Workforce Development Board
Business Services Committee
18 W. Beach Street, Watsonville
Wednesday, November 16, 2016 @ 3:00 pm

Agenda

I. Call to Order/Welcome

II. Approval of Agenda

III. Public Comment

IV. Approval of Minutes from January 28, 2015 meeting ...... 2-10
   March 11, 2015 meeting notes—no quorum, no approval
   November 18, 2015 meeting notes—no quorum, no approval
   Needed; March 9, 2016 meeting—cancelled

V. Consent (separate from the agenda packet)
   C.1 Business Engagement Plan

VI. Administration
   A.1 Committee Dashboard.................................................... 11
   A.2 Committee Strategic Plan (Discussion) ......................... 12

VII. Chairperson’s Report

VIII. Adjournment

Next WIB Meeting: Workforce Development Board Meeting
   Wednesday, February 22, 2017 @ 8:30 AM
   Simpkins Swim Center
   979 17th Ave
   Santa Cruz, CA 95062

Next Committee Meeting:
   March 8, 2017 @ 3:00 PM
   Watsonville Career Center
   18 W. Beach St., Watsonville

The County of Santa Cruz does not discriminate on the basis of disability, and no person shall, by reason of a disability, be denied the benefit of the services, programs, or activities. This meeting is located in an accessible facility. If you are a person with a disability and require special assistance in order to participate in the meeting, please call (831) 763-8900 (TDD/TTY-711) at least 72 hours in advance of the meeting in order to make arrangements. Persons with disabilities may request a copy of the agenda in an alternative format. As a courtesy to those affected, please attend the meeting smoke and scent free.
Jack Cheney, Committee chair, called the meeting to order at 3:04 pm.

**Committee Members in Attendance**
Cheney, Jack  
Custodio, Valerie  
Hood, Dave  
Morse, Rob  
Sherer, Howard

**Committee Members Absent**
Tysseling, Bill

**Staff in Attendance**
McNeil, Gary  
Interim WIB Director  
Paz-Nethercutt, Sara  
Senior Analyst

**Guests**
Laurel Jones, Cabrillo College  
Julie Lambert, WIB Member, Martinelli’s  
Claire Laughlin, Cabrillo College  
Ellen Murtha, Goodwill Central Coast- Workforce Santa Cruz County

**Subject: Welcome and Introductions**

**Discussion:** The chair welcomed everyone attending the special meeting. Introductions were made as there were a number of new guests in attendance. The chair gave a special welcome to Dr. Laurel Jones, Superintendent and President of Cabrillo College.

**Subject: Public Comment**

**Discussion:** None.

**Subject: Chair’s Report**

**Discussion:** The chair gave a brief overview and history of the committee for the benefit of the guests in attendance.
Subject: Director’s Report
Discussion: The interim director thanked everyone for coming to the special meeting.

Subject: Approval of November 17, 2014 Minutes
Discussion: The chair called for the November 17, 2014 minutes to be approved.
Action: Approval of November 17, 2014 Minutes

Status:
Motion to Approve: Rob Morse
Motion Seconded: Valerie Custodio
Abstentions: None.
Committee Action: All vote in favor. Motion passed.

Subject: Discussion and Action Item
D.1 Workforce Innovation and Opportunity Act (WIOA) Update
Discussion: The interim director gave a brief update on the status of WIOA referring to attachment 1 of this agenda item as a reference for the governor’s office position on the state’s workforce. Federal and State guidance in terms of regulations are delayed until spring 2015. We should all expect full and complete implementation to take years as it did with the Workforce Investment Act. This topic will continue to be on the agenda for all the updates. Ellen Murtha, Business Services Representative with Workforce Santa Cruz County went to a sector strategy conference. She gave a few highlights of the one day she was able to attend. Highlights included a discussion on identifying sector partners instead of just sectors. The ASPEN Institute offers resources, including toolkits for working with sector strategies. Another highlight included the discussion on use of labor market information for understanding, adjusting and validating the job market. Lastly, with WIOA sector strategies, it is important to find out what businesses are looking for, tapping into training funds such as Employment Training Panel (ETP) and determining what gaps exist. Economic Development agencies need to be at the table and local areas need to recruit allies and develop solid partnerships.
Action: Accept update on the Workforce Innovation and Opportunity Act (WIOA)
Status: The Committee discussed the item without formal action.

Subject: Discussion and Action Item
D.2 Business Services Committee Task- meeting the needs of local business
Discussion: Roundtable discussion included the identification of common gaps in potential hires including effective communication skills, essential employability skills (i.e. soft skills, work habits), customer relations and “resourcefulness”. Valerie Custodio shared the Target Corporation culture of training all of their team members, according to the specific position, in the same way which includes a comprehensive online series of
modules. Locally, Target does not have issues with finding qualified applicants but rather keeping the employees because of the lack of affordable housing in the county. Dave Hood of First Alarm described the entry level jobs at First Alarm, which fall into two classifications, security services, and electronic security systems. Wages for available jobs range from $15/hr. to $75,000 per year. While First Alarm does not have its internal training program it sit provides a technician apprenticeship, office training and shadowing. For new applicants, First alarm looks for effective communication skills, basic work skills, good customer service skills, and general computing skills. First Alarm would like to be able to clearly identify these skills in the job application process. Rob Morse from PG&E reported that his utility company has great training programs for new employees, and lots of jobs that offer great careers. He added that there may be many jobs available over the next ten years due to the number of retirements in the work force. He would like to see the WIB to identify core job skills, and also provide training for more specialized and advance skills in electronics, mechanics, and programming. Training should address both the required and desired skills reflected in job listings. Jack Cheney commented on the basic skill levels required for his business, and Howard Scherer supported the importance of training for essential employability skills. Claire Laughlin, consultant for Cabrillo College Corporate Training, gave a brief overview of the department and the long standing history of collaboration with this WIB and local businesses. Her department can be called upon for an assessment of sorts to determine what exactly that business needs for their staff training. In the past, her department has surveyed local businesses to ask the question about community training needs for the local job seeker. She was asked by committee to come up with a list of “foundation skills” that most employers are looking for in their candidates. She will send WIB staff a list and include the full class offerings from her department. In the past, her department has even developed basic skills classes such as, plumbing 101, electrical 101 and construction 101 for very entry level positions.

**Action:** Discuss and Approve the action item(s) derived from the presentation for Business Services Committee task 3

**Status:** The Committee discussed the item without formal action.

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**Subject:** Information Item

I.1 Labor Market Information

**Discussion:** None.

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Meeting adjourned at 4:46 pm

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**Next Meeting:** March 11, 2015 @ 3:00 PM
Watsonville Career Center
18 W. Beach St., Watsonville
Jack Cheney, Committee chair, called the meeting to order at 3:11 pm and established there was no committee member quorum.

**Committee Members in Attendance**
Cheney, Jack  
Sherer, Howard

**Committee Members Absent**
Custodio, Valerie  
Hood, Dave  
Morse, Rob  
Tysseling, Bill

**Staff in Attendance**
McNeil, Gary  
Paz-Nethercutt, Sara

**Guests**
Claire Laughlin, Cabrillo College  
Ellen Murtha, Goodwill Central Coast- Workforce Santa Cruz County

**Subject: Welcome and Introductions**
**Discussion:** The chair welcomed everyone to the meeting.

**Subject: Public Comment**
**Discussion:** None.

**Subject: Chair's Report**
**Discussion:** The chair determined that a quorum could not be established and that the group present would hold an informational session only and agenda items would not be up for action.

**Subject: Director's Report**
**Discussion:** The interim director thanked everyone for coming to the meeting. He commented on articles in the Sentinel newspaper that reported employees are leaving jobs for advancements from their entry level positions and the economy is more robust.
Subject: Approval of January 28, 2015 Minutes

Discussion: There was no member quorum, no action taken on the January 28, 2015 minutes.

Action: None. No quorum, so this item will be considered at the next Committee meeting on 11/18/15.

Status: Pending approval.

Subject: Discussion and Action Item

D.1 Workforce Innovation and Opportunity Act (WIOA) Update

Discussion: Interim director gave a brief update on the status of WIOA and reported that the re-designation and re-certification of the existing board is in the works. A state directive reflects that local boards are being re-designated for a two (2) year period and each will have a one (1) year certification. The draft federal regulations are still due out later this spring.

Action: Accept update on the Workforce Innovation and Opportunity Act (WIOA)

Status: The Committee discussed the item without formal action.

Subject: Discussion and Action Item

D.2 Business Services Committee Task 2- Employer Survey

Discussion: Committee members present reviewed the survey. They would appreciate periodic reports on the data collected. Committee member Howard Sherer shared that his experience shows a 30-45% response rate can be expected. Conducting a “test run” of a sample of employers was suggested.

Action: Review and discuss implementation strategy for business survey.

Status: The Committee discussed the item without formal action.

Subject: Discussion and Action Item

D.3 Business Services Committee Task 3- meeting the employment needs of local business

Discussion: Committee members present gave opinions of the skills gap they see in the current job seeker. The following skills and abilities are commonly missing from the job seeker pool: business writing and communication skills, customer service skills; time management; essential employability skills. They would like the WIB to gather information from employers to determine a broader list from which workshop curriculum could be developed. The challenge is always convincing the job seeker to accept they need the class. For many entry level positions, a list of core competencies that could be identified as
either recommended or required would be helpful for hiring purposes. A skills proficiency certificate could result from successfully passing the curriculum and ideally have some value to both the job seeker and the employer.

**Action:** No quorum, so this item will be considered at the next Committee meeting on 11/18/15.

**Status:** Pending approval.

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**Subject:** Information Item

**I.1 Labor Market Information**

**Discussion:** None.

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**Subject:** Information Item

**I.2 Rapid Response and Early Alert Activities**

**Discussion:** None.

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**Subject:** Information Item

**I.3 Job Fair Data**

**Discussion:** None.

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**Meeting adjourned at 4:12 pm**

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**Next Meeting:** November 18, 2015 @ 3:00 PM
Watsonville Career Center
18 W. Beach St., Watsonville
Jack Cheney, Committee chair, called the meeting to order at 3:03pm and there was no quorum established.

Committee Members in Attendance
Cheney, Jack
Morse, Rob
Sherer, Howard

Committee Members Absent
Custodio, Valerie
Hood, Dave
Tysseling, Bill

Staff in Attendance
Gazza, Laurel WIB Administrative Coordinator
Paz-Nethercutt, Sara WIB Senior Analyst
Stone, Andy WIB Director

Guests
Murtha, Ellen Goodwill Central Coast-Workforce Santa Cruz County
Roman, Beatriz Goodwill Central Coast – Workforce Santa Cruz County
Ullestad, Sharolynn Goodwill Central Coast – Workforce Santa Cruz County

I. Welcome and Introductions

Discussion: Chair Jack Cheney welcomed everyone to the meeting

II. Approval of Agenda

Discussion: Because there was no quorum, agenda could not be approved.

