

N Developing a Community Vision

A Case Study of The Charlotte-Mecklenburg
Workforce Board and its Five-Year Strategic Plan

A

W

B

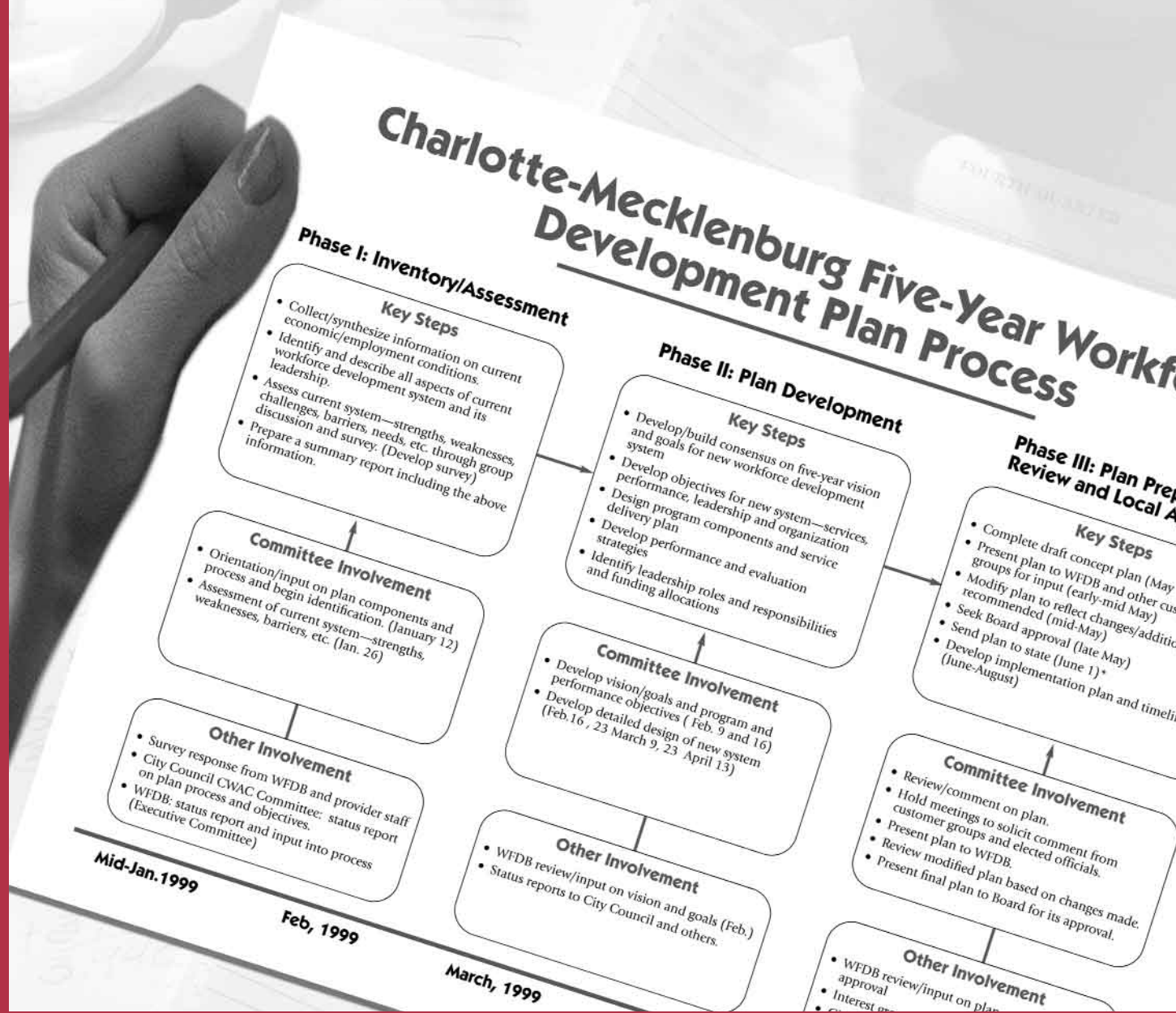
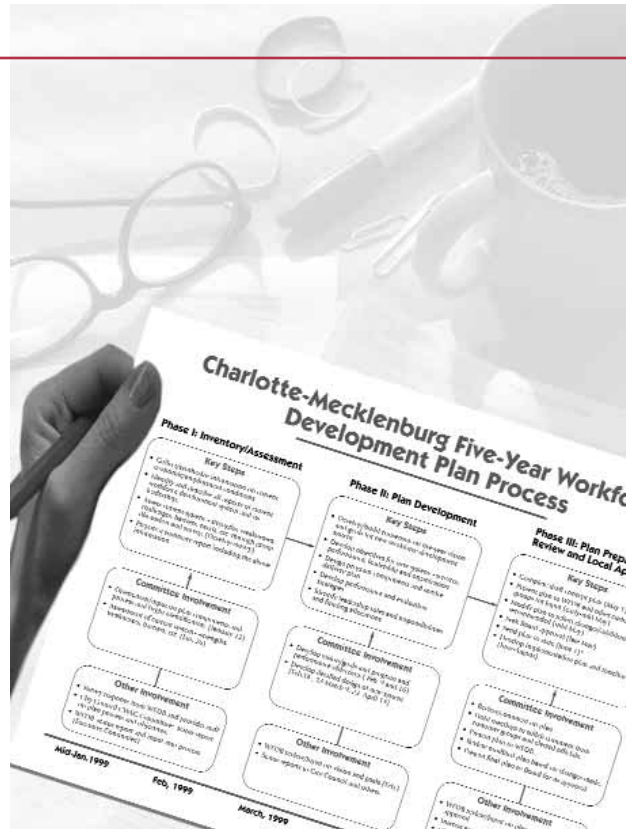


Table of Contents

Introduction	3
The Evolution of the Charlotte-Mecklenburg Board and its Work	5
1982 to mid-1990s	
Mid-1990s to 1999	
Developing the Five-Year Strategic Plan	9
The “Plan to Plan”	
The Process Begins	
Focus on Operations	
Broadening the Focus	
Formal Review and Approval of the Plan	
The Completed Plan	
Organizing the Board to Carry out the Plan	17
Board Committee Structure Changed to Align with Plan Goals	
Staff Roles and Accountability	
Funding the Board’s Work	
Building Support in the Community	
Lessons Learned	21
Preparing the Board	
Developing the Plan	
Implementing the Plan	
The Future	
Charlotte-Mecklenburg Five-Year Plan Executive Summary	A1

Introduction

Preparing a strategic plan is one of the most important functions of a Workforce Investment Board (WIB). The Workforce Investment Act of 1998 (WIA) devotes an entire section to instructing local WIBs on how to prepare a “comprehensive five-year local plan” that explains in detail how they will carry out the responsibilities given to them by the Act. But if this information is all that local boards include in their strategic plans, they will be missing a great opportunity.



In the past, Private Industry Councils (PICs) primarily supervised the operations of federally-funded employment and training programs. Under WIA, these PICs are expected to transform themselves into governance boards with a mandate to examine a broad range of community economic and workforce development issues, identify common problems and create solutions based on a consensus of many local interests and stakeholders. Whereas PICs provided *oversight*, the new WIBs are expected to provide *leadership*, and this new role demands a new kind of plan—far more “comprehensive” and locally specific than the document required by Section 118 of WIA. A strategic plan should be a road map for the board itself, which is the plan’s most important audience. It should help the board clarify its mission, its work and its available resources; it should assign specific responsibility among the board members and other stakeholders for carrying out the board’s work; and it should provide for measurements and feedback to the board on the progress of that work.

General Eisenhower is reputed to have said about the preparations for the D-day invasion, “The actual plan was secondary. It was the *planning process* which ensured our success.” This paper is about the planning process as it relates to workforce boards and how the discipline of writing a plan can help board members understand and react to the so-called “big-picture” issues in their local economies.

This paper describes the steps that the workforce board of Charlotte-Mecklenburg, North Carolina, has taken to make the transition from its traditional and somewhat limited role of programmatic oversight into a much broader and influential policy development, advocacy and systems planning arena. It discusses the evolution of the Charlotte-Mecklenburg Private Industry Council into the workforce board in place today. It provides an overview of the

development and approval of the board's five-year strategic plan and it explains how the board has organized itself to implement the plan's "big picture" policies.

This paper was written by Carol Morris, a Charlotte-based planning consultant who facilitated the board's planning process and prepared the board's five-year plan in 1999. Ms. Morris was assisted by Gus Psomadakis, who recently retired from his position as the Executive Director of Charlotte-Mecklenburg's Board after many years of service.

A copy of the executive summary of Charlotte-Mecklenburg's strategic plan is attached. More information about the plan and its creation can be obtained at Charlotte-Mecklenburg's web site at www.charlotteworks.org or by contacting Mr. Kirk Grosch, Charlotte-Mecklenburg Workforce Development Board, phone (704) 336-3951, fax (704) 336-7259.

This is one of a series of publications prepared by the National Association of Workforce Boards (NAWB) to provide guidance, technical assistance and advice to the members and staffs of workforce investment boards on topics of importance to their successful governance of the nation's new workforce development system.

NAWB is a member of the Business Coalition for Workforce Development, a group of 35 national business organizations helping employers set up effective training and employment systems under the federal Workforce Investment Act. The Coalition is funded by grants from the US Department of Labor. Opinions stated in this document do not necessarily represent the official policy of USDOL.

The Evolution of the Charlotte-Mecklenburg Board and Its Work

Charlotte is the largest city in North Carolina. Together with surrounding Mecklenburg County it has a population just under 650,000. The decade of the 1990s saw significant population growth of over 20 percent and the creation of over 65,000 new jobs in one of the South's most booming economies.

Partly in response to this phenomenal growth, Charlotte-Mecklenburg's Workforce Development Board (WDB) has been positioning itself over the last several years to become a much more visible and influential change agent for workforce development in its community. The board realized that for it to be a true leader in bringing about changes in the local workforce—changes that will help Charlotte remain economically competitive—it needed to take on a much larger role than that of program oversight. Having effective programs is important, but in and of themselves, good programs could not address the problems or exploit the opportunities facing Charlotte's rapidly changing labor market. A new approach was needed that looked at the area's entire workforce development *system*.

1982 to mid-1990s

After Congress passed the Job Training Partnership Act (JTPA) in 1982, the Charlotte-Mecklenburg Private Industry Council was formed as a result of a consortium agreement between the City of Charlotte and surrounding Mecklenburg County. This agreement defined the size and membership requirements for the new council as well as its governing role and responsibilities. Representatives from both the private and public sectors comprised the PIC's membership, with the private sector having a two-seat majority. As with other PICs across the country, the main role of the council was management and oversight of the local JTPA program for which the City of Charlotte was the designated administrative entity and grant recipient. Most of the work of the PIC dealt with funding approvals and operational issues for the JTPA program. This continued until the early 1990s when discussions about creating a system of consolidated one-stop job centers prompted the board to begin broadening its views about workforce development and the board's most useful role in the local labor market.

