Strategic Planning Workshop

National Template

Center For ENERGY Workforce Development

Date updated: 11-01-2016

Table of Contents

Please find all of the materials available for download on the CEWD website at:

www.cewd.org/wizard/consortium/strategic-planning-materials.php

Overview of the Process

Prepare to Establish or Re-energize a State Energy Workforce Consortium

Regardless of whether the company is looking to establish a new State Energy Workforce Consortium or whether the Consortium already exists but needs to be re-energized, the steps are similar. However, the steps necessary to make the decision to proceed may be slightly different. Let's look at both scenarios and how the discussion would be initiated.

Establishing a New State Energy Workforce Consortium

In order to establish a new State Energy Workforce Consortium, there needs to be an interest amongst the major utilities in the state to establish this Consortium. This can be done by bringing together representatives from each of the utilities to discuss the idea. These can be either human resources representatives or operations employees. However, one company will most likely lead the effort of bringing together, either face-to-face or by phone, the major utilities in the state to entertain the idea. When agreement exists amongst all or most of the companies that a State Energy Workforce Consortium is worth pursuing, each company should begin the pre-work listed below.

Re-energizing a State Energy Workforce Consortium

Sometimes a State Energy Workforce Consortium loses momentum and feels stalled to its members. The reason may be that the Consortium has rallied around a project or grant that has ended and isn't sure what to work on next. Or the Consortium may have lost a chair or other members through organizational changes. Whatever the reason, if the Consortium already exists but needs to re-energize, developing a 3–5-year strategic plan can help refocus the Consortium on sustainable work with common goals and strategies. The utility members of the Consortium should meet in person or by phone to decide whether to pursue a strategic plan for their Consortium because industry must drive this process. When agreement exists with all of the companies that a 3–5-year strategic plan would add value, each utility company should begin the pre-work.

State Consortium Strategic Planning Process

	Industry Partners/ Executive Committee	Full Consortium	Task Forces
Pre-Meeting— 8 weeks prior to Workshop 1	If the state doesn't have a State Energy Workforce Consortium, a meeting to confirm the need should be held with industry partners. New/existing Consortium confirms need for a 3–5-year state-wide strategic workforce plan. Organize call/webinar to review pre-work required by all industry partners Industry partners prepare pre-work for Strategic Planning Workshop. Use the *Pre-Work Guide.* Plan workshop agenda; determine and invite stakeholders; identify location for workshop; manage logistics.		
Strategic Planning Workshop— Day 1		Industry partners discuss pre-work, review state of the industry, and review current and future demand trends. All hear from guest speakers about state of energy policy, workforce development, and education. Develop SWOT analysis, develop gap analysis, identify key areas of focus, and identify stakeholders. Set date for Day 2.	
Between Meetings— 8 weeks between Workshop Days 1&2	Develop draft vision/mission, discuss Consortium structure and support, discuss and identify potential Executive Sponsor, invite additional stakeholders, determine meeting logistics, and send out meeting invite for Day 2. Document meeting discussions, data, and flipchart notes. Send notes, along with meeting minutes, to full Consortium.		
Strategic Planning Workshop— Day 2		Review vision and mission, roles of Consortium members, and Day 1 outcomes. Confirm key areas of focus/objectives, break out into discussion groups, brainstorm strategies and actions to address key areas of focus, prioritize short-term and long-term strategies, and brainstorm measures for each strategic objective.	
Implementation		Identify task force leaders, join task forces, and develop meeting schedule.	