Action: None taken

III. Public Comment

Discussion: Ellen Murtha of Goodwill Central Coast-Workforce Santa Cruz County introduced her staff members Sharolynn Ullestad and Beatriz Roman to the committee.
Subject: Approval of Minutes from January 28, 2015 meeting. (March 11, 2015 meeting had no quorum, so no approval of those minutes is needed.

Action: None taken. The January 28, 2015 Meeting Minutes could not be approved, due to no quorum.

V. Administration Items A1 through A3

A1. Committee Dashboard (Discussion only)

Discussion: WIB Senior Analyst Sara Paz-Nethercutt went over each graph presented on the dashboard and explained what information each graph covers. A spike in layoffs was mentioned and Chair Jack Cheney asked why layoffs had increased. Members expressed their approval of the dashboard format.

A2. Committee Strategic Plan (Discussion only, due to no quorum)

Discussion: WIB Director Andy Stone began discussion by stating that this was his first Business Services meeting, and mentioned that the focus should be on business needs. Members then discussed various topics such as where the Business Services Committee would be headed, how workers could be better trained to meet business needs, and how workers could obtain the soft skills needed to better suit employers needs. A career fair which focuses on only certified workers would be featured, was also discussed.

A3. Committee Task – Employer Survey (Discussion only, due to no quorum)

Discussion: WIB Director Andy Stone stated that an Employer Survey was sent out recently to 69 employers that had worked with Workforce Santa Cruz County in the last year. Of the 69 surveys sent out, the WIB received four responses, one of which requested a follow-up. Jack Cheney and Howard Sherer noted that the response from employers was low, compared to number of surveys sent out. Members discussed how there could be better outreach to employers regarding the services they need.
VI. Chairperson’s Report

Discussion: Chair Jack Cheney thanked WIB Director Andy Stone and WIB staff for their efforts in putting the committee meetings together.

VII. Adjournment: The meeting was adjourned at 4:24 pm.

Next WIB Meeting: Workforce Investment Board Meeting
Wednesday, February 24, 2016 @ 8:30 AM
Simpkins Swim Center
979 17th Ave
Santa Cruz, CA 95062

Next Meeting: November 18, 2015 @ 3:00 PM
Watsonville Career Center
18 W. Beach St., Watsonville
Program Year 2016-2017
July 1, 2016 - September 30, 2016

Hiring Events

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<tr>
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<th>Capitola CC</th>
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<tr>
<td>July</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>August</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>September</td>
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PY 16/17 Goal/Actual = 10/30, 33%

Job Orders

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<th>Dislocated Worker</th>
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| Annual Goal = 30

OJT Contracts

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Lay offs Averted

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At-Risk Businesses Served

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<tr>
<td>August</td>
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</tr>
<tr>
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Q1 = 36.7

Q1 = 15
### A.2 Committee Strategic Plan

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<th>Business Services Committee</th>
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<tr>
<td>MEETING DATE:</td>
<td>November 16, 2016</td>
</tr>
<tr>
<td>STAFF NAME:</td>
<td>Andy Stone, WDB Director; Sara Paz-Nethercutt, Sr. Analyst</td>
</tr>
</tbody>
</table>

**SUMMARY:**

When this committee was established in 2013, the overall goal was to develop and make recommendations for a business service plan in an effort to increase employer involvement in the activities of the local Workforce Development Board (WDB).

The Workforce Innovation and Opportunity Act (WIOA) tasks WDBs with contributing *to economic growth and business expansion by ensuring the workforce system is job-driven - matching employers with skilled individuals.*

1. Committee Discussion Suggestions:
   - How can this committee better fulfill its mission?
   - Who do we need at the table to help the Business Services Committee promote services?
   - What are some initiatives the committee is interested in pursuing?

2. Develop Strategic Plan: It is intended that the resulting discussion will lead to the development of an action plan for the Committee.

- Attachment(s)

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**SUGGESTED MOTION: (if applicable)**

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C.1 Business Engagement Plan

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<th>COMMITTEE:</th>
<th>Business Services Committee</th>
<th>MEETING DATE:</th>
<th>November 16, 2016</th>
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<tr>
<td>STAFF NAME:</td>
<td>Andy Stone, WDB Director; Sara Paz-Nethercutt, Sr. Analyst</td>
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SUMMARY:

On June 2, 2016 the WIB Business Services Committee held a business engagement strategic planning session facilitated by Business U. As a result of the feedback obtained at this meeting, Business U has prepared the attached recommendations for a WDB (formerly WIB) Business Engagement Plan.

[Attachment(s)]

SUGGESTED MOTION: (if applicable)

I move to accept the Business Engagement Plan as written and work as a committee to develop its strategic plan.

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<tr>
<td>BOARD DATE</td>
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<td>BOARD APPROVAL:</td>
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<td>Other:</td>
</tr>
</tbody>
</table>
# Business Engagement Strategic Plan – June 30, 2016

**Workforce Investment Board Santa Cruz County**

**Business Engagement Strategic Plan**

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EXECUTIVE SUMMARY

A Strategic Business Engagement Plan (BEP) provides clear direction on how a workforce organization can maximize its efforts on engaging business as a partner (in sector strategies, career pathways and work-based learning), as a customer (with business services), and even as a funder (through social investment strategies, sponsorships and in-kind donations). This BEP is a living, breathing document that should continue to reflect the changing market needs of business and industry within Santa Cruz County and its region at large. The BEP has been developed for the Workforce Investment Board of Santa Cruz County (WIBSCC), and it has the potential to meet the scaling needs of coordinated efforts among all business/employer facing staff within their respective organizations to retain and grow businesses regionally. The BEP includes a combination of the following information:

1) The current state of business engagement practices.
2) Defined business engagement goals, objectives, strategies and metrics.
3) Future looking recommendations to maximize business engagement.

WIOA: Focus on Business Engagement

The Workforce Innovation and Opportunity Act (WIOA) has an expanded role with respect to business engagement for workforce development boards and its staff (see Appendix A). There is a focus on: 1) regional coordination including sector strategies, sector initiatives, delivery of workforce services based on data (e.g., LMI); 2) a greater alignment with economic development and education to drive a collective response to labor market challenges; 3) prioritization of an employer-centric system: employer engagement strategies to strengthen business services; and 4) a soon to be announced business engagement metric(s).

Moreover, in support of overarching policy objectives as outlined in the California Workforce Development Board’s Unified State Plan (2016-2020), there are four strategies (Figure 1) that align with business engagement. Outlining these strategies is a call-to-action to local workforce boards—how then do they organize business engagement efforts in support of these strategies? A first step is to define a business engagement “ideal state” (Figure 2) for their organization, and then align it with the framework to develop, implement and measure business engagement strategies and activities.
Ideal State Framework

An ideal state (click on Figure 2 to enlarge) for a regional market responsive business engagement team is one that is able to respond to regional market needs with a portfolio of offerings for businesses that are relevant in all business cycles—downsizing, stable, and growth. The result of working toward an ideal state is the retention and growth of regional businesses that spur increased employment opportunities and job seeker success. Business U used this framework to evaluate the WIBSCC and its service delivery organization as well as Workforce Santa Cruz County’s (WSCC) current business engagement efforts as a means to develop initial recommendations that align with key business engagement metrics.

To gather objective data for the current state evaluation, Business U employed a combination of quantitative and qualitative research methods such as:

1. Business U’s Market Responsive Baseline Assessment – sent via email to designated WIBSCC community partners as well as to business-facing staff of WSCC.
2. One-on-one telephone interviews were conducted with key stakeholders & partners.
3. A facilitated onsite strategy session with members of the WIBSCC board.

The triangulation of methods provided the opportunity to study current WSCC business engagement efforts, as well as identify overarching themes and practices, pinpoint challenges, and highlight salient barriers to effective business engagement. The full report of this assessment may be downloaded here.
BEP Sections and Recommendations

This BEP is divided into seven sections that reflect elements of the ideal state as defined above and to drive and support meaningful business engagement discussions with the WIBSCC, its Business Services Committee, WSCC staff, community and regional partners as well as with the active membership that comprise the WSCC partnership. You will find in each section of the BEP, a definition for that section, followed by a SWOT (i.e., strengths, weaknesses, opportunities and threats) analysis, business engagement recommendations, goals, objectives, strategies and metrics when appropriate.

At the end of the BEP on page 28, there is an action plan summarizing the goals, objectives, and strategies that Business U is recommending to maximize business engagement, including a designated priority level as shown in Figure 3. The Summary Action Plan will serve as a road map for WIBSCC board members, staff and its Business Services Committee to further discuss the recommendations and timeline, and to reprioritize as they deem necessary.

Figure 3: Recommendations Priority Legend & Timeframe

<table>
<thead>
<tr>
<th>Priority Level</th>
<th>Business U’s Recommended Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Priority</td>
<td>1st Quarter (7/1/16 – 9/30/16)</td>
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<tr>
<td>Medium Priority</td>
<td>2nd Quarter (10/1/16 – 12/31/16)</td>
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<tr>
<td>Low Priority</td>
<td>3rd/4th Quarter (1/1/17 – 6/30/17)</td>
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</table>
Section 1: VISIONARY LEADERSHIP: THE FOUNDATION

This section of the plan is the foundational structure of the BEP because it identifies key goals and objectives that align with the organization’s business engagement vision and mission, and the key metrics needed to track progress. Business engagement is defined as engaging business as a partner (in sector strategies, career pathways and work-based learning), as a customer (with business services) and as a funder (through social investment strategies, sponsorships and in-kind donations).

SWOT Analysis: Business Engagement Current State
Visionary Leadership

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>There was a strong awareness among the interviewees in the one-to-one interviews of the various partners and organizations that serve business and industry within the county.</td>
<td>Nearly one third (29%) of those stakeholders interviewed during the one-to-one interviews said that they did not partner with other regional organizations around business engagement thus creating a siloed approach to business outreach.</td>
</tr>
<tr>
<td>The SBDC has a very strong presence, as does Cabrillo College and the Chambers of Commerce—these organizations were named during many of the interviews as organizations that serve business and industry.</td>
<td>Transactional approaches are used rather than attempting to work together to solve problems for business growth and retention.</td>
</tr>
<tr>
<td>Among WSCC, its board and staff, and the partners, there is a cultural will to develop a coordinated effort for business engagement that aligns with WIOA.</td>
<td>The Board values are not defined which leaves room for interpretation.</td>
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<tr>
<td>There are several sector strategy initiatives taking place across the region with an effort to positively affect employment.</td>
<td>Current metrics do not reflect the market impact of efforts in business engagement.</td>
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<tr>
<td>A number of efforts target the development of workers to meet the needs of business &amp; industry such as K-12 pipeline development; Agriculture Academy; Tech Program.</td>
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<tr>
<td>Current WIBSCC strategic goals include key elements of business engagement and the Business Services Committee is proactively seeking strategies to execute successfully.</td>
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<tr>
<td>There is an integration of TANF-funded staff as part of the business engagement team.</td>
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Opportunities

- Develop a clear vision of business engagement and roles of partners via consensus building sessions.
- Educate organizations about the services and assets each bring to businesses within the service area.
- The WIBSCC’s strategic plan recommends surveying businesses to shape services, identify skills gaps and raise awareness of service offerings; this could be accomplished during day-to-day consultations with business and industry.
- There is an opportunity to coordinate business engagement across the region.