During the early 1990s, much discussion was taking place among academics, policy-makers and local practitioners about the need to reform and restructure the nation's public employment and training system. In Charlotte-Mecklenburg, a local "innovators" group was formed under the leadership of the PIC in April, 1994. This group consisted of staff from the JTPA Program, the Employment Security Commission and the Department of Social Services, and it soon expanded to include representatives from the North Carolina Department

1982

PIC created under JTPA

April 1994

Discussions about creating a one-stop system

of Vocational Rehabilitation, Central Piedmont Community College (CPCC), the Charlotte Chamber of Commerce and community based organizations such as the Charlotte Area Fund (a community action agency) and the Urban League of Central Carolinas. The group began exploring the possibilities of consolidating local workforce development programs at “one-stop” service centers in response to a recently-initiated special federal grant program.

Because of this group’s work, Charlotte received a \$300,000 grant to establish its first one-stop *JobLink Center* in early 1996. The PIC and its chair were personally involved in the discussions and planning that took place around this issue. In fact, several PIC members joined agency representatives on visits to Louisville and Indianapolis where one-stop systems were already in operation. These trips inspired the group and enthusiasm for dramatic local change began building on the council.

On January 1, 1996, the State of North Carolina, acting through a governor’s executive order, created local workforce boards by reconfiguring its existing PICs and expanding their responsibilities and authority over a broad range of workforce development programs and issues. At the time, it was anticipated that similar legislation at the federal level would soon follow, although in fact the federal Workforce Investment Act was not passed for another two and one-half years.

But Charlotte-Mecklenburg’s new workforce board quickly embraced its new role, increasing its membership to include 13 private sector and 11 public sector representatives and forming a number of working committees to plan for the future. The board was careful to appoint both board members and non-members to these groups in a successful effort to increase the involvement of local business and community leaders in the expanded work of the board.

January 1996

PIC officially becomes a Workforce Board

1996–97

Board becomes more visible and proactive in the community

Job Needs and Skill Study completed

Workforce development summit held

Mid-1990s to 1999

In a continuing effort to increase its visibility and influence, Johnsie Beck, the Chair of the new workforce board and a local human resource executive, and Gus Psomadakis, the board’s executive director (and former PIC director), pursued opportunities to attract new members who had high positions and influence in the community. Prospective members are often appointed to board subcommittees and ad-hoc task forces so they can get a feel for the work of the board before being offered full membership. And a deliberate effort has been made to ensure that board members represent all the important sectors of the local economy—banking, wholesale/retail trade, construction, utilities and manufacturing.

In addition to elevating the level of its members, the board became more visible in the community in 1996 as a result of a series of presentations made by the board’s chair and vice-chair to elected officials and business groups. These presentations highlighted the work of the board, which was now beginning to focus on the creation of the local one-stop system envisioned in the governor’s executive order and for which the board had recently received special funding. This outreach was especially important in building partnerships among the various programs which were to be housed at the area’s first one-stop *JobLink Center* located in Uptown Charlotte.

The board joined with the Charlotte Chamber of Commerce to sponsor a *Job Needs and Skills Study* in 1996. This study, prepared by the Urban Institute at the University of North Carolina at Charlotte (UNCC), was based on a survey of area employers' perceptions of the preparedness and skill levels of the local workforce. It was an important piece of work that drew attention to gaps in the current job training delivery system. At the conclusion of the study, a workforce development "summit" was held to share findings from the study with the business and education communities and to engage them in discussion of changes needed. These efforts with the business community created increased exposure and prestige for the board.

In 1997 Chris Rolfe, Vice President of Corporate Human Resources for Duke Energy Corporation, moved from vice-chair to chair of the board. Rolf was an expert in the planning and management of complex systems. One of his top priorities was to have the board take leadership in establishing greater accountability throughout the entire local workforce delivery system. In talking with key business and community leaders, he confirmed what he already suspected—that no one had a *clear* and *comprehensive* picture of the level and types of resources being devoted to workforce development in Charlotte, nor of the results of these efforts.

As a result of his findings, the chair directed that each of the partners involved in the emerging one-stop center submit its annual business plan to the board for review. Requested information included: 1) local, state and federal funding received by the organization or agency, 2) programs and services offered, 3) number of people served and 4) outcomes such as number of job placements. This was the first time all this information had come together in one place. It was the beginning of a process that has led to greater information sharing and accountability throughout the entire local workforce development system. Business plans were received from the following agencies:

- City of Charlotte JTPA Program
- Department of Social Services Work First Program
- Employment Security Commission
- North Carolina Department of Vocational Rehabilitation
- Central Piedmont Community College
- Charlotte-Mecklenburg Schools (CMS)

Also important to increasing the effectiveness of the board were the focused annual retreats it held each year in June, facilitated by an outside consultant. At the retreat in 1997, the consultant developed a formal organization chart to help the board carry out the new responsibilities given it by the governor's order the previous year. This was an important milestone in the evolution of the board. The organization chart established lines of accountability and formalized the board's subcommittees based on the work plans that came out of the retreat. At this time the board also established a new, quasi-independent committee—consisting of board members and agency heads—called the *JobLink Management Operations Team* which would oversee the day-to-day operations of the one-stop JobLink Centers, freeing the board to concentrate its attention on "big-picture" policy issues.

1997

Board begins to focus on the accountability of the service delivery system

Spring 1997

Business plans of one-stop partners submitted to Board

June 1997

Board's first organizational chart approved at 1997 retreat

**September
1997**

*First JobLink
Center opens in
Uptown Charlotte*

In September 1997, Charlotte's first one-stop JobLink Center opened as part of a local office of the State Employment Security Commission. The board had been closely involved in developing the memoranda of understanding among the various JobLink partners and with other activities related to the center's opening. Many management issues had to be resolved such as the lines of supervision, staffing of the center and funding. At times it was a real struggle. While the JobLink Management and Operations Team ultimately worked out the problems and conflicts, the board played a key role in helping to foster a spirit of cooperation among the partners. It was this spirit of cooperation that allowed the center to open with multiple partners involved and enthusiastic.

June 1998

*Need for a
strategic plan
identified at
annual retreat*

So successful was this first center that at its next annual retreat in 1998, the board voted to pursue development of four additional JobLink Centers over a five-year period. Chairman Rolfe continued to stress to the board that its role was not to resolve operational issues related to the JobLink system, but rather to deal with policy issues, and if needed, help arbitrate conflicts that may arise. As the agenda setter for board meetings, he was very careful to ensure that the board meetings focused on policy, and left the day-to-day management issues with the JobLink management team.

Fall 1998

*Planning
Committee
formed to
develop a
strategic policy
plan for
workforce
development*

Among other work items discussed at the 1998 retreat was the need to develop a strategic workforce development plan, and this emerged as one of the board's top priorities for the coming year. The need for a such a plan surfaced initially in response to the anticipated federal workforce legislation—now finally wending its way through Congress—that was expected to require boards to submit five-year plans for their one-stop systems. But it also stemmed from a conviction, particularly held by the board chair and executive committee, that local "big picture" workforce issues such as illiteracy, transportation and child care—issues beyond the scope of the workforce investment legislation—needed to be dealt with in a comprehensive, strategic way. The board needed a plan that would help define and guide its mission and its work—all its work—for the next five years. And it was clear that this plan should focus on policy and not deal with the nitty gritty operational issues of the workforce delivery system.

After the board's decision to create a strategic plan—the first of its kind for the organization—it formed a 20-member planning committee to develop the plan and to oversee on-going planning activities for the board once the initial plan was completed. The committee was carefully selected to ensure good representation and buy-in of the various stakeholders in the community. Its membership consisted not only of current board members but also key managers of service-provider agencies including the Charlotte-Mecklenburg Schools, Central Piedmont Community College, the County Department of Social Services, the Employment Security Commission, the City of Charlotte, the North Carolina Department of Vocational Rehabilitation, the Charlotte Housing Authority and the Charlotte-Mecklenburg Library. It also included representatives from community-based non-profit organizations such as Goodwill Industries, the Charlotte Area Fund and the Urban League of Central Carolinas. Four private sector board members were appointed to ensure local business input, one of whom served as the committee's chair. A twenty-member committee seems large, but the inclusiveness of this group insured the latter wide-spread acceptance of the plan by community stakeholders.

Developing the Five-Year Strategic Plan

The “Plan to Plan”

After the planning committee was formed, the workforce board was ready to begin the process of developing its plan. However, several issues had to be resolved first: 1) who was going to develop the plan, and 2) who was going to fund it. Recognizing that effective planning processes take time, the board set a goal to have the plan completed and approved by its June 1999 retreat.

It was clear that the board’s small staff did not have the time or expertise to take on the project alone. In addition, the board concluded that a neutral facilitator/planner would be more effective in conducting the process than someone closely associated with the local workforce system. This would in turn lead to greater buy-in and acceptance of the plan by all the public, private and non-profit organizations involved in the system. Consequently, in early December 1998, the board staff director approached Carol Morris, a local planning consultant to see if she would be interested in the project. Morris, who had facilitated numerous strategic planning efforts in the community, had worked with the board in preparing its successful one-stop center grant application in 1995. She had also worked with the local school system to develop grant applications for various school-to-work initiatives and had led a strategic planning effort for a new community-based employment and training program for low income residents. Morris was then asked to prepare a scope of services and cost estimate. She submitted this information in mid-December, 1998.

At the same time, the board’s executive director had been talking with the director of Charlotte’s Neighborhood Development Department about the City’s funding the development of the plan. As the administrative entity for Charlotte-Mecklenburg’s federal JTPA Program, the City of Charlotte had direct fiscal responsibility for implementing its employment and training activities. In addition, the city traditionally contributed over \$1 million annually from city general funds to supplement the JTPA funding for workforce development programs. Being very supportive of workforce development activities, the City of Charlotte agreed to earmark \$45,000 of this \$1 million to cover the expenses of preparing the board’s new strategic plan.

Once the above logistics were settled, the work got underway. Morris prepared an outline of a generalized planning process and schedule along with a summary of the roles and responsibilities of the participants in the process, including those of the consultant, the staff, the planning committee and the board. *Two charts describing the planning process and the roles of the various parties are shown on pages 10 & 11.*

December 1998

Planning consultant contacted to prepare a scope of services and cost estimate to facilitate the planning process and prepare the plan

January 1999

City of Charlotte agrees to fund the project, and contract with consultant signed

Planning process, timeframe and roles and responsibilities developed and endorsed

Charlotte-Mecklenburg Five-Year Workforce Development Plan Process

Phase I: Inventory/Assessment

Key Steps

- Collect/synthesize information on current economic/employment conditions.
- Identify and describe all aspects of current workforce development system and its leadership.
- Assess current system—strengths, weaknesses, challenges, barriers, needs, etc. through group discussion and survey. (Develop survey)
- Prepare a summary report including the above information.