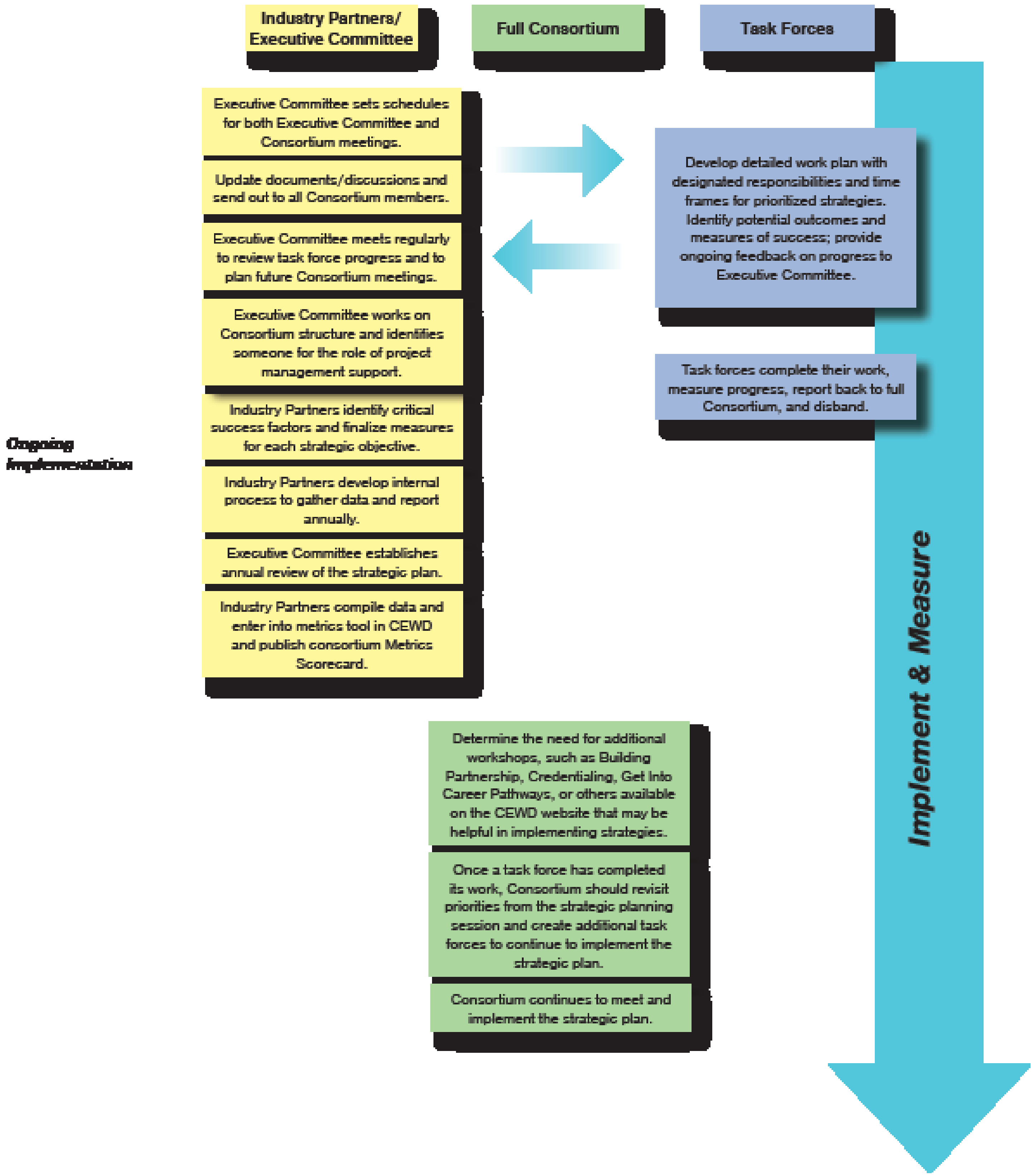
Plan

Build

Implement

State Consortium Strategic Planning Process Chart continued on next page

State Consortium Strategic Planning Process (continued)



I. Prepare

Pre-Work Summary

The planning phase of starting and/or strengthening a State Energy Workforce Consortium is designed to answer these questions:

- What are the company's current corporate strategies?
- How does the company workforce planning/development activities help to address the strategies?
- How can a State Energy Workforce Consortium focused on skilled craft, technical, and engineering roles enhance our current efforts or help us initiate new efforts?
- What are potential meaningful goals the company could reach as a result of involvement in the Consortium?
- What are the resources that will be required to be an active member of the Consortium?

This information will lead to the development of a 3–5-year strategic plan for the State Energy Workforce Consortium. Strategic planning generally answers three basic questions: Where are you now? Where do you want to be? And how will you get there? The pre-work helps to answer the first two questions and provides the foundation for management buy-in to the initiative.

Pre-Work Guide

Action 1: Determine the need for a State Energy Workforce Consortium/3–5-year strategic plan.

❑ **STEP 1 – Organize a call or meeting of industry partners to discuss.**

If there is no Consortium in existence, this is an opportunity to bring together all of the utilities in the state to discuss the interest in the creation of a Consortium. This can be done by inviting and organizing a conference call with all of the utilities. Use the *Consortia Business Case* as a guide in your discussion.

