase the number of grant applications submitted by the WIB for qualified program funding and the number of grant applications submitted by partner organizations or as joint ventures.</p> | <p>Years 2 & 3</p> <p>Continue and expand public and private grant seeking efforts.</p> <p>Explore opportunities and strategies for attracting individual donors (including fundraising events), research successful such efforts from other regions.</p> <p>Research and explore fee-for-service opportunities for the GLWIB.</p> <p>Research and explore opportunities for employer support of GLWIB activities.</p> <p>Pilot other fundraising activities as indicated in the research.</p> | <p>Years 4 & 5</p> <p>Continue and expand grant seeking.</p> <p>Expand implementation of the other fundraising activities based on the experience of the pilots.</p> |
| | <p>Resources Needed</p> <p>WIB staff Executive Committee Full Board Unrestricted administrative funds</p> | <p>WIB staff Executive Committee Full Board Unrestricted administrative funds</p> | <p>WIB staff Executive Committee Full Board Unrestricted administrative funds</p> |

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| <p><u>Objective 3.c)</u> Develop and implement the Board’s structure (including member recruitment and retention; constituent engagement strategies; working committees; orientation and training for members; partnerships with other entities; etc.) to maximize the members’ substantive contributions to the impact and effectiveness of the GLWIB.</p> | | <p><u>Implementation and Outcome Metrics</u></p> <ul style="list-style-type: none"> • Committee structure in place • Increase # of employer representatives active on the Board by 3 per year • Increase # of individuals active in committees by 5 per year • Increase # of partnerships/memberships in business associations in the region by 2 per year | |
| <p>ACTION STEPS</p> | <p>Year 1</p> | <p>Years 2 & 3</p> | <p>Years 4 & 5</p> |
| | <p>Assess the current membership, structures, and operations of the Board and identify areas needing improvement.</p> <p>Meet with the Chief Elected Official to discuss the composition of the Board, develop plans for future recruitment, and specify a process for rotating off inactive members.</p> <p>Refine the Board committee structure, and recruit members onto the committees.</p> <p>Develop and implement a succession plan for Board leadership, membership, and staff</p> | <p>Continue efforts to improve Board composition, structure, and operations.</p> <p>Implement special campaign to expand employer involvement in the Board and its committees</p> <p>Update and expand the Board orientation manual and materials.</p> <p>Identify organizations and institutions with which to develop formal linkages, and assign Board and staff members to serve as liaisons.</p> <p>Continue implementation of Board succession plan</p> | <p>Continue efforts to improve Board composition, structure, and operations.</p> |
| <p>Resources Needed</p> | <p>WIB staff Executive Committee</p> | <p>WIB staff Executive Committee</p> | <p>WIB staff Executive Committee</p> |

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| Objective 3.d) Develop and implement a process for tracking, documenting, and analyzing short- and longer-term customer outcomes, and routinely use that analysis to drive workforce development policies and priorities in the region. | | <u>Implementation and Outcome Metrics</u> | |
| | | <ul style="list-style-type: none"> • Process in place • Annual report of outcomes • Annually updated Business Plan based on outcome assessment | |
| ACTION STEPS | Year 1 | Years 2 & 3 | Years 4 & 5 |
| | <p>Establish baseline data for all the identified implementation and outcome metrics related to the goals and objectives in the strategic plan.</p> <p>Assess implementation of the strategic plan</p> <p>Develop process and related materials and database for gathering and compiling customer tracking data.</p> <p>Field test the process, and refine on the basis of the test.</p> <p>Continue implementation, generate Year 1 data report</p> | <p>Continue to refine the process and the database.</p> <p>Assess implementation of the strategic plan annually.</p> <p>Generate annual reports.</p> | <p>Continue to refine the process and the database.</p> <p>Assess implementation of the strategic plan annually.</p> <p>Generate annual reports.</p> |
| Resources Needed | <p>WIB and Career Center staff</p> <p>Executive Committee</p> <p>Workforce Issues Committee</p> <p>Database and tech support</p> <p>State funding and support</p> | <p>WIB and Career Center staff</p> <p>Workforce Issues Committee</p> <p>Database and tech support</p> <p>State funding and support</p> | <p>WIB and Career Center staff</p> <p>Workforce Issues Committee</p> <p>Database and tech support</p> <p>State funding and support</p> |

Appendix A

GLWIB Strategy Scorecard

The following “Strategy Scorecard” includes all the implementation and outcome metrics for the strategic goals and objectives in the strategic plan, and is a tool by which the GLWIB will assess its effectiveness over the 5-year period covered by the plan. It will be completed annually, with an accompanying narrative, and presented to the Board as a report on the GLWIB’s progress achieving the goals in the strategic plan. The initial year (2009-2010) will be used to establish a baseline for the complete range of indicated in the scorecard.