Committee Involvement

- Orientation/input on plan components and process and begin identification. (January 12)
- Assessment of current system—strengths, weaknesses, barriers, etc. (Jan. 26)

Other Involvement

- Survey response from WFDB and provider staff
- City Council CWAC Committee: status report on plan process and objectives.
- WFDB: status report and input into process (Executive Committee)

Phase II: Plan Development

Key Steps

- Develop/build consensus on five-year vision and goals for new workforce development system
- Develop objectives for new system—services, performance, leadership and organization
- Design program components and service delivery plan
- Develop performance and evaluation strategies
- Identify leadership roles and responsibilities and funding allocations

Committee Involvement

- Develop vision/goals and program and performance objectives (Feb. 9 and 16)
- Develop detailed design of new system (Feb.16, 23 March 9, 23 April 13)

Other Involvement

- WFDB review/input on vision and goals (Feb.)
- Status reports to City Council and others.

Phase III: Plan Preparation, Review and Local Approval

Key Steps

- Complete draft concept plan (May 1)
- Present plan to WFDB and other customer groups for input (early-mid May)
- Modify plan to reflect changes/additions recommended (mid-May)
- Seek Board approval (late May)
- Send plan to state (June 1) *
- Develop implementation plan and timeline (June-August)

Committee Involvement

- Review/comment on plan.
- Hold meetings to solicit comment from customer groups and elected officials.
- Present plan to WFDB.
- Review modified plan based on changes made.
- Present final plan to Board for its approval.

Other Involvement

- WFDB review/input on plan and final approval
- Interest group meetings
- City Council presentation/input

Charlotte-Mecklenburg Workforce Development Plan

Key Roles and Responsibilities in Plan Development

Carol Morris, Consultant	WFDB Staff	WFDB Planning Committee	WFDB
<p>Primary Role: Facilitate the process and develop and prepare the plan with input from staff, the WFDB Planning Committee and other groups.</p> <p>Key Responsibilities:</p> <ul style="list-style-type: none"> • Design planning process • Facilitate tasks to complete inventory and assessment of current system and prepare summary report • Facilitate planning sessions with the WFDB Planning Committee, Youth Council and others, providing concepts, recommendations and strategies for the committee(s) to review and build on at meetings • Prepare status reports on the project to send to Board, staff and others • Write a draft plan and revise according to input given • Develop a presentation of the plan recommendations to give to the WFDB, elected officials and others • Co-facilitate the review and adoption stage of the process 	<p>Primary Role: Provide administrative and technical support to the consultant throughout the process and participate on the WFDB Planning Committee.</p> <p>Key Responsibilities:</p> <ul style="list-style-type: none"> • Provide information relative to the State and National WFDB Investment Act and plan requirements • Prepare agenda packets and summary minutes for committee meetings • Provide information on integrated systems used elsewhere across the country and other technical information needed throughout the process • Schedule meetings with City staff, Board Chair and others throughout the process • Co-facilitate the review and adoption stage of the process 	<p>Primary Role: Provide input at Committee meetings and come to consensus on a draft concept plan to present to the WFDB and others.</p> <p>Key Responsibilities:</p> <ul style="list-style-type: none"> • Review material in agenda packets, attend Committee meetings and provide input throughout the process • Review reports and drafts of plan presented by consultant • Approve draft plan to present to WFDB and others • Co-facilitate discussion of the draft plan with WFDB and others. (Chairman most actively involved.) 	<p>Primary Role: Review and approve final plan to send to the state.</p> <p>Key Responsibilities:</p> <ul style="list-style-type: none"> • Provide input into the process as project status reports are given at Board meetings throughout the process • Read and review plan, providing recommendations for changes • Be advocates for the plan and participate in its presentation to elected officials and others to whom the plan will be presented during its public review stage (Chairman most actively involved.) • Adopt the final plan to send to the state

The Process Begins

**January–
February 1999**

*Planning
Committee begins
meeting regularly*

*Key issues, gaps
and needs are
identified*

*Youth Council
formed and
begins meeting to
give input into
youth component
of five-year plan*

The planning committee held its first official meeting in mid-January, 1999. The purpose of this first “orientation” meeting was to review the process, time frame and expectations for the plan and ask the committee to give feedback and verify its very ambitious schedule over the coming months. The group was asked to meet several times a month for 2–3 hour sessions in order to meet its tight deadline of completing a draft plan by May, 1999. After the planning committee signed off on the process and schedule, the consultant presented the process, time frame and expectations to the executive committee and then to the full board for its information and approval. Regular updates and progress reports were given to the board throughout the entire process.

In late January, the committee began the process of developing the plan. Identifying the strengths, gaps and needs of the existing workforce development system was the first order of business. One and a half meetings were devoted to this task, as it was important to get all the issues and concerns out on the table. It was also a way for the committee members to share information and in some cases, educate each other on what was going on in the current system. When all points were made, the issues were categorized under the following preliminary headings:

- Communication and marketing
- Delivery of services to special populations (internationals, seniors, youth, learning and physically disabled, etc.)
- Coordination/duplication of services
- Training services for jobseekers
- Services for employers
- Technology and information
- Capacity and training of service providers

At this same time, the board created a youth council as was required by WIA, consisting of a broad cross-section of stakeholders involved with youth education and workforce issues. Like the planning committee, the youth council was asked to identify issues, gaps and needs of the current delivery system for youth services. It generally followed the same agenda as the planning committee throughout the process and its recommendations were integrated into the board’s overall plan.

**February–
April 1999**

*Preliminary plan
vision, goals,
objectives and
strategies
developed*

When the planning committee and youth council had completed their discussions of issues, gaps and needs, the next step was for both groups to brainstorm their visions, goals and objectives for the plan. The youth council focused only on those topics that addressed youth issues. Because several youth council members were also on the planning committee, cross-communication and coordination was easily achieved.

Focus on Operations

Initially the planning committee focused on the delivery of services through the one-stop JobLink centers. Considerable time was spent articulating nine major “goal areas” and specific strategies for accomplishing each one. The nine areas related to one-stop services were:

- Defining the Board’s leadership role
- System Management and Performance
- Building Strong Partnerships in the Community
- Establishing JobLink Centers
- Providing Adult Education and Training
- Employer Services and Involvement
- Youth Education, Training and Employment
- Marketing and Outreach
- Technology and Information

The committee created an organizational framework for the JobLink system that consisted of three levels of responsibility and activity: 1) policy direction, oversight and planning would be the responsibility of the board, its committees and its staff; 2) system oversight and management would be the responsibility of the JobLink Management Operations Team; and 3) actual service delivery would be the responsibility of the operators of each of the JobLink constituent programs and agencies. The committee created a new position, *chief operating officer*, whose key role would be to provide operations support, coordination and ensure accountability throughout the one-stop system. The chief operating officer would report to the JobLink Management Team which in turn reported to the board.

All the above was written in a format that simply listed the goals, objectives and strategies, without any descriptive narrative. This was the first cut at getting at the core of the plan’s focus.

Broadening the Focus

It was now time to check in with Chairman Rolfe on the progress of the committee and its work. A three-hour session was held in late April with the chair, executive director and consultant. It was decided that the direction the plan was heading in was too focused on WIA issues—it was too operational. Its scope needed to be broadened to look at workforce issues in a more “global” and policy-oriented way. The meeting also helped clarify the idea that the plan being developed would likely *not* be the plan Charlotte-Mecklenburg would submit to the state as required under the WIA legislation, although portions of it could be used for that purpose. This new plan was something broader and more policy-oriented than anything the board had produced before. It would go far beyond WIA and the delivery of WIA services.

Chairman Rolfe suggested that the vision, goals and objectives formulated thus far be distilled down to four or five major goals that would become the core of the work of the board

Mid-April 1999
*Draft
organizational
framework for the
JobLink system
created*

Late April 1999
*Board Chair gives
his input on work
to date*

over the next five years. He also stressed his desire to make sure the plan clearly identified who would be accountable for carrying out the plan's work.

Following this meeting, the original nine service-delivery goals were reduced to five broad "strategic objectives":

- Implement the WIA legislation;
- Reduce illiteracy;
- Assess and monitor the "state of the local workforce";
- Increase accountability for workforce development in the community;
- Increase community-wide awareness of and support for workforce development.

Early May 1999

First rough draft prepared and reviewed by Planning Committee

The consultant then developed a rough draft of the plan—dated May 11, 1999—that was based on these five objectives. Many of the service delivery goals that had previously been identified by the committee now became sub-parts of the WIA implementation strategy. They fell into six areas:

- JobLink Centers and Affiliate Sites
- Employment and Training Services for Adults and Youth
- Employer Services and Expectations
- System Oversight, Coordination and Accountability
- System Visibility and Community Support
- Continuous Improvement

The May 11th draft was presented to the planning committee which made only minor changes, but suggested that the "Reduce Illiteracy" objective be expanded to include other barriers to employment such as discrimination or the lack of child care, public transportation or affordable housing. These barriers can also keep people out of the workforce, even if they have the skills necessary to succeed. The group also wanted the JobLink organizational framework to be revised. A special meeting was scheduled between key managers in the local delivery system (who were all members of the planning committee), the board's executive director and the consultant to refine the organization chart based on the committee's comments.

Mid-May 1999

Executive Committee reviews draft and gives feedback

The next step was to present the draft plan to the board's executive committee which consists of the chairpersons of each of the board's subcommittees, including the chair of the planning committee. This took place in mid-May. The executive committee felt the plan was on target and suggested a few minor changes. After receiving this feedback, the planning committee met one more time to review and discuss any final changes to the draft, particularly those relating to expansion of the goals relating to barriers to employment.

On May 28, the second full draft of the plan was completed by the consultant, incorporating changes the committees had proposed. In this draft of the plan, the priority strategic goals were narrowed to four areas:

- Implement WIA;
- Focus community attention and resources on minimizing barriers to employment;
- Increase accountability in assuring that workforce development is effective and relevant;
- Expand community-wide awareness and support of workforce development policies and initiatives.

Objectives, strategies and implementation responsibilities were included for each of the goal areas. This draft was sent to the chair and the executive committee for their review.

In the first week of June, Chairman Rolfe met with the executive director and the consultant to give his final comments and to prepare for the executive committee meeting scheduled the following week. The executive committee's review resulted in minor changes to the draft. A few days later, the third draft incorporating all the recommended changes was complete and sent to the full board to review in advance of its annual retreat on June 22.

Formal Review and Approval of the Plan

On June 22, the board held its annual retreat. Nineteen of the 24 board members attended. Four and one-half hours of this day-long session were devoted to review and discussion of the draft five-year plan. As in previous years, an outside facilitator was hired to help conduct the meeting. The board reviewed the plan page by page and had a very in-depth discussion about it, with participation from all board members.

Overall, the plan was well received. Few substantive changes were recommended. However, one issue surfaced, calling for a significant addition to the plan. The concern was voiced that the plan did not place enough emphasis on the retraining of the workforce. This led to a discussion about the concept of life-long learning, which not only includes continuous retraining of adults, but school-to-work efforts as well. While addressed in the draft plan, life-long learning had not been identified as a priority goal and the full board believed that it should be. Therefore, the consultant was given the directive to add life-long learning as a fifth major goal and to develop objectives and strategies relating to it.

The process that had consumed the previous six months was nearing completion. The consultant made final revisions which were sent to the board for its review. Considering the changes from the previous draft, the board unanimously approved the plan on July 15, 1999. The board now had a clear picture of what its work would be focused on for the next five years, work which would go well beyond its previous scope of program operational oversight and move the board into a role of leadership and advocacy.