Threats

- Missed state and federal funding opportunities that are regionally focused.
**Recommendations**

**Recommendation 1.1**

The WIBSCC should consider developing a formal Mission and Vision for the business engagement team. The “team” is defined as the service delivery arm of the board and staff (WSCC) that interfaces with employers/businesses; and focuses their efforts exclusively on the value propositions of its services to the business community.

**Mission Draft:** Workforce Santa Cruz County is responsive to the needs of industry by providing a robust portfolio of services, solutions and strategies that support the retention and growth of businesses in Santa Cruz County spurring increased employment opportunities and job seeker success.

**Vision Draft:** The Workforce Santa Cruz County business engagement team is top of mind among regional businesses as a high valued partner in helping them grow, compete and thrive. Because of our work, Santa Cruz County businesses continually add workers to their payrolls reducing unemployment rates and enhancing the economic sustainability of our region.

**Recommendation 1.2**

So that the WSCC can align its service delivery with the values of the WIBSCC, it is recommended that a definition be developed for each of the current values so that there is no room for interpretation. The values highlighted in red below are ones that Business U believe also pertain to business engagement.

**Current WIBSCC Values:**
- Private business leadership
- Meaningful engagement
- Collaboration and maximizing resources
- Opportunities for youth
- Healthy businesses
- More jobs, lower unemployment rates and higher living standards

**Values Recommended Drafts:**

**Meaningful Engagement** – We interface with business and industry to continually identify their most immediate needs and provide either a workforce solution directly, or refer to a regional partner that can solve and anticipate challenges that stand in the way of retaining employees and growing their business.

**Collaboration & Maximizing Resources** – We seek to collaborate with a wide range of organizations within the community that provide business solutions for growth and retention. We do this by including the resources of our community partners in our portfolio of services to expand our reach and coordinate our business engagement efforts.

**Healthy Businesses** – We strive to understand what businesses need with each interaction to ensure that we provide solutions, services and strategies that will remove the barriers that prevent them from thriving in the community and competing regionally.

**Recommendations 1.3**

The WIBSCC should finalize an initial set of business engagement goals and objectives that focus the efforts of the service delivery business engagement team (WSCC) and that they are aligned with the Mission, Vision and Values as well as include key strategies and metrics. Appendix B provides a draft Business Engagement Scorecard that summarizes key
performance metrics and how to capture measurable data. Appendix C contains a draft standardized needs assessment to be used when interacting for the first time with a new business customer.

**Goal #1: Improve WSCC’s market position among high growth sector businesses within Santa Cruz County.**

**Objective 1.1:** By (insert date), WSCC will improve awareness of its services, business solutions and strategies among high growth sector businesses by (insert percentage).

**Objective 1.2:** By (insert date), WSCC will improve its market penetration rate among high growth sector businesses by (insert percentage).

**Objective 1.3:** By (insert date), WSCC will improve brand equity among high growth sector businesses by achieving a customer satisfaction rating (insert rating) of (insert percent) or more of its current customers.

**Strategies:**
- Leverage the upcoming Capitola Merchant Survey to capture a baseline assessment of WSCC’s market position.
- Finalize the standardized needs assessment draft to capture market position (see Appendix C).
- Develop a baseline for market penetration rates of high growth sectors in Santa Cruz County (see Appendix B).

**Key Metrics:**
- WSCC Brand Awareness – overall and by sector
- WSCC Brand Comprehension – overall and by sector
- WSCC Market Penetration Rates – overall and by sector
- WSCC Customer Satisfaction Rates – overall and by sector

**Goal #2: Enhance regional collaboration among employer/business facing organizations to retain businesses in the area and increase job growth.**

**Objective 2.1:** By (insert date), WIBSCC and WSCC will have contributed to the growth of (insert number) jobs within the County among high growth sector businesses.

**Strategies:**
- Identify a list of high growth sector businesses for outreach.
- Implement a standardized needs assessment and use it to understand and help remove the barriers for business growth (Appendix C).
- Use data from the standardized needs assessment to identify job growth projections (Appendix C).
- Use the standardized needs assessment to support businesses with layoff aversion (Appendix C).
- Identify and partner with community organizations to refer services that will solve businesses immediate challenges.
- Work with entrepreneurs to grow employment opportunities.

**Key Metrics:**
- Needs assessment: identified barriers to business growth and referrals to key partners to help remove them.
- Job placements by high growth sector.
- Job placements with entrepreneurs.
- Work-share solutions implemented to avert layoffs.

**Goal #3: Focus the development of sector strategies and career pathways on high growth and emerging sectors to solve key industry needs that will grow the regional economy.**

**Objective 3.1:** By (insert date), WSCC will identify skills gaps in the region and share information with WIBSCC.
Objective 3.2: By (insert date), WIBSCC will identify sector strategies to address skills gaps in the region.

Strategies:
- Use current research noted in the WIBSCC Strategic Plan such as EMSI and BLS data to gather the types of questions that need to be posed to business and industry to validate skills gaps.
- Use a standardized needs assessment to evaluate the ongoing skills gaps reported by businesses, locally and regionally (See Appendix C).
- Develop a feedback loop to sector strategy committees/groups that provides data about the region’s needs using both the current research noted in the WIBSCC Strategic Plan and the ongoing results of the needs assessment.

Key Metrics:
- Metrics should be defined based on the sector strategies employed. Review the Jobs for the Future PowerPoint as an additional resource to identify sector strategy metrics. The WIBSCC can discuss these metrics to determine which are applicable for specific initiatives.

Goal #4: Build the capacity of the business engagement team that aligns with a cultural and operational structure that supports and implements both transactional and transformational relationship building approaches with regional employers and businesses.

Objective 4.1: By (insert date), the WIBSCC will host a professional development event.

Strategies:
- Identify potential community and regional partners to join the business engagement team and its coordinate outreach efforts.
- Include/invite community and regional partners to professional development business engagement events to align, share, and develop collective goals.
- Deploy the Business Engagement Self-assessment (Appendix E) and aggregate data to pinpoint professional development opportunities for team members and regional engagement partners to build capacity.
- Ensure that a standardized set of protocols and processes are agreed upon in order to coordinate efforts and key outcomes for professional development events.

Key Metrics:
- The number of referrals provided to partner organizations to solve business challenges
Section 2: REGIONAL VERTICAL NETWORK: EXPANDED SERVICE PORTFOLIO

WIOA points to multiple ways that the workforce system will need to respond to business and industry with a regional focus on business services. A solid first step is for workforce boards to create within their local service delivery a structure for coordinating efforts among all workforce staff that interface with business and industry, followed by integrating local partners such as chambers of commerce, economic development, education, small business development centers and other organizations that serve business and industry. This allows regional, coordinated efforts to achieve an ideal state (Figure 2 above) for a business engagement team that is able to respond to market needs with a broad portfolio of offerings that is relevant in all business cycles—start-up, downsizing, stable, and growth.

The first step in developing a coordinated cross-vertical team is to create an asset map—identifying the resources organizations have at their disposal to serve business and industry, including specific services housed within their respective portfolios.

This section of the plan contains foundational elements that support a regional asset map. It identifies the resources and services partners in workforce development, education, and economic development have to engage businesses as a customer, partner and/or funder.

Business U’s research uncovered a host of valuable partner services. While Table 1 below lists the resources belonging to specific organizations, this is not an exhaustive or static listing of regional services—as more partners join coordinated engagement efforts with additional resources (e.g., funding incentives, subsidized programs), the region’s asset map will expand. It is imperative that a market responsive business engagement team is made aware of the resources, services, initiatives and tools available in their region to support and maximize engagement efforts. Businesses welcome this local knowledge to help solve their immediate needs as well as identify anticipated challenges that may prevent them from growing their companies and retaining employees.

Table 1: Asset Map – Updated June 2016

<table>
<thead>
<tr>
<th>Organization</th>
<th>Services Provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>Santa Cruz Chamber of Commerce</td>
<td>Business fairs; leadership training; “Small Business Day” (event); Community calendar; and advertising platforms for local businesses via our website.</td>
</tr>
<tr>
<td>Goodwill Central Coast</td>
<td>On-the-job training contracts; training in high growth sectors (hospitality &amp; tourism); recruiting assistance; funding for subsidized workers under SmartHire; Onsite recruiting assistance; but our main focus is recruitment.</td>
</tr>
<tr>
<td>CA EDD</td>
<td>Information on tax incentives for hiring; business taxes; labor market data; and the labor exchange network (CalJobs).</td>
</tr>
<tr>
<td>Santa Cruz County Office of Education</td>
<td>We work with youth and try to place them in a job.</td>
</tr>
<tr>
<td>Human Service Department, Employment &amp; Benefit Services Division</td>
<td>We do not offer services to businesses. We offer services to citizens and our partners help us get them employed.</td>
</tr>
<tr>
<td>Community Action Board</td>
<td>We work through the WIB to offer employment subsidies; support entrepreneurs through the Chamber; and provide business fairs and job matching.</td>
</tr>
<tr>
<td>Workforce Santa Cruz County</td>
<td>Layoff Aversion; Rapid Response; Job Fairs; Specialized recruitment.</td>
</tr>
<tr>
<td>CET – Center for Employment &amp; Training</td>
<td>We offer in demand training in the following fields: 1) Green Building Construction; 2) Custodial Services; 3) Welding Fabrication; 4) Medical Clerk; 5) Retail Operations; and businesses can use our facility to conduct interviews.</td>
</tr>
</tbody>
</table>
Pajaro Valley Chamber of Commerce | Networking opportunities; advocacy with local government on “pressing issues”; “Passport to Work” job matching—this program pairs students with available jobs.

Santa Cruz County Economic Development | Access to Ombudsman for permits and land buys & referrals to banks for financing

City of Santa Cruz Economic Development | Permit assistance; façade improvement; mural and sign program; “Grow Santa Cruz” loan program; parking assistance; open counter for online permitting, which helps businesses see where they might want to locate based on applicable fees.

Cabrillo College Corporate Training | We provide training and consultation services mostly around soft skills and customized training for business needs.

City of Capitola Economic Development | Access to city staff to ask questions to businesses, and a database of commercial property sites that businesses can access to find a location.