Once an agreement has been reached by the utilities, it is important to ensure that the right players are at the table. It would be a good time to ask if there are other members of their utility that should be involved in the Consortium. Are they the right company representatives to continue with this work? If not, they should provide a name and contact information for the next meeting.

❑ **STEP 2 – If there is agreement, schedule a call or webinar to discuss pre-work.**

If there is agreement amongst the utilities to proceed, a call or webinar should be scheduled to review and discuss the pre-work that will be needed in preparation for the Strategic Planning Workshop. Refer to Actions 2, 3, and 4 found in the Prepare section of this template.

❑ **STEP 3 – Determine a timeline for gathering data and holding a Strategic Planning Workshop.**

It is important to determine a date for the Strategic Planning Workshop. Companies should allow at least 8 weeks between the call and the workshop to allow for data gathering and preparation for the workshop.

Action 2: Determine company strategies that are driving recruitment and employment and assess the current state of workforce development at your company.

❑ **STEP 1 – Establish a cross-functional team that can gather data and make the case for involvement in the Consortium.**

Planning for the Consortium work at a company level should be done with a cross-functional team that includes, but is not limited to, individuals currently involved in recruiting (including military/veteran recruiting and college recruiting), as well as technical training, outreach, and workforce planning, who can help make the case for involvement in the Consortium and serve in an advisory capacity throughout the process. The first meeting of this cross-functional team is to begin the process of data collection by reviewing the data that will be required and determining who will gather this data outlined in Step 2 through Step 4 below.

There may be several meetings planned to review and analyze the data and determine next steps, and companies should allow enough time between the meetings for data gathering. The purpose of these sessions is not to create a detailed plan, but rather to scope out the gaps that can be filled by active involvement in the State Energy Workforce Consortium.

❑ **STEP 2 – Determine current workforce development and gaps.**

Complete an analysis of the current state for skilled craft, technical, and engineering jobs in your company. Put together background information on where the company stands now with regard to its workforce development efforts, e.g. identify hard-to-fills, recruit-to-hire ratio, cycle time to fill jobs, pass rate on employment tests, where in the screening process most candidates drop out, etc.

- Identify workforce development gaps by using the *Workforce Planning Interview Guide*. This can be done by interviewing the Recruiting and/or Diversity Leads, and/or Outreach.

❑ **STEP 3 – Conduct a demand analysis for key in-demand jobs.**

Download the *Demand Analysis Survey* and complete the survey to explore the following questions:

- What is the age and years of service of current workforce / retirement and attrition projections?
- What is the demand for hiring and in what specific jobs over the next 5 to 10 years?

❑ **STEP 4 – Review business strategies and impact on workforce.**

In order to understand the company business strategies and their impact on the workforce, interview various operations executives to better understand their concerns around the workforce in their business area. You may need to interview several operations executives, e.g. T&D, Generation Gas. Use the *Executive Interview Guide*.

Action 3: Define purpose and scope of your active involvement in the State Energy Workforce Consortium.

The purpose of the second meeting is to pull together the data that has been gathered in Action 1 and discuss how involvement in the State Energy Workforce Consortium could potentially enhance the company's current recruitment strategies.

❑ **STEP 1 – Review all of the data that has been gathered in Action 2 (Steps 2-4).**

Results of the interviews and all data gathered should be presented to the entire cross-functional team.

- Review gaps identified during the Workforce Planning Interviews.
- Review demand data and identify most critical jobs with greatest demand.
- Review results of Operations Executive Interviews.

❑ **STEP 2 – Conduct an analysis of the current state.**

Review and analyze the data and identify the critical areas around workforce development that are of concern to the company. Determine what the data is telling you about possible gaps or existing difficulties in recruiting and placement.

❑ **STEP 3 – Determine key areas of focus for involvement in the Consortium.**

Based on this data, determine the value of the company participation in the Consortium and key areas of focus for the Consortium work. This may be scheduled during a third meeting of the cross-functional team.

❑ **STEP 4 – Determine company business case for involvement in the Consortium.**

Identify the advantages and disadvantages of company involvement in a State Consortium.