The Completed Plan

According to the board's new plan, its future work will be carried out in the following areas:

- **Workforce Investment Act Implementation:** The board will work to insure that its vision for a coordinated JobLink system is implemented and that the various one-stop cen-

Early June 1999

Second draft completed

Chair and Executive Committee review draft

Third draft plan completed and sent to full Board to review in advance of annual retreat

Late June 1999

Board reviews draft at annual retreat

Mid-July 1999

Board approves final plan

ters provide high-quality workforce development services to both jobseekers and employers. The board will lead efforts to promote the JobLink system and will seek support and cooperation from civic, business and non-profit leaders in the community. It will also take an active role in providing input into state and federal legislation and other actions that will impact the JobLink system and its operation in the long-run.

- **Promotion of Life-long Learning:** The board will assume a leadership role in advocating for life-long learning and stressing the impact it has on building a quality workforce. The board will encourage both public and private sectors to commit sufficient resources to build a continuum of quality education, training and re-training in the local labor market.
- **Minimizing Barriers to Employment:** To realize this goal, the board will provide leadership and advocacy, drawing public attention to barriers to employment—illiteracy, childcare, transportation and housing needs, and age and other types of discrimination. The board will become an active participant in efforts to address these issues, and will spearhead efforts where needed.
- **Increasing Accountability in the Delivery of Workforce Development Services:** This will be one of the board's most important responsibilities over the next five years. The board will oversee a process through which measurable performance indicators will be established and benchmarks based on these indicators will be identified for workforce development programs. The board will monitor changes in the quality of the local workforce through the preparation of an annual *State of the Workforce Report*. The board will lead efforts to develop an integrated reporting system to measure the performance of all education and workforce development institutions in the area and to ensure that citizens of the Charlotte-Mecklenburg area are provided the information they need to clearly understand the value of the public funds being spent on education and workforce development in the community.
- **Expanding Community Awareness and Support for Workforce Development:** The board will assume a leadership role in promoting workforce development issues and activities to community, business, civic and education leaders and the public at-large and in building support for policies and initiatives aimed at improving the quality of the workforce beyond the scope of the existing JobLink system. The board will establish a speakers' bureau, develop a web site and pursue other promotional strategies. In addition, the board will engage and build relationships with leaders of the rapidly growing international population and spearhead efforts to establish a regional partnership of area workforce development boards.

An executive summary of Charlotte-Mecklenburg's Five Year Strategic Plan is attached.

Organizing the Board to Carry Out the Plan

Board Committee Structure Changed to Align with Plan Goals

The agenda the workforce board approved as part of its five-year plan is very ambitious. In total, there are 27 specific objectives and 61 detailed strategies which address its five priority goals. As the board began discussing the plan’s implementation at its June retreat, the chair suggested that the board needed to restructure itself in order to better accomplish its new work. Each strategy identified in the plan should be overseen by a committee of the board. Therefore, the board needed to reorganize its committees to align with the five goals in the plan. The rest of the board agreed, and the decision to reorganize based on the new goals was made that day.

By September 1999, with the assistance of its staff, the board developed and approved a committee structure that assigned distinct roles and responsibilities. New committees that emerged from the process included: 1) Life-long Learning Committee; 2) Barriers to Employment Committee; 3) Accountability Committee; and 4) Community Awareness Committee. The previously created JobLink Management Operations Committee remained a free-standing, quasi-independent body charged with day-to-day oversight of the JobLink systems. *Two charts explaining the board’s new committee structure and responsibilities are shown on pages 18 & 19.*

Committee chairs, who in most cases are private sector representatives, are charged to provide quarterly progress reports to the full board. Also, they must report annually on their overall progress for the year and grade their committees on how well they think they have done. This ensures a level of accountability within each of the committees.

Staff Roles and Accountabilities

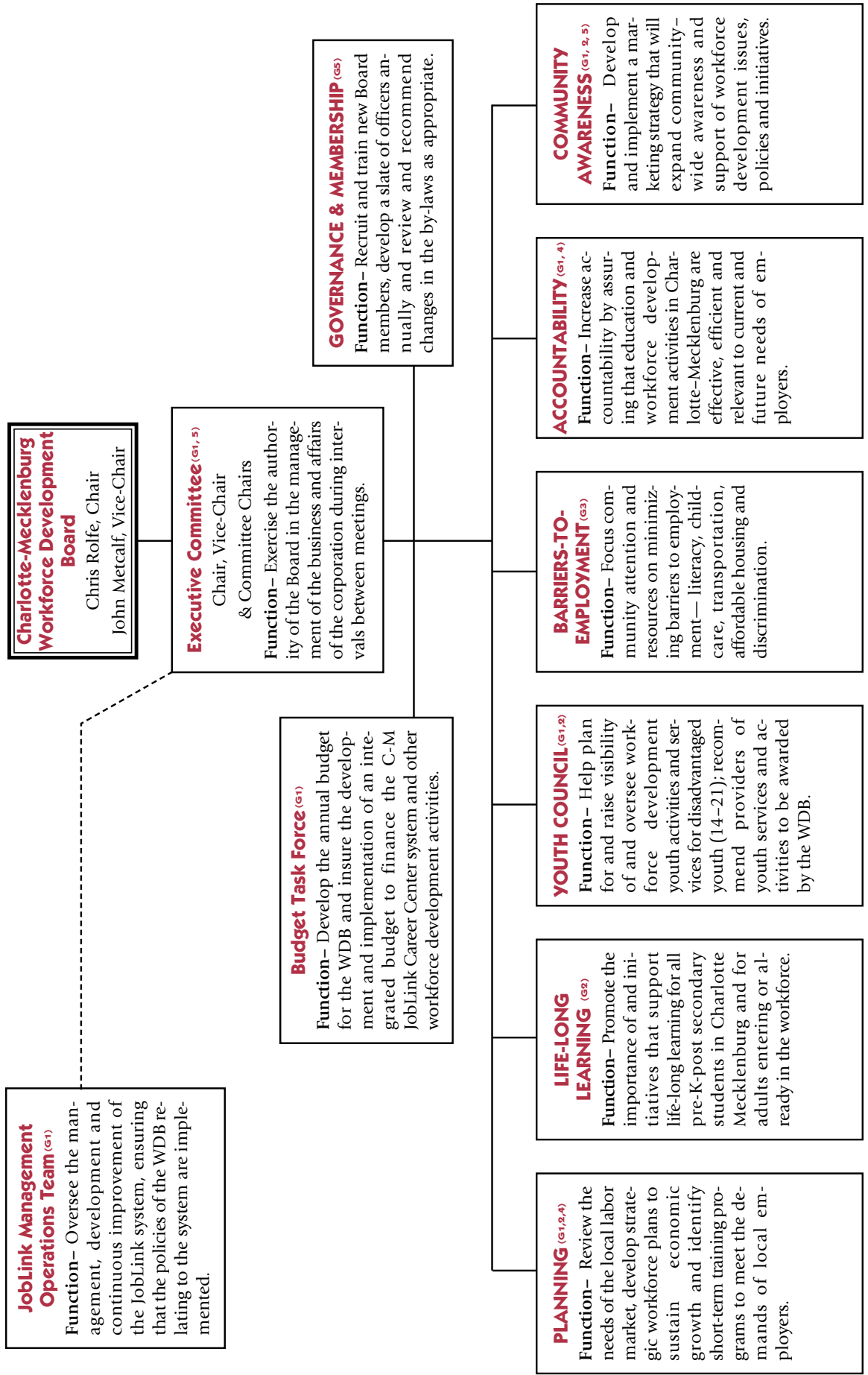
The board also changed the reporting relationship of its own staff. Prior to the approval of the new plan, the board executive director and staff were City of Charlotte employees, accountable not only to the board chair, but also to the City’s Neighborhood Development Director. Having to deal with dual reporting responsibilities and the government bureaucracy had often hampered the work of the board staff in the past. Therefore, the board decided that its executive director and other administrative staff should become direct employees of the board—a non-profit 501(c)3 corporation—and report directly to the chair. This shift in accountability will give the board and its staff greater autonomy in carrying out its work. The City will continue to function as the fiscal agent for the JobLink system, thereby continuing to have an ongoing role in the operational aspects of the service delivery system.

A newly created position, the *JobLink Chief Operating Officer (COO)*, will report directly to the Chair of the JobLink Management Operations Committee. While the COO will coordi-

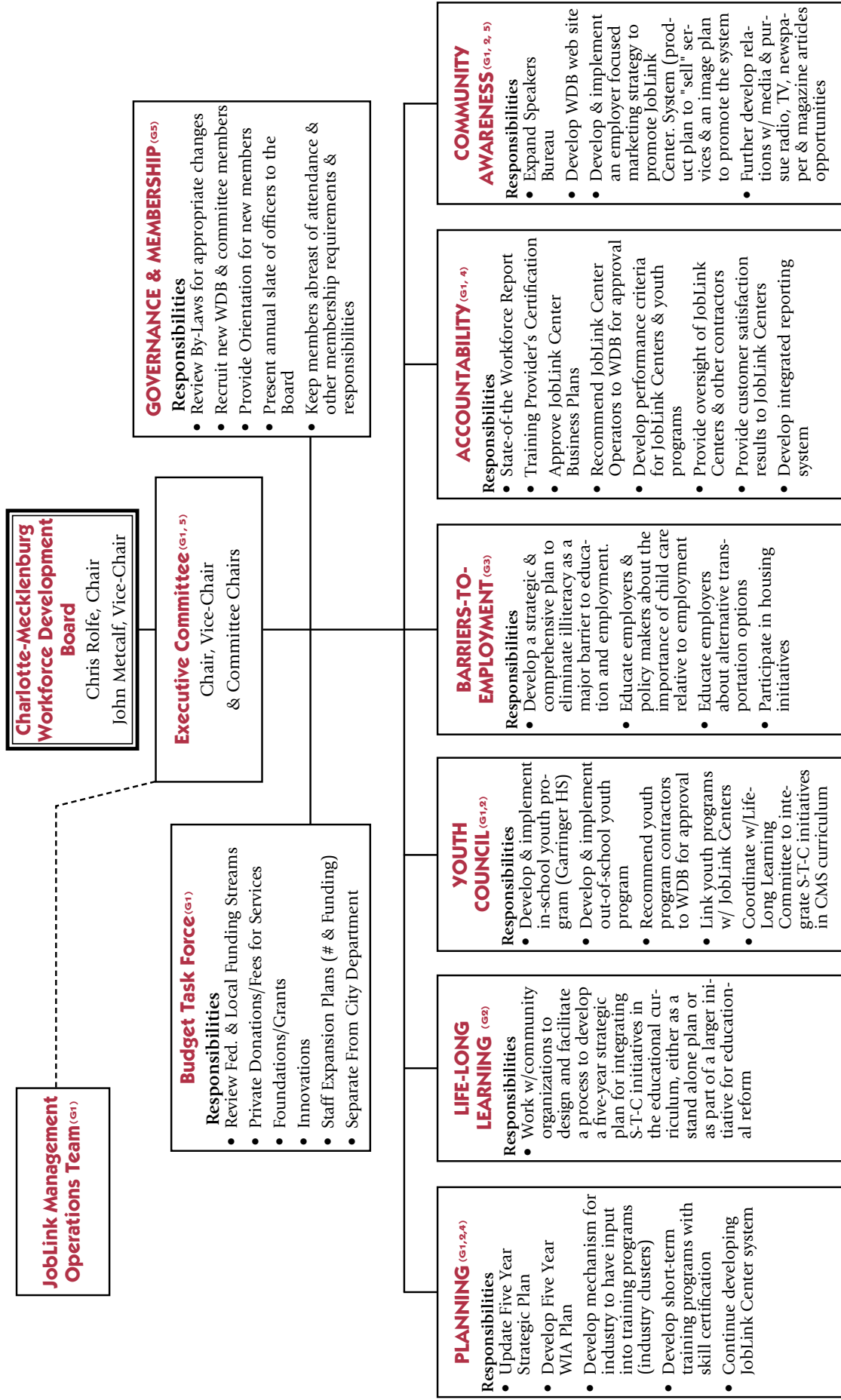
September 1999
Board develops and approves a new committee structure in alignment with the plan’s goals

Late Fall 1999
Board Executive Director and staff begin transition process of becoming employees of the Board

C-M Workforce Development Board Committee Functions



C-M Workforce Development Board Committee Responsibilities



nate with the board staff, the two staff teams will work independently of each other. This distinction in staff roles clearly separates policy from operations, which has continued to be a priority emphasized by the board chair.