SBDC (at Cabrillo College) | Free of charge assistance to small business owners in Santa Cruz County, from pre-venture to legal steps to establish a business, and from writing business plans to obtaining financing.

El Pájaro Community Development Corporation | Develops micro-businesses by helping low-income minority entrepreneurs via resources, instruction, bilingual/bicultural business training, business incubation, professional consulting and coaching.

Monterey Bay Economic Partnership | Focused initiatives including workforce development, high tech, hosts events

Santa Cruz Works | Local science and tech community support

Santa Cruz Community Credit Union | Micro-loans and business financial support

Cabrillo Career Technical Education | Training for incumbent workers

Cabrillo College Foundation | Events

United Way (Financial Committee) | Nonprofit partnership

Human Care Alliance | Nonprofit Collaborative

Department of Rehabilitation | Placement services

Employment development Department | Workforce development services

Dominican Hospital Foundation | Industry partner

Santa Cruz County Business Council | Advocacy for area businesses

Aptos Chamber and Scotts Valley Chamber | Business led organization partner

UCSC | Education partner

**SWOT Analysis: Business Engagement Current State**

**Regional Vertical Network**

**Strengths**
There are a multitude of available and valuable services within the region to support the growth and retention of business & industry.

SBDC received a grant from the County to help advance food production businesses by educating potential business owners on the ability to have a home kitchen certified as a production facility.

**Weaknesses**
There are currently siloed approaches without the use of standardized protocols for business outreach and engagement both within the WSCC and among its partners.

There may need to be a deeper understanding of sector partnerships, as 43% of partners interviewed defined it as targeting individual efforts to high growth sectors. Outreach protocols to business do not currently include processes to identify business’ current challenges.
**Opportunities**
Organized efforts around business engagement would prevent communication fatigue with current and perspective business customers.

There is a need within the county to examine high growth sectors and convene businesses to ask deeper questions around worker shortfalls. If shortfalls are found, career pathways could be designed.

Business-facing organizations would benefit through a standardized protocol for referrals and follow-up to businesses as a means to understand how to increase their interactions and decrease their expectations—the foundation for building transformational relationships with business and industry.

Leverage the regional sector strategies currently taking place with other workforce boards to communicate the strategic work of the Board, staff and partners in growing the economy.

In the past, Cabrillo College Corporate Training led a health care industry partnership to upskill workers and meet business needs in nursing and other health care roles, but this has since ended. As one respondent pointed out, these need to be real, sector-driven needs: “You can’t just manufacture the opportunity” for a sector strategy; it must be based on knowledge of the market.” A standard needs assessment would help organizations have real-time data to evaluate market trends.

**Threats**
Siloed interactions may create loss of market penetration.

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**Recommendations**

**Goal #2: Enhance regional collaboration among employer/business facing organizations to retain businesses in the area and increase job growth.**

**Objective 2.1:** By (insert date), WIBSCC and WSCC will have contributed to the growth of (insert number) jobs within the County among high growth sector businesses.

**Strategies:**
- Convene partner organizations that interface with business and industry to develop a standardized protocol for referrals, feedback, and follow-up to businesses.
- Add questions to standardized needs assessment to continually ask businesses about workforce challenges and applicant skill shortfalls (See Appendix C).
- Identify a list of high growth sector businesses for outreach.
- Implement a standardized needs assessment and use it to understand and help remove barriers for business growth (Appendix C).
- Use data from the standardized needs assessment to identify job growth projections (Appendix C).
- Use the standardized needs assessment to support businesses with layoff aversion (Appendix C).
- Identify and partner with community organizations to refer services that will solve businesses immediate challenges.
- Work with entrepreneurs to grow employment opportunities.
Key Metrics:

- Referrals among partners within the business engagement team to solve issues
  - How many received?
  - How many given?
- Decrease of skills gaps based on needs assessment responses.
- Results from the Needs assessment: barriers to business growth and referrals to key partners to remove them.
- Job placements by high growth sector.
- Job placements with entrepreneurs.
- Work share solutions implemented to avert layoffs
Section 3: UNDERSTANDING THE MARKET: TYPES OF DATA SETS

This section pertains to the use of data including identification of the region’s high growth sectors and the business composition within the region, as well as how business and industry perceive the WSCC and its partners. A market responsive team has real-time data at its fingertips to anticipate business needs and track industry trends.

The WIBSCC developed its four-year strategic plan based on regional economic and workforce information that was analyzed to identify industry sectors and occupational clusters that are high growth, including sectors projecting skills shortages, as well as their economic vitality to the region. Secondary data used for this analysis included a wide range of federal, state and local sources including U.S. Census and Bureau of Labor Statistics, California’s Employment Development Department and local chamber and economic development organizational plans. This collective data was used to determine annual demand occupations.

Moreover, according to EMSI data (2013-2017 WIBSCC Strategic Plan), it is projected that by 2017, Santa Cruz County will increase its total number of jobs from 116,756 to 121,522; a net gain of 6,943 jobs representing a 4.1 percent job growth rate. This data can be used as a resource to help establish goals for improving job growth projections.

Additionally, it would be helpful to use a standardized needs assessment to continually validate secondary research sources in real time. (Appendix C).

SWOT Analysis: Business Engagement Current State

Understanding the Market

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is a wide range of federal, state and local data sources used to inform strategies.</td>
<td>There is a lack of ongoing primary data to validate trends and needs.</td>
</tr>
<tr>
<td></td>
<td>There is no market perception data or process to capture.</td>
</tr>
<tr>
<td></td>
<td>There is no standardized needs assessment tool.</td>
</tr>
<tr>
<td></td>
<td>There is no feedback loop in current workflow processes to ascertain market impact and business perceptions of services.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convene partners to develop and use a standardized needs assessment tool.</td>
<td>Funding cuts would inhibit the organization’s ability to capture data and interface with business and industry effectively.</td>
</tr>
<tr>
<td>Leverage the City of Capitola’s “merchant surveys” to add questions that will help ascertain workforce needs.</td>
<td></td>
</tr>
</tbody>
</table>

Recommendations

Goal #2: Enhance regional collaboration among employer/business facing organizations to retain businesses in the area and increase job growth.

Objective 2.1: By (insert date), WIBSCC and WSCC will have contributed to the growth of (insert number) jobs within the County among high growth sector businesses.

Strategies:
- Convene partner organizations that interface with business and industry to develop a standardized protocol for referrals, feedback, and follow-up to businesses.
- Add questions to standardized needs assessment to continually ask businesses about workforce challenges and applicant skill shortfalls (See Appendix C).
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Key Metrics:
• Referrals among partners within the business engagement team to solve issues
  o How many received?
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• Results from the needs assessment: barriers to business growth and referrals to key partners to remove them.
• Job placements by high growth sector.
• Job placements with entrepreneurs.
• Work share solutions implemented to avert layoffs

Goal #3: Focus the development of sector strategies and career pathways on high growth and emerging sectors to solve key industry needs that will grow the regional economy.

Objective 3.1: By (insert date), WSCC will identify skills gaps in the region and share information with WIBSCC.

Objective 3.2: By (insert date), WIBSCC will identify the sector strategies to address skills gaps in the region.

Strategies:
• Use current research noted in the WIBSCC Strategic Plan such as EMSI and BLS data to gather the types of questions that need to be posed to business and industry to validate skills gaps.
• Use a standardized needs assessment to evaluate the ongoing skills gaps reported by businesses, locally and regionally (See Appendix C).
• Develop a feedback loop to provide data to sector strategy committees/groups to keep them inform of the region’s needs by using in combination current research noted in the WIBSCC Strategic Plan and ongoing results from the needs assessment.

Key Metrics:
• Metrics should be defined based on the sector strategies employed. Review the Jobs for the Future PowerPoint as an additional resource to identify sector strategy metrics. The WIBSCC can discuss these metrics to determine which are applicable for specific initiatives.
Section 4: BUSINESS ENGAGEMENT TEAM STRUCTURE: STANDARDIZED PROCESSES

A process is a collection of activities or steps that takes inputs and creates outputs that are of value to a customer. This section of the report defines team roles and responsibilities (within the workforce organization) and/or with its community partners. It ensures standardized protocols for prospecting, outreach and fulfillment of business needs.

Business U’s research uncovered the following job titles of business-facing teams in Santa Cruz County that exemplifies the diverse roles within various organizations that interface with business and industry in some capacity.

### Full Time:
- Directors
- Managers
- Administrative Staff
- City Manager
- Community Development Officer
- Membership Relations Director
- Project Manager
- CEO
- Business Services Representatives
- Job Placement Assistants
- Employment Program Representative
- Work Experience Specialist
- Job Developer
- Program Director for Employment Programs
- Assistant Director

### Economic Coordinator
- Economic Manager

### Part Time:
- Employment Program Representative
- Economic Coordinators
- City Manager
- Community Development Director
- Senior Planner

### Adjunct / Volunteer Roles:
- Board member
- Undergraduate Interns
- Instructors
- Contractors

### SWOT Analysis: Business Engagement Current State

#### Business Engagement Team Structure

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>The total number of full time business facing staff in the region is 19. The number of part time business-facing staff in the region is 59, which includes contracted staff from the SBDC, instructors, undergraduate interns, and a fleet of Chamber-based board members who are “evangelists.”</td>
<td>The 78 business-facing staff are, for the most part, working in silos and there are no systems in place to leverage and coordinate efforts. Without coordinated processes for prospecting outreach fulfillment of business’ needs, there is a missed opportunity to collect real time data and evaluate. Communication &amp; compassion fatigue may be occurring due to a lack of among businesses.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinated regional teams provide more reach in the service area and lay the foundation to implement transformational relationship approaches with businesses.</td>
<td>Siloed interactions may create loss of market penetration.</td>
</tr>
</tbody>
</table>

#### Recommendations

**Goal #2: Enhance regional collaboration among employer/business facing organizations to retain businesses in the area and increase job growth.**

**Objective 2.1:** By (insert date), WIBSCC and WSCC will have contributed to the growth of (insert number) jobs within the County among high growth sector businesses.
Strategies:
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- Add questions to the standardized needs assessment to continually ask businesses about workforce challenges and applicant skill shortfalls (See Appendix C).
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Key Metrics:
- Referrals among partners within the business engagement team to solve issues
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- Work share solutions executed to avert layoffs

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Strategies:
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- Use a standardized needs assessment to evaluate the ongoing skills gaps reported by businesses, locally and regionally (See Appendix C).
- Develop a feedback loop to provide data to sector strategy committees/groups to fully inform of the region’s needs using both the current research noted in the WIBSCC Strategic Plan and the ongoing results of the needs assessment.