| Implementation & Outcome Metrics | 2009 - 2010 | 2010 - 2011 | 2011 - 2012 | 2012 - 2013 | 2013 - 2014 |
|--|----------------|----------------|----------------|----------------|----------------|
| Objective 1.a) Convene, coordinate, and align the efforts of skills training and career services providers in the region to ensure the maximum impact of existing resources and maximum access to services for all individuals who live or work in Greater Lowell. | | | | | |
| Annual convened meeting of providers | | | | | |
| Meet or exceed Business Plan targets for # of individuals receiving workforce services | | | | | |
| Corrective action plans for identified gaps in service | | | | | |
| Objective 1.b) Collaborate with school systems, vocational high schools, postsecondary institutions, and community-based youth-serving agencies to develop and implement workforce initiatives that create a reliable youth pipeline that will prepare students for high skill, high wage jobs and careers. | | | | | |
| Meet or exceed Business Plan targets for # of workforce programs in schools and colleges | | | | | |
| Meet or exceed Business Plan targets for # of students and out-of-school youth participating in programs | | | | | |
| Sufficient funding for school-based programs as per Business plan | | | | | |
| Meet or exceed Business Plan targets for # of youth receiving relevant credentials (diploma, GED, Associates degree, or certificate) | | | | | |
| 2 to 3 new Youth Council members per year (with a focus on employers and representation from all towns) | | | | | |

| Implementation & Outcome Metrics | 2009 - 2010 | 2010 - 2011 | 2011 - 2012 | 2012 - 2013 | 2013 - 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Objective 1.c) Develop and implement culturally competent workforce initiatives specifically targeting selected populations of workers and job seekers such as youth, immigrants, older workers, disabled workers, veterans, TANF families, and others, including educating employers about working effectively with the identified populations. | | | | | |
| Meet or exceed Business Plan targets for # of individuals in the target groups participating in programs | | | | | |
| Increase collaboration with 2 to 3 new community agencies per year | | | | | |
| Meet or exceed Business Plan targets for # of placement-ready individuals in youth pipeline | | | | | |
| Objective 1.d) Collaborate with employers (large and small), industry associations, and labor unions to provide opportunities for work-based job training, apprenticeships, and internships that support access to industry-specific credentials and licenses. | | | | | |
| Meet or exceed employer targets for # of individuals participating in work-based programs | | | | | |
| Increase # of employers sponsoring programs by 1 or 2 per year | | | | | |
| Objective 2.a) Develop and implement innovative and market-driven workforce initiatives that target the needs of critical industries in the region (such as manufacturing and health care), as well as the needs of new and emerging industries focused on green jobs, alternative energy, biotech, life sciences, and medical devices. | | | | | |
| Increase # of sectoral initiatives by 1 per year | | | | | |
| Increase # of initiatives in emerging industries by 4 over the course of the plan | | | | | |
| Sufficient funding for sectoral initiatives | | | | | |
| Increase # of employer and other partners by 2 to 3 per year | | | | | |
| Meet or exceed # of job placements in the plans for each of the sectoral initiatives | | | | | |

| Implementation & Outcome Metrics | 2009 - 2010 | 2010 - 2011 | 2011 - 2012 | 2012 - 2013 | 2013 - 2014 |
|--|--------------------|--------------------|--------------------|--------------------|--------------------|
| <u>Objective 2.b)</u> Develop and implement processes for ongoing communication and collaboration with employers (large and small) that ensure a current and in-depth understanding of their workforce needs and challenges, and that support the GLWIB's rapid response capability with respect to the changing needs of employers. | | | | | |
| Perform annual employer survey | | | | | |
| Increase # of employers participating in needs assessment process by 10% per year | | | | | |
| Develop and disseminate updated annual report of employer needs | | | | | |
| <u>Objective 2.c)</u> Develop and implement greater coordination and collaboration with local economic development entities and municipal governments in order to position the GLWIB as a valuable resource to efforts to locate and expand businesses and employment opportunities in the region. | | | | | |
| Meet with all municipal governments and economic development entities in the region regularly | | | | | |
| Increase GLWIB representation on economic development boards by 1 per year | | | | | |
| <u>Objective 3.a)</u> Develop a sophisticated marketing, public communication, and branding effort that will promote increased visibility, understanding, and support for the GLWIB and the other components of the region's workforce development system. | | | | | |
| Annually updated marketing plan and related tools | | | | | |
| 10 presentations annually to business and community groups | | | | | |
| Sustain high level of customer satisfaction | | | | | |
| <u>Objective 3.b)</u> Develop and implement a resource development plan through which the GLWIB can identify and secure increased public (i.e., state, federal, municipal) and private (i.e., foundations, corporations, local employers, individuals) funding to support programs driven by the identified workforce and labor market needs of the region. | | | | | |
| Annually updated resource development plan | | | | | |
| Increase number of grant applications by 3 per year | | | | | |

| Implementation & Outcome Metrics | 2009 - 2010 | 2010 - 2011 | 2011 - 2012 | 2012 - 2013 | 2013 - 2014 |
|--|--------------------|--------------------|--------------------|--------------------|--------------------|
| Maintain # and diversity of funding sources (public and private) | | | | | |
| Maintain or increase total GLWIB revenue | | | | | |
| Maintain or increase total unrestricted GLWIB revenue | | | | | |
| Maintain or increase total GLWIB-leveraged dollars accessed by partners | | | | | |
| Objective 3.c) Develop and implement the Board’s structure (including member recruitment and retention; constituent engagement strategies; working committees; orientation and training for members; partnerships with other entities; etc.) to maximize the members’ substantive contributions to the impact and effectiveness of the GLWIB. | | | | | |
| Committee structure in place | | | | | |
| Increase # of employer representatives active on the Board by 3 per year | | | | | |
| Increase # of individuals active in committees by 5 per year | | | | | |
| Increase # of partnerships/memberships in business associations in the region by 2 per year | | | | | |
| Objective 3.d) Develop and implement a process for tracking, documenting, and analyzing short- and longer-term customer outcomes, and routinely use that analysis to drive workforce development policies and priorities in the region. | | | | | |
| Process in place | | | | | |
| Annual report of outcomes | | | | | |
| Annually updated business plan based on outcome assessment | | | | | |