The operators of the JobLink centers—of which there will eventually be six—will be responsible for running day-to-day operations. The managers of each center make up a *Business Services Team* which is coordinated by the COO. Close coordination will be essential to ensure consistency in services and to establish an integrated, systematic approach to operating centers and reporting outcomes.

Funding the Board's Work

The board's *Budget Task Force* has been working since the plan was approved to identify additional sources of funding for the board's work. Currently, the board has four staff positions, including an executive director, a planner/analyst, an administrator, and a secretary. The board's current budget is \$307,000, the majority of which comes from federal funds. About one quarter comes from City of Charlotte general funds. The budget task force's main goal is to secure a permanent, diversified funding base which will allow the board to implement its strategic plan without taking needed resources away from service delivery operations.

Building Support in the Community

In addition to organizing itself for the work ahead, the board has focused on promoting its new plan and seeking support for it in the community. The chair has presented the plan to local elected officials, making them aware of the board's agenda and getting their endorsements. Managers of both City and County governments received copies of the plan and were briefed on it as well, as were numerous other leaders in the community.

Already the plan is being used by the Charlotte Chamber of Commerce to help with its recently-completed economic development strategy, *Advantage Carolina*. Several of the "flagship" initiatives recommended in the Chamber's plan involve workforce development issues. The Chamber group in charge of workforce issues is identifying ways in which it can complement and support the workforce board's work. The Chamber's representative on the board serves as the liaison, ensuring coordination of efforts.

To build awareness of and support for the plan at the state level, all members of the Governor's Commission on Workforce Development were given copies of the plan. The Charlotte-Mecklenburg Board Chair is an active member of the Commission and regularly shares information about Charlotte's experience with others across the state.

Lessons Learned

The process that Charlotte-Mecklenburg's Workforce Development Board has gone through to develop its five-year Strategic Plan has been both challenging and rewarding. The following are some thoughts that, in retrospect, should be beneficial to other boards pursuing similar endeavors.

Preparing the Board

- Preparing the mind-set of the board to accept its new roles and responsibilities is as important as actually writing the plan document. In Charlotte, moving the board from "operational oversight" into a "big-picture" policy arena was a very deliberate process that had to be constantly reinforced by the chair, committee chairs and board staff. In fact, strong leadership from both former and current board chairs have been absolutely key to the success of the board's efforts to make this important shift in the board's thinking. It did not occur overnight. People who were very program focused generally had a harder time seeing the "whole forest."
- The success of developing a plan that everyone could live with required that major partners and stakeholders be involved in the planning process from the beginning. Even so, it was not always smooth sailing. Many management and operational issues had to be overcome, particularly when discussing WIA implementation. While the board did not directly get involved in resolving one-stop operational issues, over time it assumed the role of arbitrator in helping address concerns when needed, and in doing so, it helped build a spirit of cooperation that lubricated the planning process.
- Knowing who is the *audience* for the plan is essential. The primary audience for the strategic plan is the board itself. The strategic plan defines the priorities of the board, sets forth the activities the board will undertake to accomplish its goals, and assigns specific responsibility to members and committees for carrying them out. The Charlotte Board Chair continually asked the question, "Whose plan is this?" to clarify and re-clarify that the five-year strategic plan being developed was very different from the traditional technical plan submitted to explain how the board would meet its WIA obligations. Nor was the strategic plan primarily a public relations document to inform the citizenry about the board's work although it could be used for that purpose. This plan was developed to set the future agenda for the board.

Developing the Plan

- The planning committee need not be composed entirely of board members. In fact, the inclusion of community stakeholders is a plus. These stakeholders have specialized knowledge of local problems and programs that will help the board determine its priorities and goals. Also, up-front involvement helps produce broad buy-in and support for the plan later on.
- That said, it is important to remember that planning committee members are generally very busy individuals. To help facilitate discussions at planning meetings, it was important for the meeting facilitator to listen closely and bring back summaries that stressed the main ideas. *In Charlotte, it was not the job of the committee to write the plan.* If the committee had gotten into wordsmithing, the job never would have been done. The focus in committee meetings was kept on the big ideas, and when possible, charts and other illustrations were used to represent those ideas. The full document and executive summary highlighted the big ideas in the way that it is organized and formatted so the reader doesn't have to slog through a lot of narrative to get to what is really important.
- It was a good decision to hire a neutral facilitator to lead the process. This allowed all planning committee members to participate fully without having to deal with logistics or with concerns that the facilitator might have an agenda that favored certain groups or organizations. The entire cost of the planning process in Charlotte was \$45,000, provided from City of Charlotte general funds. This figure included the consultant/facilitator's time, meeting costs and printing and distribution costs for the final document.
- Pulling all the pieces together to develop the plan took considerable time. Six months was a very ambitious schedule, requiring many meetings and extensive work on the part of the consultant and board's executive director. An additional several months may have given the board more time for some external review along the way which may have been helpful and politically prudent. However, if too much time had been devoted to developing the plan, the energy that was created by the fast-paced schedule and constant interchanges might have dissipated. The important thing was to lay out a process with clear expectations and time frames and to clearly identify the roles of the various players. Equally important was having a facilitator who kept the process on schedule and meetings focused on the agenda at hand.
- Constant communication between the consultant and board chair was necessary to ensure that the plan was going in a direction that was in sync with the expectations of the decision makers. It was also important that the board's executive director participated in—but did not lead—all the planning meetings.
- Narrowing the focus of the plan to five or six key goals helped board members clearly understand the full picture. A hierarchy of ideas, objectives and strategies flowed from these main goals.

Implementing the Plan

- Reorganizing the board's committee structure and assigning specific responsibility for carrying out the activities in the plan was crucial to its success. Otherwise, the plan may well have sat ignored on a shelf—as prior efforts had often done.
- Quick follow-up to begin implementation helped maintain the members' enthusiasm for the work. There was no lull in activity. Having a chair who was very task oriented and kept things moving was most helpful. The development of "work plans" for each committee and requiring regular progress reports has helped the chair keep the board on task.
- The board needs to have a dedicated staff that reports to it directly. Having agency staff provide services to the board always raises the question of divided loyalties, endangers the impartiality of the board in the eyes of community stakeholders, and is unfair to the personnel involved.
- The board must continuously work to separate policy and operations. Charlotte has established a quasi-independent JobLink Management Team to oversee the day-to-day affairs of its one-stop centers. The team has its own staff which does not report to the board. However, the team's main mission is to see that the policies of the board are carried out.
- The chair is responsible for keeping the board's attention focused on implementing the plan. In Charlotte, while the chair encourages participation at board meetings, he never lets discussions wander. This helps keep attendance up at meetings and supports the board in elevating the level of its membership. Busy people don't want to waste their time at poorly run, unfocused meetings.

The Future

Over the last several years, the Charlotte-Mecklenburg Board has been refining its ideas about the leadership role it should assume in order to become a effective change agent, policy-maker and advocate for workforce development, as well as an arbitrator of conflict when operational issues arise. It has also clarified the work it should be doing through the development of its five-year strategic plan and its committee reorganization. And recently the board has been looking at ways in which it can leverage its resources and build financial support for its work. Together, these fundamental, "big picture" efforts are laying the foundation on which the board will build its strength, visibility and influence in the years ahead.

**Charlotte-Mecklenburg
Five-Year
Workforce Development Plan**

Executive Summary

**Adopted by the Charlotte-Mecklenburg
Workforce Development Board**

July 15, 1999

Prepared By Carol Morris, Planning Consultant

Preface

This is an executive summary of the Charlotte-Mecklenburg Five-Year Plan. Preparing the plan was a collaborative effort between Carol Morris, Planning Consultant, Workforce Development Board staff and the Workforce Development Planning Committee. The process began in January, 1999 with a series of bi-monthly meetings of the Planning Committee facilitated by Morris. In addition, the Youth Council was formed during this same time period, meeting regularly to organize and provide input into the youth component of the plan. Numerous other individuals and organizations were interviewed and provided input along the way. The final plan was reviewed and discussed at the Workforce Development Board's annual retreat held on June 22, 1999 and adopted by the Board on July 15, 1999.

The plan could not have been completed within the short timeframe without the level of interest, time commitment and participation of those involved in the process. Funding for the project was generously provided by the City of Charlotte Neighborhood Development Department.

Copies of the complete plan are available and can be obtained through the Charlotte-Mecklenburg Workforce Development Office (704-336-3951).

Introduction

Charlotte-Mecklenburg is in the midst of a major economic growth cycle. By early 1999, the county's population climbed to an estimated 644,000 people--20% more than in 1990--and job growth has been significant. Since 1990, an estimated 65,000 new jobs have been created stemming from countless new business openings and expansions.*

Looking to the future, economic forecasters project the current rate of growth may taper off slightly; however, Charlotte and the region can expect continued economic prosperity well into the early 21st Century. An estimated 13,000 new jobs are projected by 2005.** But as Charlotte grows, a key question must be answered: *Will existing and future businesses have a large enough pool of capable and skilled workers to remain economically competitive?*

Based on current dynamics, prospects for the future workforce are uncertain. The area's low unemployment rate--hovering around 2% in mid-1999--reflects very tight labor market conditions. Employers are increasingly frustrated by not having the skilled or entry level workers they need.

The lack of a qualified workforce has been cited as the number one concern of many companies, particularly small businesses. Unfortunately, an end to this labor "crunch" is not in sight. In fact, as the baby boom generation ages and enters the retirement years, the problem will no doubt worsen.