Key Metrics:
- Metrics should be defined based on the sector strategies employed. Review the Jobs for the Future PowerPoint as an additional resource to identify sector strategy metrics. The WIBSCC can discuss these metrics to determine which are applicable for specific initiatives.
Section #5: COMMUNICATIONS: TRANSFORMATIONAL RELATIONSHIPS

How effective is the organization in developing a strong presence and conducting outreach to ensure that businesses value its services, information and resources? This section of the plan pertains to brand management, marketing and communications to achieve these goals.

Managing customers’ brand experiences is a proactive process in which systems are developed in accordance with customer needs and are monitored frequently, just as any other programmatic objectives. These systems are customer-centric versus funding-stream based. Every brand touch point is an opportunity to not only communicate with customers, but to consistently demonstrate the organizations’ value to its target audiences.

Business U conducted an evaluation of outreach processes asking WSCC staff and partners various questions pertaining to engagement efforts and communications. First, respondents were asked all of the ways in which they are engaging businesses with service offerings. The bar graph below denotes the responses on how business-facing organizations are currently conducting outreach.

**Current Business Outreach Tactics**

![Bar graph showing current business outreach tactics]

Additionally, the websites from each organization that participated in the interviews were evaluated based on the two following questions. Results from the interviews are depicted in the pie-charts below:

1) Does the website have a clear entry point for businesses?
2) Does the website contain specific calls to action for businesses?

**Website Evaluation Results**

![Pie chart showing website entry points]

No 43%  Yes 57%

![Pie chart showing website calls to action]

No 64%  Yes 36%
It is the opinion of Business U that most of the websites reviewed have a ‘government’ feel to them. They are informational, however limited with actionable opportunities for businesses to engage. If businesses know what they are looking for, they will most likely be able to find it, but for businesses that are unaware of the services offered through the County’s regional partnerships, they are more than likely to bounce off the sites quickly. There was no Google Analytic data available to verify bounce rates and usage of the sites.

Respondents were also asked about their use of social media (results are reported in the graph below). While the majority of organizations used at least one form of social media – the most popular being Facebook – several noted that: 1) they did not have control over the content; 2) the site was only used for job seekers and not for businesses; 3) and/or that they were not updating regularly. There is a need to integrate social media strategies into the overall Business Engagement Plan to make sure that platforms are in place to communicate with businesses over these networks.

**Social Media Platform Usage**

<table>
<thead>
<tr>
<th>Platform</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter</td>
<td>36%</td>
</tr>
<tr>
<td>Facebook</td>
<td>64%</td>
</tr>
<tr>
<td>LinkedIn Company</td>
<td>7%</td>
</tr>
<tr>
<td>LinkedIn Group</td>
<td>7%</td>
</tr>
<tr>
<td>LinkedIn Profiles</td>
<td>14%</td>
</tr>
<tr>
<td>Instagram</td>
<td>7%</td>
</tr>
<tr>
<td>Google+</td>
<td>7%</td>
</tr>
<tr>
<td>We don’t use social media</td>
<td>36%</td>
</tr>
<tr>
<td>Other - Write In</td>
<td>7%</td>
</tr>
</tbody>
</table>

**SWOT Analysis: Business Engagement Current State**

**Communications**

**Strengths**

57% of regional websites have entry points for business and industry.

While the majority of organizations use at least one form of social media – the most popular being Facebook – several noted that they did not have control over the content, and that it was only used for job seekers and not for businesses, or that they were not updating/posting regularly.

**Weaknesses**

64% of those surveyed have no calls to action for business and industry on websites and there are similar challenges with collateral materials.

Most of the websites are “very government” in look and feel with limited actionable opportunities for businesses to engage.
Opportunities

There is a need to integrate social media strategies into the overall Business Engagement Plan to make sure that platforms are in place to communicate with businesses over these networks.

57% of organizations have newsletters that can be used in a cross promotional strategy.

Professional development is required to help staff and partners understand how to develop effective target audience messaging for businesses.

Professional development is required to help staff and partners understand how to use third-party credibility to engage new prospective business customers.

A social media strategy should connect each organization’s platforms through following, shares, likes of content targeted just for business & industry.

A regional Business Engagement Network branded portal would provide a single point of entry for businesses in the region to all services and incentives.

WSCC Board can engage with the plan by delivering community presentations at chambers and associations.

Opt-in forms on websites would help develop a proactive data base and interest list of prospective businesses.

Threats

Loss of market potential.

Loss of business engagement opportunities.

Recommendations

Achieving market position requires a high degree of alignment to create consistent brand touch points—the place where customers connect with the brand. These can include human touch points such as face-to-face interactions, automated touch points like kiosks and voice response units, and virtual touch points in the form of a website and social media platforms. The sum of these interactions creates the experience and perception about the organization and directly affects a customer’s understanding and evaluation of a brand.

There are two overarching opportunities to reposition the organization to build market position among business and industry:

1) repositioning strategies on the organization’s website using B2B (business-to-business) tactics to communicate
2) developing a regional network of business services that is included in its portfolio of service offerings.

Because the recommendations require substantial narrative explanations, Business U has included the explanations upfront in this section, followed by a summary of additional Goals, Objectives, and Metrics that pertain to branding, marketing and communications.
Standardized Communications Toolkit

A standardized communications toolkit will support the organization’s efforts in B2B outreach that include the following items.

- **Fact Sheet** – a one-page electronic fact sheet using effective messaging, the business engagement mission statement, and a quick list of comprehensive services and value propositions for engagement with contact information.

- **Standardized PowerPoint Presentation** – a standard presentation that includes speakers’ notes which summarizes the focus and value of how the organization supports business and industry as a customer and partner.

- **Standard Virtual Touch Point Guide** – guidelines that standardize all voicemail messages and email bylines for the business engagement team members.

- **Customized Folders** – a customized folder to include fact sheets and leave behinds after a business engagement team member conducts the needs assessment.

Website Reframing

Appendix D illustrates an initial wireframe for a re-branding and repositioning the organization in the market as a valuable partner for business and industry.

B2B Social Media

As a starting place to create a robust online footprint, theWSCC’s staff and partners should have a fully completed LinkedIn profile. LinkedIn is an excellent tool for building a professional network and making connections with potential new business customers through existing contacts. The staff and partners should link to WIBSCC board members and each other, as well as network partners such as chambers, education and economic development. Consider developing a company specific page that focuses only on business services.

Given that it will be important to showcase expertise in understanding the needs of Santa Cruz County’s high growth sector businesses, blogs and Slideshare are also recommended as part of the social media mix. Blogs provide an opportunity to highlight data and knowledge of the region and work with partners across the region. Slideshare is an easy tool to post presentations and publications that expands organic search engine for the website.

Identify a central repository (e.g., Google Docs) for business engagement team members to upload content and promotional postings for distribution through the business-targeted social media accounts. Content items for example can include upcoming events, partner news from chambers and economic development, and data/tips pertaining to the region’s businesses.

All of the social media accounts associated with the organization can be housed in a Social Media Newsroom (SMN) with automated feeds from the latest posts. A SMN targets the news media and provides support for proactive public relations efforts. An example of a SMN is shown to the right.
**Campaigns & Success Stories**

*Word-of-mouth advocacy* is attributed to 20-50 percent of all brand recommendations. There are three types of content that should be included in sharing successes: 1) **educational content** to identify problems that are solved in order to appeal to prospective customers and funders or partners to engage with the brand; 2) **expertise content** showcasing the value of the solutions applied to the problem for business and industry; and 3) **evidence content** data or “the proof” in the overall impacts that the WSCC brand is making within the region.

Rather than going through the expense of building a storytelling back-end system to upload stories and innovations, there is a national workforce campaign that could be leveraged to showcase these successes led by the National Association of Workforce Boards (NAWB) called **Workforce Investment Works**. This model provides a very simple formula for capturing and sharing stories that are segmented by customer type such as business/industry; youth; and job seekers.

Noted below is an example of how success stories from the national campaign website housed by the National Association of Workforce Boards can flow automatically to a local organization’s website through a RSS feed. The WSCC could upload stories to the national website with a feed going into the WSCC website to display success stories to build third party credibility.

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**iFrame Referrals**

An iFrame is a graphic frame that is placed at the top of a website. It is used to demonstrate complex brand architectures as well as promote cross referrals to other organizations within a “parent company” or network brand. An example of an iFrame is the California Community Colleges Economic and Workforce Development programs (EWD)
as shown below—it includes multiple technical assistance, training, and partnership calls to action within ten high growth sectors.

As you can see to the right of this page, a website depicts a high growth sector (e.g., advanced manufacturing), which is associated with a sub-brand of the EWD, called the Centers for Applied Competitive Technologies (CACT). When a visitor clicks on one of the industry programs, they are taken to that sub-brand’s website; as an example, clicking on advanced manufacturing will take the visitor to the CACT website at [www.CACT.org](http://www.CACT.org). This allows for cross referrals among the sector programs and it generates additional traffic for all of the sector websites.

Based on website analytics for this strategy, during the past two years, the various sector programs averaged a 74 percent (74%) increase in cross referrals as a result of implementing an iFrame strategy.

This same strategy may be applied to the WSCC business engagement partners’ websites to cross promote their various services and resources. Moreover, this is another touch point to engage and inform business and industry.

**eMarketing**

Over the last few years, digital marketing has undergone a substantial transformation, becoming an increasingly important medium for creating an online brand experience. It is recommended that an eMarketing strategy is executed that grows a database of business customers for ongoing communications via a regular eNewsletter or eBlast updates.

Sections of a business eNewsletter could contain:
- High Growth Sector Updates
- Service and/or Resource Highlight of the Month
- Business Customer Success Story of the Month (promoting its ROI using a partner service(s))
- Sector Strategies
- Economic Development Incentives
- Educational Initiatives

**Public Relations**

A media kit can be developed and placed in the organization’s website Social Media Newsroom for reporters, along with press releases and social media releases that can be distributed to the news media. These communication pieces should be retooled as blogs and eNewsletter articles to build credibility and showcase the initiatives that support business and industry.

Additionally, traditional costs of media buying can be alleviated with the use of cause-related marketing. An example of this strategy is [noted at this link](#) (needs updating).

**Digital Media**

Communications trends in 2016 include a host of digital media strategies that can be considered for maximizing business engagement including the use of video to tell customer stories across multiple platforms and using digital media like eMagazines to showcase larger concepts and to increase impact on key audiences. Videos can be uploaded...
to the campaign website mentioned in the previous section (Workforce Investment Works) to feed into the organization’s website, added to eMarketing outreach efforts, and used in eMagazines. In addition, an eMagazine format allows for interactivity and could be used to showcase regional initiatives and partner contributions through infographics, calls to action and video messaging. An example of an interactive eMagazine for one of the California Community Colleges EWD initiatives may be viewed here [https://ca-hwi.org/hwi_studenthealth/](https://ca-hwi.org/hwi_studenthealth/)

**Goal #5. Prioritize and deploy marketing and communications strategies to build a highly recognized and utilized brand among Santa Cruz County’s regional businesses.**

**Objective 5.1:** By (insert date) the WIBSSC and WSCC will deploy a set of re-branding strategies to support the organization in building a strong market position among high growth sectors in Santa Cruz County.

**Strategies:**
- Discuss and agree upon a portal sitemap (see Appendix D for a Draft Site Map).
- Use an eMarketing system to capture opt-in contacts from the portal.
- Segment eMarketing lists based on Santa Cruz County’s high growth sectors.
- Create an eNewsletter template to highlight successes, stories, and solutions for high growth sector businesses.
- Develop a social media plan using B2B platforms such as LinkedIn and Twitter.
- Follow partner social media accounts and cross promote content.
- Develop a content management plan for eMarketing and social media.
- Create a launch press release for the portal with campaign announcements.
- Develop a media plan using cause-related marketing to alleviate the high costs of media buys.
- Create a communications toolkit for the board and staff to conduct community presentations including a 60 second commercial, customized folders and marketing materials, and key speaking points, including “elevator” pitches.

**Key Metrics:**
- Market position metrics including brand awareness, comprehension, value and usage.
- Referral sources of incoming new business customers
- Website analytics such as Google Analytics
- Social media analytics using a management tool such as HootSuite
- Click through and open rates for eMarketing campaigns
- Ad reach and visibility
- Leveraged funding through cause-related marketing
### Section #6: TECHNOLOGY: CUSTOMER RELATIONSHIP MANAGEMENT

This section of the plan provides an overview of current technology used to manage business relationships. Noted below is a graphical representation of key operational and outreach functions that technology should automate in order to support efficiencies both within workforce organizations and among its partner organizations.

![Technological Automation Diagram](image)

#### SWOT Analysis: Business Engagement Current State

**Technology**

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Based on the interview, four organizations within Santa Cruz County are using CRM technologies; these include NEOserra (widely used by SBDC nationally); Chamber WebLink (a common CRM tool for Chambers of Commerce); Salesforce.com (configurable CRM geared to for-profit organizations with defined sales cycles); and a proprietary MIS system used to track participants, but not businesses.</td>
<td>Half (50%) the organizations interviewed rely, at least partially, on excel spreadsheets to house business customer data and track interactions. Two reported using an Access database to track business customers. These are not effective tools to manage business relationships and are cumbersome to manage, monitor and measure.</td>
</tr>
<tr>
<td>Several other technologies were also in use:</td>
<td>Sources for the business contacts are not driven by business engagement outreach strategies. With the exception of website sign-up forms, many of these require one-to-one contact and/or data entry in order to build the database. Many are generated through business startup activities related to requirements such as permits, licensing, fictitious name, etc., while others are historical lists of past customers, which only shrink over time as staff turnover impacts the quality of the list. Respondents did have a good sense of the number of contacts; only two organizations did not have this answer available.</td>
</tr>
<tr>
<td>- SmartSheets (shared cloud-based spreadsheets)</td>
<td>- MailChimp (used to house business contact database)</td>
</tr>
<tr>
<td>- MailChimp (used to house business contact database)</td>
<td>- Outlook email (used to house business contacts)</td>
</tr>
<tr>
<td>- City records (stored in proprietary system)</td>
<td>- Evernote</td>
</tr>
<tr>
<td>The number of business contacts median was 750 with the least being 42 and the most being 2000+.</td>
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</tr>
</tbody>
</table>

#### Opportunities

Organize efforts around a single CRM platform and/or one that has modern API capabilities in order to connect the system(s) for managing, monitoring and measuring business engagement to support a regional approach.

#### Threats

Duplication of effort.

Lack of reporting collectively in the region to manage and monitor goals and objectives.
Recommendations

Goal #6. Convene partners to discuss current CRM tools, costs (shared), benefits, and shortfalls.

Objective 6.1: By (insert date), identify a common CRM platform to manage, monitor and measure business engagement.

Strategies:
- Develop a list of key technology features that are of high value for partners.
- Identify workflow processes that can be automated based on standardized protocols and referral processes.

Key Metrics:
- Automation of metrics include:
  - market penetration
  - types of business engagement activities
  - referrals among partners
  - customer satisfaction
Section #7: PROFESSIONAL DEVELOPMENT: SKILL REQUIREMENTS

This section identifies the necessary skills of a high performing business engagement team to help ensure that there is a professional development plan in place to build capacity.

It is difficult to shift from working with job seekers (supply side) or even hunting for job orders to engaging a business as a customer and partner (demand side) using consultative sales techniques—these two customer groups require completely different practitioner skills and operational processes. Professional development is a critical component to support outreach efforts, and equally important, to train business services team to have the skills businesses expect.

If the business engagement team does not make a great first impression, then businesses will certainly question the team’s ability to help them find the “right” talent to increase productivity and grow their businesses. Along with the important skill sets you need in a job description (Table 2) and the skills and ability to implement activities needed on the job (Table 3), a successful business services’ team also incorporates the following six relationship building guiding principles in their day-to-day engagement practice as noted in the graphic on the right of this page.

### Table 2. Skill Sets

<table>
<thead>
<tr>
<th>Business Engagement Skill Set: Job Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent written and oral communication</td>
</tr>
<tr>
<td>Ability to use technology including a CRM platform</td>
</tr>
<tr>
<td>Provide customer service in a manner that exemplifies the organization’s values</td>
</tr>
<tr>
<td>Employ sales techniques that focus on building long term relationships with business and industry</td>
</tr>
<tr>
<td>Ability to form partnerships and maintain on-going relationships with community partners and employers</td>
</tr>
<tr>
<td>Ability to leverage regional resources</td>
</tr>
</tbody>
</table>

### Table 3: Business Engagement Activities

<table>
<thead>
<tr>
<th>Business Engagement On the Job Skills &amp; Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a list of key data points needed for business engagement outreach.</td>
</tr>
<tr>
<td>Design and use a needs assessment with the required elements to identify key challenges and solutions to build sustainable business relationships.</td>
</tr>
<tr>
<td>Identify regional strategies that enhance communication, coordination, and the collaborative alignment of education, workforce, and economic development.</td>
</tr>
<tr>
<td>Explain the main differences between a “solutions” and a “show and tell” selling approach.</td>
</tr>
<tr>
<td>Engage business using consultative selling.</td>
</tr>
<tr>
<td>Examine technology strategies that are best used for engaging business as a customer or partner.</td>
</tr>
<tr>
<td>Apply labor market data to inform decision making and business engagement action plans.</td>
</tr>
<tr>
<td>Identify psychographic data points that provide objective details about key motivators to move a business or employer to take action with a workforce, education or economic development organization.</td>
</tr>
<tr>
<td>Demonstrate the five-step approach to engage an employer as a customer or partner effectively.</td>
</tr>
<tr>
<td>Implement systematic change to increase the capacity and coordination of regional partners to engage the business community.</td>
</tr>
<tr>
<td>Describe the elements required in a market responsive regional business engagement portfolio.</td>
</tr>
</tbody>
</table>
SWOT Analysis: Business Engagement Current State

Professional Development

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is a cultural will of staff to align with WIOA with a business engagement focus.</td>
<td>There needs to be operational processes, protocols and referral systems to ensure no duplication of effort among staff that manage various funding streams.</td>
</tr>
<tr>
<td>Staff and board members understand the importance of data collection.</td>
<td></td>
</tr>
<tr>
<td>There was excellent feedback from Board members during the Business U strategy session about what is most important to businesses when working with workforce organizations supporting transformational relationship building approaches.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Align cultural will of staff to align WIOA with operational processes.</td>
<td>Duplication of effort.</td>
</tr>
<tr>
<td></td>
<td>Lack of reporting collectively in the region to manage and monitor goals and objectives.</td>
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</tbody>
</table>

Recommendations

It is recommended that Business U support WSCC’s business engagement team members and their partners in enhancing their skills through its Business Engagement Boot Camp learning event. The event will be tailored to align with the adopted strategies within the Business Engagement Plan and to support the successful execution of performance outcomes.

Recommendations 7.1

Business U recommends a professional development event to support the WSCC in carrying out the strategies for business engagement as directed by the WIBSCC.

Goal #4: Build the capacity of the business engagement team that aligns with a culture and operational structure that supports and implements both transactional and transformational relationship building approaches with regional employers and businesses.
Objective 4.1: By (insert date), the WIBSCC will host a professional development event.

Strategies:
- Identify potential community and regional partners to join the business engagement team and its coordinate outreach efforts.
- Include/invite community and regional partners to professional development business engagement events to align, share, and develop collective goals.
- Deploy the business engagement self-assessment, and aggregate data to pinpoint professional development opportunities for team members and regional engagement partners to build capacity (see Appendix D).
- Ensure that a standardized set of protocols and processes are agreed upon in order to coordinate efforts and key outcome of any professional development event.

Key Metrics:
- The number of referrals provided to partner organizations to solve business challenges
SUMMARY ACTION PLAN: TACTICAL EXECUTION

To summarize the recommendations found in each of the Business Engagement Plan’s seven Sections, Business U is submitting an action plan and timeline below to be discussed further with the WIBSCC Board, Business Services Committee, and the WSCC team members to identify additional priorities and to rate each one accordingly.