Local business and civic leaders recognize the threat of an economic downturn if current labor shortages continue. In its recently completed strategic economic development plan--*Advantage Carolina*--the Charlotte Chamber identified workforce development as one of its "flagship" initiatives needed to ensure Charlotte's continued economic growth. The plan underscores, "*New thinking and new programs are needed to develop and maintain a world class workforce.*"

Charlotte-Mecklenburg elected officials support the *Advantage Carolina* initiative and have also identified workforce development as a top priority, relating not only to job growth and retention, but to economic revitalization of the inner-city as well. Reducing the relatively high unemployment and underemployment rates in fragile inner-city neighborhoods will be essential to creating more stable and self sufficient neighborhoods and families in the future. It will also be one of the greatest workforce development challenges.

Broadening Our Focus

Cultivating a skilled and capable workforce will not be an easy task. It will require dramatic changes to the current workforce development system, which prepares, trains and supports people in their job seeking and helps employers fill positions in their companies. The system must become much more visible, accessible and better coordinated. Enacted by Congress in 1998, the Workforce Investment Act (WIA) requires that state and local workforce development systems do just that. In addition, priorities must shift so that the system becomes more comprehensive in its scope and reaches a more universal population.

The community's workforce development system should not only engage and support the unemployed or those struggling in low wage jobs, but should also devote more attention to the underemployed and others already active and successful in the workforce but in need of retraining to advance or shift career directions. These are the workers who will comprise the largest portion of Charlotte's workforce in the future. And for full employment, the workforce development system also must recognize and deal with the fact that by 2010, an estimated 25% of the total population will be 55 or older.

A different attitude and creative thinking is needed by both employers and providers of employment and training services on ways to keep older adults engaged in the workforce and contributing in meaningful ways and to take advantage of their knowledge and expertise.

* Source: Charlotte Chamber

** Source: WEFA, Inc. "Population, Household, Employment, Income and Pupil Population Forecasts", July 8, 1998.

Unfortunately, older workers often face barriers to employment such as the reluctance of employers to hire or retain them as full-time employees because of the potential cost of benefits, the lack of up-to-date skills---particularly computer skills---limitations set by Social Security benefits and illiteracy.

Keeping a pulse on the community's changing workforce needs must also be elevated as priority to ensure that the education and skill training provided in Charlotte-Mecklenburg are relevant. Charlotte's economy is experiencing

constant change. Continued growth is expected in our current leading industries--- transportation and distribution services, financial services and high growth manufacturing. However, three emerging industries---information services, software and entertainment and travel---are expected to account for an increasingly larger share of the employment base in the next several years. With these and other changes taking place, the workforce must also evolve, making retraining a much higher priority than it currently is and the public education system more responsive.

Key Workforce Development Issues

In addition to the above, a number of fundamental issues must be addressed, including:

- ⇒ ***Job readiness of workers***
- ⇒ ***High rate of illiteracy among adults and youth***
- ⇒ ***Number of high school drop-outs***
- ⇒ ***Increasing language and cultural with rising international population***
- ⇒ ***Barriers to employment...child care, transportation, housing, discrimination***
- ⇒ ***Hard-to-serve population***

Changing Role of WDB

Charlotte-Mecklenburg's Workforce Development Board (WDB) stands at the forefront of efforts to improve the state of Charlotte's workforce. This 24-member board, consisting of 13 private sector and 11 public sector representatives, is charged with providing policy, planning and oversight for local workforce development programs and addressing workforce development issues. In the past, the WDB focused principally on programmatic issues and the monitoring of employment and training funds, but its role is fast changing. The Board recognizes the workforce "crisis" that

is upon us and is moving away from the more operational aspects associated with workforce development to focus its attention on the big picture policy issues that must be addressed. In so doing, it is assuming a much stronger leadership and advocacy role for workforce development and is in the process of building bridges with employers to increase their involvement and satisfaction level with the changing workforce system. The WDB's changing role and focus is evident in this comprehensive, five-year workforce development plan. Developing this plan is an important milestone for the Board and for workforce development in Charlotte-Mecklenburg.

Purpose of Workforce Development Plan

Charlotte-Mecklenburg's Workforce Development Board (WDB) stands at the forefront of efforts to improve the state of Charlotte's workforce. This 24-member board is charged with providing policy, planning and oversight for local workforce development initiatives. In that vein, the WDB has prepared this *Charlotte-Mecklenburg Workforce Development Plan*, a five-year policy plan.

The purpose of this plan is to:

- 1) establish a vision of where Charlotte's workforce should be by 2005, and
- 2) provide a "roadmap" on how to get there.

It will guide the work of the WDB and will be a platform for making fundamental changes to workforce development. The plan is organized around the following vision and five key goals..

WDB Vision For Future Workforce

By 2005 Charlotte-Mecklenburg will have a larger and more skilled, diverse, motivated and adaptable workforce climbing the career ladder to fuel our economic growth and invest in our community and its neighborhoods. In addition, our future workforce---our youth---will be successfully preparing for the world of work as part of an overall continuum of education and support.

Five-Year Priority Goals

GOAL I

Implement the Workforce Investment Act by developing and implementing a one-stop *JobLink* system that: 1) integrates and streamlines employment and training services for adults and youth; 2) promotes a "work-first" philosophy; 3) reinforces retraining and retention of the current workforce; and 4) provides attractive services and dependable results for employers.

GOAL II

Promote the importance of life-long learning, ensuring that 1) *all* students (pre-K-post-secondary) have a quality education preparing them to succeed in the ever-changing world of work, and 2) adults entering or already in the workforce are encouraged and have ample opportunities to upgrade their skills in response to changing workforce needs and challenges.

GOAL III

Focus community attention and resources on minimizing barriers to employment---literacy, childcare, transportation, affordable housing and discrimination.

GOAL IV

Increase accountability in assuring that education and workforce development activities in Charlotte-Mecklenburg are effective, efficient and relevant to current and future needs of employers.

GOAL V

Expand community-wide awareness and support of workforce development issues, policies and initiatives.

Goal 1. Implement the Workforce Investment Act

Background

Coordinating and streamlining employment and training services through a “one-stop” delivery system is a top priority of the WDB. On August 7, 1998, Congress passed the Workforce Investment Act (WIA) designed to ensure that employment, training, literacy and vocational rehabilitation programs in the United States are consolidated, coordinated and improved.

The act, which officially takes effect in North Carolina on January 1, 2000, provides the framework for reforming current workforce development programs. It requires that state and local agencies become partners in developing more efficient and effective ways of delivering services. State-wide the new system is known as the “*JobLink*” system. Guiding principles for developing and operating the system are that it:

- ⇒ *Be highly visible and accessible*
- ⇒ *Provide universal access to core employment services*
- ⇒ *Be outcome driven and customer friendly*
- ⇒ *Support life-long learning*
- ⇒ *Respond to the changing economy and existing and future labor market needs*
- ⇒ *Demonstrate responsible stewardship of public resources*

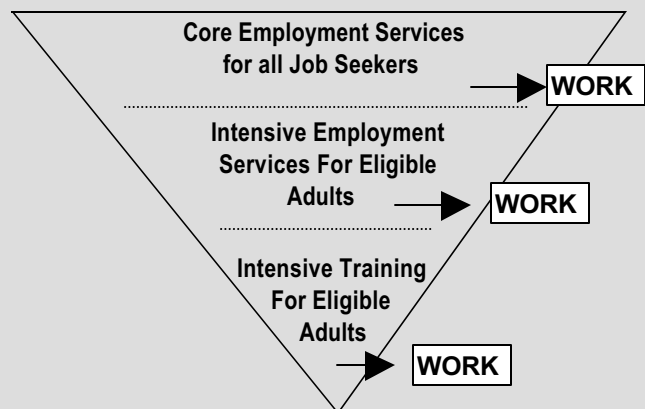
Charlotte-Mecklenburg has begun implementation of the WIA by chartering two *JobLink* centers already, one in the Uptown and another on South Boulevard. Thirty information and referral call centers are linked to these centers. In addition, required certification for training providers has been established by the WDB, and a Youth Council has been formed to help develop and oversee activities for youth. While Charlotte has done much already, more must be done over the next five years to build and expand the *JobLink* system.

Plan Highlights

Over the next five years:

- Create an **interconnected network of *JobLink* Centers** consisting of six full-service centers (*Uptown, South Blvd., North Tryon Street, Wilkinson/ West Blvd. area, NC 51/ Arboretum area and University area*), satellite and call centers and self-service kiosks.
- Provide the **resources** necessary to operate the system--- staff, funding, equipment, etc.--through **memoranda of understanding** established between *JobLink* partners and the WDB.
- Create and maintain an **integrated technology information system** linked to the state system.
- Provide a **continuum of services to adult job seekers** based on a “work-first” philosophy at all *JobLink* Center.

A “Work-First” Philosophy of Service Delivery

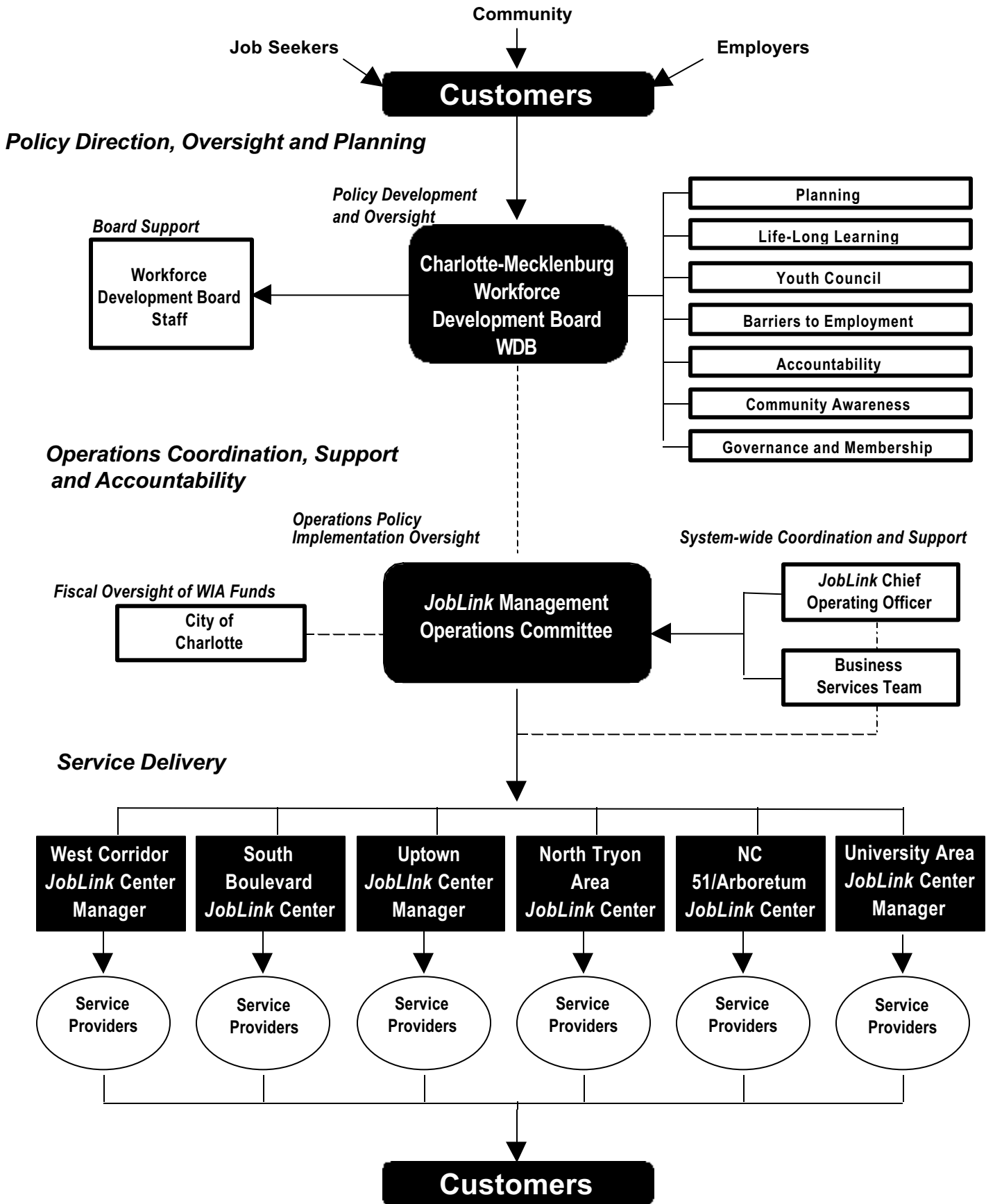


- **Certify training providers** to offer a range of training options for customers and develop an **Individual Training Account** system (ITAs).
- Help **disadvantaged in-school youth** successfully prepare for employment and/or further education/training through a **pilot program at Garringer High School** that blends academic learning with summer employment and community-based support.
- Engage more **disadvantaged out-of-school youth** in employment and training activities through **community-based services** provided in Enterprise Communities.

Plan Highlights For WIA Implementation (continued)

- Increase **employer awareness** of and involvement and satisfaction with the *JobLink* system through:
 - focused **marketing**
 - coordination of **job development** activities to create a single point of contact
 - better **screening of job applicants**
 - **survey** of employer needs
 - **industry councils** to provide input into education and training programs
 - menu of **customized services** for employers
- Establish and implement an **organizational structure** for the *JobLink* system with clear lines of accountabilities that:
 - reinforces the **WDB's role** in policy development and oversight vs. implementation
 - establishes the **JobLink Management Operations Committee** as a freestanding operational oversight committee with its own charter and operating procedures
 - creates a **chief operating officer** position reporting to the chairman of the Management Operations Committee and responsible for the day to day management and coordination of the system
 - ensures that each *JobLink* Center has a **full-time center manager** to run the center's day-to-day operations
- Provide **adequate funding for the overall coordination of the system** through partner contributions established through the memorandum of understanding and by developing an **annual budget for the chief operating officer**.
- Ensure **fiscal accountability** for the system by developing and implementing an **integrated accounting system** for overall *JobLink* system coordination and for each of the centers.
- Ensure that the **performance expectations** of the *JobLink* system are met by establishing an **integrated management reporting system for operations** including a tracking system for follow-up after job placement.
- Aggressively **promote the JobLink system** and secure the necessary support for its timely implementation by:
 - developing two types of **marketing plans**----1) a "product" plan to inform the general public about the services, including a strategy to develop an integrated web site, and 2) an "image" plan to inform groups of people about the system and its benefits.
 - providing elected officials regular **status reports on progress** being made with the *JobLink* system and soliciting their **support and cooperation** in helping to implement it
 - pursuing opportunities for providing **input into state and federal legislation** that may impact the local *JobLink* system or its funding
 - seeking financial and in-kind **support from the business community** where appropriate
 - building strong **relationships with non-profit agencies** and their boards to support mutual goals through the *JobLink* system
- **Continuously improve** the annual performance outcomes of the *JobLink* system by establishing **management systems which assure integrated planning and performance evaluation** using the Malcolm Baldrige National Award Criteria which address:
 - leadership
 - information and analysis
 - strategic planning
 - human resource development and management
 - process management
 - business results
 - customer focus and satisfaction

The JobLink System Organizational Chart



II. Promote Life-Long Learning

Preparing Our Youth

Underlying many of today's workforce issues is education. While many graduates of the current K-12 education system successfully make the transition to post-secondary education or the world of work, others do not. For Charlotte to achieve the vision of having a larger and more skilled and adaptable workforce in place, much more emphasis must be placed on better preparing *all* graduates for life after school.

The public school system must do a better job of integrating academic learning with applied or work-based learning. Students need to see the relevance of academic learning---math, reading, science, etc---in the work environment. They also need more exposure to the world of work through work-based learning experiences such as job shadowing, internships, apprenticeships or summer employment. In addition, students need to develop thinking, decision making, work ethic, leadership and other life skills as part of their learning experiences and to embrace the concept of life long learning, enabling them to continually update their skills in response to changing workforce needs.

Preparing students for the world of work should begin early on in the educational process. It should become part of the curriculum and comprehensive career guidance system from early childhood education to post-secondary education. As part of this, parents should become better informed about choices their children can make in shaping their career pathways and pursuing post-secondary education or training and employment options.

Charlotte-Mecklenburg Schools (CMS) has taken steps over the last several years to broaden the scope of education by focusing more on school-to-career initiatives, but only a small percentage of students and faculty are participating in these efforts due to limited funding. The majority of state and local funds have been devoted to improving academic competencies of all students---the top state and local education priority---and in creating more

equity in schools. While improved academics and equity in education are essential to Charlotte-Mecklenburg's public education system, workforce development is as important an ingredient for overall education. The Board of Education's commitment to build a much needed technical high school is a sign that school-to-career initiatives may be rising in priority.

For the last several years, the Workforce Development Board through its School-To-Career Partnership, has been promoting efforts to broaden the role of public education in developing a skilled workforce. It has been instrumental in bringing employers, educators and policy makers to the table to build consensus and plan for change, and it will continue to play an active role in the future. Most recently, the Charlotte Chamber, through its *Advantage Carolina* initiative, has also identified school reform as one of the flagship initiatives aimed at sustaining economic growth in the region.

Regardless of who is addressing the issue of education, the message is loud and clear --- *change is needed*. A continuum of school-to-career initiatives for all students should be part of the change.

Training/Retraining Adult Workers

It wasn't long ago that a person entering the workforce for the first time stayed with the same company that hired him or her, or at least remained in the same type of job or career. But times have changed and so has the workforce. It's estimated that at any one time, nearly one third of the current workforce is looking for another job or wanting to shift career paths. Now workers can expect three to four career changes throughout their work life. This recent phenomena not only springs from workers' desires to change directions for personal growth and satisfaction or for financial gain, but also from the necessity to survive in the rapidly changing work place.

Technological and other changes in business and industry are forcing workers to constantly evaluate their knowledge and skill levels. If people don't upgrade their skills, they become vulnerable and in many cases, no longer viable workers. The need and desire for training and retraining of adults is evident in the enrollment figures at CPCC. Of the estimated 70,000 enrolled in classes at the school, the majority are working adults---many of them self-declared underemployed---who are seeking technical training or other marketable skills to advance in the work place. Twenty percent of all CPCC students already have a bachelors degree or higher.

In response to the rising demand for skill development and retraining, the school has turned its attention to providing short-term training programs---a year or less in duration---in addition to its more traditional degree programs. Working with area employers, CPCC currently offers approximately 50 of these short-term courses, and it plans to broaden its base of offerings as time goes on.

In past years, the focus for training as part of the public sector local workforce development system has been on helping disadvantaged residents get their GEDs and/or obtain lower level skills to enter the workforce. While the need for this level of training is great and must continue---it remains a significant component of the emerging *JobLink* system--- the local workforce development system, including the Workforce Development Board, must broaden its purview to include training and retraining of other adult workers already employed and successful in the work place or temporarily displaced.

It is an issue not only for workers and training providers, but for employers as well. Employers must take a more active role in local training and retraining efforts and explore options for providing such training for their current employees. It is to their benefit to get involved.

As previously mentioned, the retraining of older adults to adapt to new and different work situations should also become more of a priority in Charlotte. The knowledge, expertise and work ethic that many older adults---55 and older---bring to the work place can be of great value to employers.

As the baby boom generation soon moves into the retirement years, the loss of this generation of workers will be significant, creating a sizable gap in the work place. It will be essential to the stability of our future workforce to make productive use of older adults who wish to remain working. Retraining will be an important ingredient in the mix of incentives and other strategies to keep them active in the workforce, at least on a part-time basis.

Plan Highlights

- **Help build public and private sector support for systemic changes in the local education system favoring implementation of school-to-career initiatives** for all students by working with the Chamber, CMS, CPCC and others to **develop a five-year strategic plan for integrating school to career initiatives** in the educational system. The plan should address:
 - integration of school and work-based learning
 - comprehensive career counseling
 - involvement of business and industry in curriculum design and work-based learning
 - career-focused professional development for educators
 - strategies for parent involvement
 - coordination and articulation between CMS, CPCC and four-year institutions
 - a funding strategy for implementation
- **Address job retention and underemployment issues in the workforce through increased availability and awareness of training and retraining opportunities by:**
 - forming task force to develop campaign to engage and educate employers of value of upgrading skills of current workforce
 - increasing number of short-term training programs offered

III. Focus Community Attention and Resources on Barriers To Employment

Background

While many workers may have the ability to be productive in the workplace, they face what may seem to be insurmountable barriers to employment—illiteracy, the cost and availability of quality child care, the lack of transportation to work, lack of affordable housing choices and job discrimination. These and other barriers can also trap people in low wage jobs.

The WDB recognizes the strong correlation between having a skilled workforce and breaking down the barriers that limit people's ability to work or advance in jobs. Therefore, it intends to become a more visible advocate for such issues, focusing community attention and resources on the issues within a context of workforce development.

Literacy

An estimated 22 % of Charlotte's adult population is operating at the lowest end of the literacy continuum, according to a recent National Adult Literacy Survey conducted by the National Center For Family Literacy (NCFL). In addition, thirty-one of Charlotte-Mecklenburg's schools have been identified as "low performing" due to low literacy scores.

The lack of basic skills is one of the greatest concerns identified by area employers. According to the 1996 *Job Skill Needs Survey and Study* prepared by the Urban Institute at UNCC, employers ranked reading, writing, basic arithmetic and speaking/listening as the top basic skills needed for entry level workers.

Through the years many organizations and individuals have been fighting the literacy battle in Charlotte; however, the battle still rages. A number of effective literacy initiatives exist, but the community as a whole has not come together to deal with literacy in a comprehensive, strategic way.

Child Care

Finding quality child care is an issue most working parents face, regardless of income. In many cases, it can be the determining factor as to whether parents or legal guardians of children are able to work. The cost of child care, particularly when several children are in a family, may make it economically unfeasible for a parent in a lower wage career to work and pay for child care services. Clearly the child care dilemma is most apparent with the working poor or with people making the transition from welfare to work. For single parents, the affordability issue is even more profound.