<table>
<thead>
<tr>
<th>Priority Level</th>
<th>Business U’s Recommended Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Priority</td>
<td>1st Quarter (7/1/16 – 9/30/16)</td>
</tr>
<tr>
<td>Medium Priority</td>
<td>2nd Quarter (10/1/16 – 12/31/16)</td>
</tr>
<tr>
<td>Low Priority</td>
<td>3rd/4th Quarter (1/1/17 – 6/30/17)</td>
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</table>

Summary Action Plan

<table>
<thead>
<tr>
<th>Goals</th>
<th>Objectives</th>
<th>Strategies</th>
<th>Priority</th>
</tr>
</thead>
</table>
| Goal #1 Improve the market position of WSCC among high growth sector businesses within Santa Cruz County. | Objective 1.1: By (insert date), WSCC will improve awareness of its services, solutions and strategies among high growth sector businesses by (insert percentage).  
Objective 1.2: By (insert date), WSCC will improve its market penetration rate among high growth sector businesses by (insert percentage).  
Objective 1.3: By (insert date), WSCC will improve brand equity among high growth sector businesses by achieving a customer satisfaction rating of (insert rating expectations) with (insert percentage) or more of its current customers. | Leverage the Capitola Merchant Survey to capture a baseline assessment of WSCC’s market position.  
Create a standardized needs assessment to capture market positions (see Appendix C).  
Create a baseline of market penetration rates among high growth sectors in Santa Cruz County (see Appendix B). | High Priority |

| Goal #2 Enhance regional collaboration among employer/business facing teams to retain businesses in the area and increase job growth. | Objective 2.1: By (insert date) WSCC will have contributed to the growth of (insert number) jobs within the County among high growth sector businesses. | Identify a list of high growth sector businesses for outreach.  
Use a standardized needs assessment (Appendix C) to:  
1. evaluate barriers standing in the way business growth  
2. continually evaluate skills gaps issues  
3. identify job growth projections  
4. support businesses with layoff aversion.  
Convene partner organizations that interface with business and industry to develop a standardized protocol for referrals, feedback, and follow-up to businesses; and to cross refer to partners to solve businesses immediate growth challenges.  
Work with entrepreneurs to grow employment opportunities. | Medium Priority  Low Priority |
<table>
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<tr>
<th>Goals</th>
<th>Objectives</th>
<th>Strategies</th>
<th>Priority</th>
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</thead>
<tbody>
<tr>
<td><strong>Goal #3</strong>&lt;br&gt;Design sector strategies and career pathways with high growth sectors and emerging sectors to solve key industry needs.</td>
<td>Objective 3.1: By (insert date), WSCC will identify skills gaps in the region.</td>
<td>Use current research on file to see what types of questions need to be posed to business and industry to validate skills gaps.</td>
<td>&lt;br&gt;<img src="green.png" alt="Green" /> &lt;br&gt;Low</td>
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<td></td>
<td>Objective 3.2: By (insert date), WSCC will identify the sector strategies to address skills gaps in the region.</td>
<td>Use a standardized needs assessment to evaluate the ongoing skills gaps of regional businesses (See Appendix C).</td>
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<td>Develop a feedback loop to provide data to sector strategy committees/groups to keep them informed about the region's needs.</td>
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<td><strong>Goal #4</strong>&lt;br&gt;Build the capacity of the business engagement team to align culturally and operationally by implementing transactional and transformational relationship building approaches with regional employers and businesses.</td>
<td>Objective 4.1: By (insert date), WSCC will host a professional development event.</td>
<td>Identify a list of partners to include on the business engagement team.</td>
<td>&lt;br&gt;<img src="orange.png" alt="Orange" /> &lt;br&gt;Medium</td>
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<td>Implement the business engagement self-assessment tool (Appendix E).</td>
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<td>Review self-assessment tool results and develop curriculum that supports the desired outcomes.</td>
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<td>Ensure that a standardized set of protocols and processes are key outcomes of the event.</td>
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<tr>
<td><strong>Goal #5</strong>&lt;br&gt;Prioritize and deploy marketing and communications strategies to build a highly recognized and utilized brand among Santa Cruz County's regional businesses.</td>
<td>Objective 5.1: By (insert date) WSCC will deploy a set of re-branding strategies to support the organization in building a strong market position among high growth sectors in Santa Cruz County.</td>
<td>Discuss and agree upon a portal sitemap (see Appendix D for a Draft SiteMap).</td>
<td>&lt;br&gt;<img src="orange.png" alt="Orange" /> &lt;br&gt;Medium</td>
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<td>Utilize an eMarketing system to capture opt-in contacts from the portal.</td>
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<td>Segment eMarketing lists based on Santa Cruz County's high growth sectors.</td>
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<td>Create an eNewsletter template to highlight successes, stories, and solutions for high growth sector businesses.</td>
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<td>Follow partner social media accounts and cross promote content.</td>
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<td></td>
<td>Develop a content management plan for eMarketing and social media.</td>
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<td>Create a launch press release for the portal and campaign announcement.</td>
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<tr>
<td>Goal #6</td>
<td>Objective 6.1: By (insert date) WSCC identify a common CRM platform to manage, monitor and measure business engagement.</td>
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</tr>
<tr>
<td>Convene partners to discuss current CRM tools, costs (shared), benefits and shortfalls.</td>
<td>Develop a media plan using cause-related marketing to alleviate the high costs of media buying. Create a communications toolkit for the board and staff to conduct community presentations including a 60-second commercial, customized folders, marketing materials with key speaking points including an elevator pitch.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Develop a list of key technology features that are of high value for partners. Identify workflow processes that can be automated based on standardized protocols and referral processes.</td>
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</tbody>
</table>

**NEXT STEPS: REVIEW WEBINAR**

Business U recommends the following next steps:

1. Schedule a webinar briefing with the WIBSCC board, its designated staff, and the partners from WSCC to review the Summary Action Plan recommendations.

2. Due to the simultaneous release (June 30, 2016) of the final regulations for the Workforce Innovation and Opportunity Act and the submission of the Business Engagement Strategic Plan, Business U will also review during the webinar how the plan aligns with the final rules that pertain to employer and business engagement.

3. Schedule a call with Andy Stone and Sara Paz-Nethercutt to discuss implementing Phase Two of the WIBSCC Business Engagement Strategic Plan.
Appendix A
WIOA Fact Sheet

(Note the Next Steps on page 31 above regarding the release (June 30, 2016) of the final regulations for the Workforce Innovation and Opportunity Act and the simultaneous submission of the Business Engagement Strategic Plan.)

The Workforce Innovation & Opportunity Act (WIOA), “is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy.”

Local Board Role

- Serves as a strategic convener to promote and broker effective relationships between the Chief Local Elected Official(s) and economic, education, and workforce partners throughout the local area.
- Responsible for developing a strategy to continuously improve and strengthen the workforce development system through innovation in, and alignment and improvement of, employment, training, and education programs to promote economic growth.
- Board Members must actively participate and collaborate closely with the required and other partners of the workforce development system, including public and private organizations. This is crucial to the Local Board’s role to integrate and align a more effective, job-driven workforce development system.

Local Board: Five New Functions & Duties

| Career pathways development with education to lead efforts in the local area |
| Identification and dissemination of proven and promising practices |
| Technology to enhance accessibility and effectiveness of services |
| Coordination with education and training providers |
| Accessibility for individuals with disabilities |

Expanded Board Functions & Duties

- **Workforce Research and Regional Labor Market Analysis**
  Expanded to: “Carry out analyses of the economic conditions in the region” and “to conduct research, data collection and analysis on the workforce needs of the regional economy.”

- **Employer Engagement**
  Expanded to: “Ensure activities meet the needs of Employers” and “to Develop and Implement proven and promising strategies to meet employment and skill needs”

- **Convening, Brokering and Leveraging**
  Previously stated: “Connecting, Brokering and Coaching”
• Program Oversight
  Adds: “Ensure appropriate use and management of funds”

• Selection of Operators and Providers
  Adds: “Consumer Choice” requirements

Additional Board Responsibilities

- Application for initial designation of local area
- Develop, convene and implement industry or sector partnerships
- Regional coordination and planning, including submission of a regional plan
- Integrated employment opportunities to persons with disabilities

Standing Committees

- WIOA authorizes Boards to establish standing committees (SC)
- Encourages the use of SC to expand opportunities for stakeholders to participate in board-decision making, particularly for representatives of organizations that may no longer sit on the Local Board but continue to have a stake in the success of board decisions.
- Committees expand the capacity of the board in meeting required functions.
- May establish standing committees that include individuals who are not formal members of the board, but who have expertise to advise on issues that support the board’s ability to attain the goals of the State, local and regional plans, and the objective of providing customer focused services to individuals and businesses.
- Standing committees must be chaired by a member of the Local Board.

DOL Encourages Three Standing Committees (other standing committees identified and appointed by the CLEO)

1. Standing committee to provide information and assist with operational and other issues relating to the one-stop delivery system
2. Standing committee to provide information and to assist with operational and other issues relating to the provision of services to individuals with disabilities
3. Youth Standing Committee

Notable Changes from WIA to WIOA

- Prioritizes services to out-of-school youth and expands eligibility
- Emphasis on training and subsidized work experiences for both adults and youth in in-demand occupations with career pathways in high growth industries
- Establishes common performance measures
- A national brand for use by the workforce system
✓ Use of technology to access services

✓ **Streamlines board composition and structure with changes in name (WIB to WDB), mandated members, roles and responsibilities**

✓ Designation of regions and regional coordination: local boards engage in regional planning culminating in a regional plan; regional service delivery strategies, sector initiatives; delivery of workforce development services based on data (i.e., labor market and economic intelligence); and the establishment of a regional administrative cost-sharing arrangement.

✓ Greater alignment with economic development and education to drive a collective response to labor market challenges.

✓ Prioritizes an employer-centric system: employer engagement strategies to strengthen business services.

✓ Expands the workforce system to include 4 core programs: integration with EDD (Wagner-Peyser), adds Temporary Assistance for Needy Families (TANF) and others as partners with mandated cost-sharing requirements. Aligns youth and adult performance.

**Business U: Recommendations – additional roles**

<table>
<thead>
<tr>
<th><strong>WIBSCC Business Engagement Role</strong></th>
<th><strong>WSCC Business Engagement Role</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Use regional data to identify business’ key challenges related to retention and growth.</td>
<td>Use the Standard Needs Assessment as a daily practice when consulting with businesses to identify immediate needs. Note: aggregating assessment data from sectors will also serve to anticipate possible challenges providing the business engagement team with the local knowledge they need to find solutions.</td>
</tr>
<tr>
<td>Identify key sector strategies and desired outcomes.</td>
<td>Provide WIBSCC with real time data from needs assessments to help make informed decisions.</td>
</tr>
<tr>
<td>Serve as brand ambassadors and conveners by engaging and connecting other businesses in the region with the WSCC services, resources and incentives.</td>
<td>Interact in the field with business and industry with services and solutions.</td>
</tr>
<tr>
<td>Identify and approve business engagement strategies for the WSCC.</td>
<td>Carry out the business engagement strategies as identified by the WIBSCC</td>
</tr>
</tbody>
</table>
## Appendix B