Child Care Resources indicates that over 2,200 children currently are on the waiting list for subsidized child care. With recent changes in eligibility, more children will soon become eligible for subsidized care, causing the list to increase even more. Other child care-related issues include:

- *The lack of child care for middle school-age children*
- *The lack of non-standard child care— evenings, overnight, weekends, drop-in and sick-child care*
- *The quality of child care due to low licensing standards and lack of qualified child care workers*

The child care dilemma and its impact on the workforce is an issue more employers must become sensitized to and proactive with as the demand for more workers increases. Not only does it affect the current workforce, but it also has long-term implications. The evidence is clear that the quality of early childhood education and child care plays a significant role in the ability of children to learn and succeed in education and life. The children of today will become the workforce of tomorrow.

**Source: Carolina Real Data, March, 1999*

Transportation

The lack of transportation to employment is an issue for many Mecklenburg County residents, particularly those living in the inner-city (City Within A City). According to the 1990 Census, approximately 18% of the near 64,000 households had no personal vehicle available. Fortunately, inner-city residents have the greatest access to public transportation, but many of the suburban employment centers are not accessible to or have limited public transportation. Future plans for mass transit will address many of the transportation issues, but these plans will not be fully realized for many years.

The City of Charlotte Department of Transportation has been working with a number of area employers and employer groups to provide van or shuttle service to suburban employment centers from inner-city locations. For example, a pilot program in the Arrowood industrial area---where over 30,000 jobs exist---has been developed. EZ Rider, an inner-city shuttle service, also provides transportation for lower income residents to destinations often not accommodated by regular transit routes, but the service is limited.

While establishing a transit system that connects major population centers to employment hubs is the long term ideal, more programs similar to those mentioned above are needed in the meantime to connect people to jobs in the suburbs.

Safe and Affordable Housing

Housing prices in Charlotte have risen steadily over the last ten years. According to the National Association of Home Builders, Charlotte has the third highest priced housing market in the South. Half the homes are priced above \$150,000 and half below that figure. The average cost of a two bed-room, market rate apartment is \$693 per month.*

As Charlotte grows in population, the demand for safe and affordable housing is increasing, yet the supply is not keeping pace with it. Low and

Moderate-income residents have the greatest challenge to find affordable housing. Nearly 4,000 residents are on a waiting list for public housing, and over 1,000 people are on the list for Section 8 subsidized housing; this list waiting list has been frozen since 1993.

Low and moderate-income residents have limited or no housing choices in many of the new suburban growth areas where many jobs are locating. The lack of affordable housing coupled with limited public transportation options make it increasingly more difficult for employers in these areas---e.g. South Park, NC 51 Corridor, I-485 interchanges, and North Mecklenburg---to attract and retain entry lower wage workers. As housing prices continue to rise as expected, the labor shortage in these suburban areas will no doubt increase.

Job Discrimination/Diversity

As Charlotte grows, our population is becoming increasingly more racially, ethnically and religiously diverse. Federal law prohibits discrimination of workers based on age, race, gender or nationality is prohibited by law. However, unlawful discrimination occurs, often based on stereotyping or lack of understanding about differences in people. For example, older adults are often denied employment opportunities because of employer stereotypes that older workers can not adapt to a fast-paced job, their benefits will be too costly or they can't learn new skills.

Discriminatory practices against physically disabled workers are also fairly common. Denying people with past criminal records is also a form of discrimination that is affecting a number of Charlotte's potential workers. Organizations who assist lower income residents in being trained and finding employment have identified discrimination against people with past criminal records as one of their greatest challenges in placing workers. In many cases, the crime committed occurred a long time ago or has no bearing on the type of work to be undertaken. Convincing employers that these workers are reliable and can do the job at hand is indeed a formidable task.

As Charlotte's international community increases in number, denying people employment based on language or cultural differences will inevitably become more pronounced. For example, in some cultures, women are not supposed to look people in the eye when they talk to them. This custom may be the only factor standing in the way of employment. Language barriers may also be translated by employers as lack of knowledge or ability. Recognizing the fallacy of this, some employers have provided on-site language classes or link to CPCC or other institution to ensure that their international workers become more proficient with the English language and consequently have more success on the job.

Unlawful discrimination for reasons that don't have anything to do with performance or abilities

is an issue that needs to be addressed to ensure that everyone has the opportunity for employment, that area employers have enough qualified workers to fill positions in the future and to promote diversity in the workplace.

Approaching discrimination from a legal standpoint is one way to deal with some of the issues described above, and employers should be held accountable when violations occur. However, a more proactive, preventative approach is needed advocating greater diversity in the workplace and awareness and education of both employers and workers about discrimination and the impact it has on the overall workforce and steps that can be taken to prevent it from occurring.

Plan Highlights

Literacy

- **Focus community attention on literacy** and its impact on developing a highly skilled workforce by facilitating the **formation of a planning task force** of community business, community and education leaders to 1) define literacy for Charlotte and 2) to develop a **strategic and comprehensive plan to eliminate illiteracy** as a major barrier to education and employment.

Child Care

- Actively **support efforts to:** 1) **educate employers and policy makers** about the importance of child care to workforce development, 2) **increase public funding** for child care, and 3) **increase employer participation** in programs and employment practices that support working parents and their children.
- Establish a **liaison between the WDB and the Child Care Resources Board of Directors** and/or subcommittees to support mutual goals.

Transportation

- Work with the Chamber and Department of Transportation to **help promote alternative transportation programs to employers**, encouraging them to participate in and help finance such programs.

- **Encourage policy makers to support and fund transportation initiatives** that will help connect workers to job sites.

Safe and Affordable Housing

- Actively **support efforts to increase the supply of affordable housing for Charlotte's workers** and link to transportation initiatives aimed at connecting workers to employment centers.

Job Discrimination

- **Focus community attention on issues of discrimination and diversity in the workplace** and the social and economic value of overcoming discriminatory hiring and other employment practices by:
 - identifying and **recognizing employers who actively support the hiring and advancement of disenfranchised groups and individuals** and communicate their success stories to other employers.
 - supporting and **promoting community efforts aimed at educating employers and workers** about ways to minimize discrimination in the workplace and increase diversity.

IV. Increase Accountability For Workforce Development

Background

How successful are Charlotte's public education, employment and training providers ---individually and collectively---at educating, building and retaining a high quality workforce? The answer to this question is not clear, yet it is fundamental to Charlotte's workforce development efforts.

The *Job Skill Needs Survey and Study* prepared by the Urban Institute in 1996 reveals a significant gap between where the workforce is and where employers think it should be. This and other related research has led the Workforce Development Board to conclude that changes in Charlotte's workforce must be measured over time. Without a clear understanding of where the workforce is relative to the needs, the community will find it difficult to gauge the effectiveness of workforce development initiatives.

In response to this need, the WDB has commissioned the Urban Institute to prepare a *State of the Workforce Report* providing bench-marks on various levels of workers. The final report, to be completed in the fall 1999, will be an important tool for planning changes and improvements to local workforce development policy and programs. The report will provide base-line information for core indicators of success.

In addition, the WDB recognizes that assuring and communicating accountability for performance should to be elevated to a higher priority for workforce development. While the agencies and institutions that deliver services in the community provide performance information on an annual basis, often what is reported are numbers of people served or number of people who have passed certain tests or other qualifying bench-marks. This is important information, but knowing the difference being made relative to job readiness and employer satisfaction is of equal or greater value.

Accountability for performance will be an important component of Charlotte's *JobLink* system. The Workforce Investment Act requires that performance of those partners receiving WIA funds or affiliated with the one-stop system communicate annual outcomes performance to the public---number of people finding jobs, wages earned after six months on the job, etc. Certification for training providers delivering services to *JobLink* participants will be based on the ability of the providers to perform. But accountability for workforce development needs to extend beyond the *JobLink* system. Accountability should be institutionalized community-wide.

Plan Highlights

- **Assess and monitor changes in the workforce** each year as a means of evaluating the effectiveness of workforce development policy and operations in Charlotte-Mecklenburg by:
 - **surveying employers** to identify levels of satisfaction with the workforce and an assessment of skills needed
 - preparing a **State of the Workforce Report** every other year or as recommended, revealing changes in the workforce based upon measurable indicators and benchmarks
 - **updating the Workforce Development Plan** to address issues identified through the above or other that surface
- Ensure that the public is provided information allowing it to **clearly understand the value of public funds being spent on education and workforce development** in Charlotte Mecklenburg by developing an **integrated reporting system for performance** of all education and workforce development institutions.

V. Expand Community Awareness of and Support for Workforce Development

Background

Workforce development is integral to Charlotte's economic growth. While recognized as such, it has not received the high profile, community-wide discussion and commitment that other important issues such as transportation or equity in schools have. However, it needs to.

Businesses and industries experiencing labor shortages may be forced to move to surrounding counties or elsewhere to survive, and new businesses may seek other locations where the labor supply is more plentiful. The impact on the community could be significant.

The Workforce Development Board is on center stage to set and oversee implementation of workforce development policies for Charlotte-Mecklenburg, yet the work of the Board is not widely known. It is often viewed as an entity only dealing with government employment and training programs; however, the scope of the Board's work has become much broader in recent years. For example, it has been highly involved in defining and promoting work ethic for employers and employees, and through its upcoming *State of the Workforce Report*, will identify the gap between where the workforce is and where employers need it to be. This important information will help shape community employment and training efforts.

In the coming years, the WDB sees elevating its role as a champion for workforce development in Charlotte-Mecklenburg. While continuing to set policy and oversee implementation of public sector initiatives, the Board will take a more proactive role in engaging and educating the business community and public policy makers on workforce development issues and soliciting their support to effect change.

Plan Highlights

- Promote **workforce development as a key economic and social strategy** for Charlotte-Mecklenburg and the region through:
 - an expanded **speakers' bureau**
 - development of a **WDB web site** linked to other workforce development sites on the Internet
 - relationships with the **media**
 - inclusion of representatives of the **international community** on the WDB and its subcommittees
 - development of a **regional partnership** among area-wide workforce development boards to build an organized regional constituency for legislative action at state and national levels
 - Identifying opportunities for and facilitating **community dialogue** on workforce development issues

Implementation

Implementation of this policy plan will occur, in part, through the various subcommittees of the Workforce Development Board. Committee assignments for addressing policy issues are provided in the plan for each of the fifty plus implementation strategies. The committees will establish implementation priorities and schedules.

Individual accountabilities for ensuring that the strategies are implemented are also identified in the plan. These individuals will be responsible for ensuring that more detailed planning and operational systems and strategies are developed to implement the plan's policies.

Quarterly progress reports on the plan's implementation will be made to the WDB and at the end of each year, the overall performance of the WDB, its committees and staff will be evaluated based, to a great extent, on outcomes resulting from the plan's implementation. This will allow the Board to monitor the plan's effectiveness and identify changes needed as part of an annual plan update.



**National
Association
of Workforce
Boards**

1201 New York Avenue, N.W., Suite 350
Washington, DC 20005
(202) 289-2950



Business
Coalition for
Workforce
Development