### Business Engagement Scorecard

**Alignment of Goals & Objectives with Metrics**

<table>
<thead>
<tr>
<th>Goal</th>
<th>Objectives</th>
<th>Metrics</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal #1</strong></td>
<td>Improve the market position ofWSCC among high growth sector businesses within Santa Cruz County.</td>
<td>Objective 1.1: By (insert date), WSCC will improve awareness of its services, solutions and strategies among high growth sector businesses by (insert percentage).&lt;br&gt;&lt;br&gt;Objective 1.2: By (insert date), WSCC will improve its market penetration rate among high growth sector businesses by (insert percentage).&lt;br&gt;&lt;br&gt;Objective 1.3: By (insert date), WSCC will improve brand equity among high growth sector businesses by achieving a customer satisfaction rating of (insert rating expectations) with (insert percentage) or more of its current customers.</td>
<td>Initial baseline from Capitola Merchant Survey: Overall &amp; By Sector&lt;br&gt;&lt;br&gt;Needs Assessment Results: Overall &amp; By Sector&lt;br&gt;&lt;br&gt;Baseline and ongoing market penetration rates of current business customers and/or partners: Overall &amp; by Sector&lt;br&gt;&lt;br&gt;Customer Satisfaction Surveys: Overall &amp; by Sector</td>
</tr>
<tr>
<td><strong>Goal #2</strong></td>
<td>Enhance regional collaboration among employer/business facing teams to retain businesses in the area and increase job growth.</td>
<td>Objective 2.1: By (insert date) WSCC will have contributed to the growth of (insert number) jobs within the County among high growth sector businesses.</td>
<td>Referrals among partners within the business engagement team to solve issues:&lt;br&gt;&lt;br&gt;# Received&lt;br&gt;&lt;br&gt;# Given&lt;br&gt;&lt;br&gt;Outcomes of Service&lt;br&gt;&lt;br&gt;# Job placements by high growth sector.&lt;br&gt;&lt;br&gt;# Job placements with entrepreneurs.&lt;br&gt;&lt;br&gt;# Layoffs Averted</td>
</tr>
<tr>
<td>Goal</td>
<td>Objectives</td>
<td>Metrics</td>
<td>Data Sources</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td><strong>Goal #3</strong>&lt;br&gt;Design sector strategies and career pathways within high growth sectors and emerging sectors to solve key industry needs.</td>
<td>Objective 3.1: By (insert date), WSCC will identify skills gaps in the region.&lt;br&gt;Objective 3.2: By (insert date), WSCC will identify the sector strategies to address skills gaps in the region.</td>
<td>Metrics should be defined based on the sector strategies undertaken. Jobs for the Future PowerPoint can be used as a guideline for future discussions.</td>
<td>Data captured by working with individual companies</td>
</tr>
<tr>
<td><strong>Goal #4</strong>&lt;br&gt;Build the capacity of the business engagement team to align culture and operations to implement both transactional and transformational relationship building approaches with regional employers and businesses.</td>
<td>Objective 4.1: By (insert date), WSCC will host a professional development event.</td>
<td>Referrals among partners within the business engagement team to solve issues:&lt;br&gt;# Received&lt;br&gt;# Given&lt;br&gt;Outcomes of Service</td>
<td>Data captured by working with individual companies</td>
</tr>
<tr>
<td><strong>Goal #5</strong>&lt;br&gt;Prioritize and implement marketing and communications strategies to build a highly recognized and utilized brand among Santa Cruz County’s regional businesses.</td>
<td>Objective 5.1: By (insert date) WSCC will deploy a set of re-branding strategies to support the organization in building a strong market position among high growth sectors in Santa Cruz County.</td>
<td>Market position metrics including brand awareness, comprehension, value and usage.&lt;br&gt;Referral sources of incoming new business customers&lt;br&gt;Website analytics&lt;br&gt;Social media&lt;br&gt;Click through and open rates for eMarketing campaigns&lt;br&gt;Advertising&lt;br&gt;Leveraged funding through cause-related marketing</td>
<td>Needs Assessment&lt;br&gt;Needs Assessment&lt;br&gt;Google Analytics&lt;br&gt;HootSuite Analytics&lt;br&gt;eMarketing platform or CRM&lt;br&gt;Reach &amp; Visibility per media outlet&lt;br&gt;Dollar amount discounted by media and/or in-kind donations</td>
</tr>
<tr>
<td><strong>Goal #6</strong>&lt;br&gt;Convene partners to discuss current CRM tools, shared costs, benefits and desired features.</td>
<td>Objective 6.1: By (insert date) WSCC identify a common CRM platform to manage, monitor and measure business engagement.</td>
<td>Referrals among partners within the business engagement team to solve issues:&lt;br&gt;# Received&lt;br&gt;# Given&lt;br&gt;Outcomes of Service</td>
<td>Data captured by working with individual companies</td>
</tr>
</tbody>
</table>
# Appendix C
## Standardized Needs Assessment

<table>
<thead>
<tr>
<th>General Information: Research (Web/Search)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce Organization</td>
</tr>
<tr>
<td>Name of Business</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>General Phone Number</td>
</tr>
<tr>
<td>Website Address</td>
</tr>
<tr>
<td>Primary Contact: Name</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Direct Phone Number</td>
</tr>
<tr>
<td>Secondary Contact: Name</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Direct Phone Number</td>
</tr>
<tr>
<td>Initial Visit Date</td>
</tr>
<tr>
<td>Outreach Representative</td>
</tr>
<tr>
<td>Type of Business (NAICS Code)</td>
</tr>
<tr>
<td>Single Location or Multiple Sites</td>
</tr>
<tr>
<td>Repeat Customer or First Time Consultation</td>
</tr>
<tr>
<td>Referral Source</td>
</tr>
<tr>
<td>Number of Employees Currently</td>
</tr>
<tr>
<td>Number of Employees last year</td>
</tr>
<tr>
<td>Current Employee Retention Rate</td>
</tr>
<tr>
<td>Tour Scheduled</td>
</tr>
<tr>
<td>Tour Completed</td>
</tr>
</tbody>
</table>

**Probing Questions**

- What are your business plans for growing your company?
- What has been the greatest challenges facing your company in the past six months?
- What about your company’s greatest achievement?
- Are the projected employment needs of your business increasing, stable, or decreasing?
- Where do you get information about your industry?
Where you see the most growth occurring within your organization?

What are your immediate business needs?

What are your immediate workforce needs?

Many of our clients are experiencing problems with X. How is this affecting your organization?

What’s holding your organization back from reaching its revenue/profit/production goals?

**Career Pathway Probing Questions**

What policies most affect your industry?

What are the skills gaps you’ve identified with your workforce?

What opportunities does your company have to get in front of your future workforce to promote your industry and your company?

**Market Position Probing Questions**

**Brand Awareness**

Prior to my contacting you, had you ever heard about our organization?
- Yes (go to next question)
- No
- Maybe

**Referral Source**

How did you learn about our services?
- Website
- Social Media: ___________
- Advertising: ___________
- Other: ______________

**Brand Comprehension**

What do you know about our organization?

**Brand Usage**

Have you engaged with our organization before?
- Yes (go to next question)
- No

**Brand Value**

What has been your past experience with our organization?

**Competitor Question**

1. What services do you historically use to meet your workforce needs?
2. Has the service been effective? If not, why not?

**Business Cycle Questions: Company Specific**

Where do you see the most growth in your company and why? (Research the company before your first visit to organize your questions not easily obtained on the company’s website)

What are your new ventures or future growth plans?

Do you want to expand? When? What’s holding you back from reaching these goals?

What keeps you up at night in terms of meeting your organization’s mission or goals?
### Communication Preferences

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your preference when it relates to follow up communications with me/my organization?</td>
<td></td>
</tr>
<tr>
<td>Is there a best time during the day to connect with you?</td>
<td></td>
</tr>
<tr>
<td>How do you want me to contact you to share industry information?</td>
<td></td>
</tr>
<tr>
<td>Would you like me to periodically email you industry information?</td>
<td></td>
</tr>
</tbody>
</table>

### Additional Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are your best sources for qualified candidates?</td>
<td></td>
</tr>
<tr>
<td>Many of our customers are experiencing problems with “X”. How is this affecting your organization?</td>
<td></td>
</tr>
<tr>
<td>What is your employee retention plan?</td>
<td></td>
</tr>
<tr>
<td>What can I/my organization do to help you meet your goals/succeed?</td>
<td></td>
</tr>
<tr>
<td>How will the minimum wage increase affect your organization/business/company?</td>
<td></td>
</tr>
<tr>
<td>How has the drought affected your business?</td>
<td></td>
</tr>
<tr>
<td>What resources do you access to get candidates for your open positions?</td>
<td></td>
</tr>
<tr>
<td>What else would you like me to know about your company/business/organization?</td>
<td></td>
</tr>
<tr>
<td>Do you have a wish list of support services to help make your organization run more efficiently?</td>
<td></td>
</tr>
<tr>
<td>How are you growing your workforce?</td>
<td></td>
</tr>
<tr>
<td>What are the employee qualities that you would like to foster?</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
Current Website

Embedded in County Site
Brand architecture not clear
Modernize design needed: logos & website
Text Heavy
Value Propositions & Calls to Action missing
Recommended Site Map
WSCC Entry Point
www.WSCC.org

Recommended Site Map
WIBSCC Entry Point
www.WIBSCC.org

*Our Board = This goes to a microsite for the WIBSCC – see next slide
## Appendix E
### Business Engagement Self-Assessment

Reflect on each statement below and check the appropriate box as it relates to your current business engagement behaviors and activities.

<table>
<thead>
<tr>
<th></th>
<th>Agree</th>
<th>Disagree</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Most of my business customers are disengaged and are not giving me the buy-in I need to move my agenda forward.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Most of my interactions with employers are compliance-driven.</td>
<td></td>
<td></td>
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<tr>
<td>3</td>
<td>My business customers believe that I have their best interest at heart.</td>
<td></td>
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<tr>
<td>4</td>
<td>My business customers trust my expertise to help solve their issues.</td>
<td></td>
<td></td>
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<tr>
<td>5</td>
<td>I agree that to build trust and credibility with current/potential customers I need to reduce my expectations when meeting with them, even if that means walking away without checking any items on my agenda.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>I make a concerted effort to increase my interactions with businesses even if they’ve communicated that they don’t have a current need for any of my services.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>If I want my business customers to respond to me differently, then I have to change my approach and engagement strategies.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>I have taken an inventory of my existing business relationships and what I need to do to build a deeper, trust-worthy and credible relationship.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>I believe that businesses are more motivated in partnering with those workforce and education organizations who understand market-driven principles to ensure the resources they’re expending are minimized and used strategically.</td>
<td></td>
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</tr>
<tr>
<td>10</td>
<td>I examine data so that I can share insights with my business customers about their sector.</td>
<td></td>
<td></td>
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<tr>
<td>11</td>
<td>I measure what is important to my business customer regardless of whether my funding stream requires it.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>After I meet with an employer, I believe that I have shared valuable information that will support the business in its overall goals.</td>
<td></td>
<td></td>
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<tr>
<td>13</td>
<td>I use a list of standard questions that I ask every prospective business customer.</td>
<td></td>
<td></td>
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<tr>
<td>14</td>
<td>I can successfully uncover challenges or conflict with my business customers so that it results in an opportunity to proactively provide additional services to help meet their overall business goals.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>I make an effort to speak the language of business.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>When approaching a new business, I craft an opening statement that includes some fact as to how my organization’s mission aligns with something that is important to their business.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>I believe that my current business customers are experiencing &quot;compassion fatigue&quot; as a result of being approached by similar missions and agendas from other organizations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>I make a point of building more than one relationship within any given organization.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>I can articulate my customers’ current business goals and what they want to achieve in the next one to three years.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>My actions communicate that I have an understanding of my business customers’ current issues and are committed to finding solutions to help solve their problems, even if that means partnering with other organizations.</td>
<td></td>
<td></td>
</tr>
</tbody>
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