Action 4: Determine company support and resource requirements for active involvement in the State Energy Workforce Consortium.

❑ **STEP 1 – Define who should make the decision on moving forward with active involvement in the State Consortium.**

Discuss who in the company would make the final decision on the company's participation in the Consortium. You want to make sure to get support from senior-level management for involvement and support of Consortium activities.

❑ **STEP 2 – Identify Company Consortium Representative(s).**

Identify who would be best to represent and speak on behalf of the company on Consortium issues and decisions. This decision can be based on the issues identified during the gap analysis. Operations is the client of the Consortium and may be best to represent their concerns. However, in many situations, Human Resources will act on behalf of the company. In addition, we suggest identifying at least one representative and one back-up. Identify potential time commitment needed to support the Consortium.

Action 5: Present plan to key executives.

❑ **STEP 1 – Develop talking points and presentation to management.**

Talking points should be developed and used by team members. The presentation to senior management/executives should make the business case and outline the results of the work done to date. Use *Consortia Business Case* as a guide, and *Consortium Business Case Summary* as a handout. The objective of the discussion is to gain executive involvement and support for his/her company's active participation in the State Consortium and reach an agreement on moving to the next step.

If the company has not been able to identify workforce development gaps for the business, they should consider the value of the company's involvement in a statewide Consortium effort. How can the company leverage the work of the Consortium? Consider "What can the Consortium accomplish better together than apart?" Remember, there is strength in numbers.

❑ **STEP 2 – Present the Business Case for State Energy Workforce Consortia.**

Present the Business Case to key executives to get involvement and support for active participation on the Consortium. (See *Consortia Business Case* and *Business Case Presentation to Executives as Guides* document.)

Action 6: Plan Day 1 of Strategic Planning Workshop.

The industry partners should begin preparing for Day 1 of the Strategic Planning Workshop, as well as beginning discussions on the governance of the Consortium.

❑ STEP 1 – Appoint a Chair and Co-Chair for the Consortium.

If you are establishing a new Consortium, and the industry partners involved up to this point have agreed to move forward, it is important to identify leaders who will be responsible for leading the Consortium prior to Day 1 of the Strategic Planning Workshop. The *Structure and Support: Building Sustainability in a State Energy Consortium* document can serve as a guide outlining the various duties and responsibilities of the various Consortium members.

❑ STEP 2 – Set up meeting logistics.

Determine a location and date for the Strategic Planning Workshop. Location of the meeting is important. Consider how far the stakeholders will need to travel to get to the meeting location. Is it centrally located and easy to get to? Ensure that the room is large enough to accommodate all of the expected attendees.

❑ STEP 3 – Identify guest speakers to participate in the Strategic Planning Workshop.

During the strategic planning process, it is important to understand not only the current state of the industry, but also the legislative environment and education environment in the state. It would be helpful to have representatives who can speak to the energy policy in the state, current workforce development initiatives, and how education is organized. To that end, plan to identify and invite three guest speakers, one for each area: energy policy, workforce development, and education. Allow approximately 20 minutes for each speaker, plus 10 minutes for questions and discussion.

An energy policy speaker should address the following questions:

- Does the state have an energy policy?
- Is there legislation in place or pending that will impact the industry's future direction?
- Are there existing programs or opportunities for partnership with the Consortium?

States vary in how their energy departments are structured. Doing a Google search to find the right contact should be pretty straightforward. If it is difficult to engage someone from the state, an alternative may be to have a state governmental affairs representative from one of the energy companies present this information.

A speaker from the state's Department of Workforce Development or from the governor's office on workforce initiatives should address the following:

- An overview of the state's direction and areas of focus around workforce development.
- Are workforce development or STEM a priority for the state? If so, what are the major initiatives currently in place or planned around these issues?

The state's Department of Education representative can provide an overview of career and technical education in the state, as well as current initiatives focused on this area. Having this person bring some type of flow chart to illustrate the structure would be ideal.

❑ **STEP 4 – Develop agenda and invite guests and stakeholders.**

- Develop an agenda for the Strategic Planning Workshop, and make arrangements for the facility and lunch.
- Invite guest speakers and other stakeholders. Send out invitations via email. In some cases, personal invites via phone should be made.

Other Stakeholders

Contractors who do utility work are facing similar workforce development issues, and should be considered potential stakeholders and invited to participate in the Consortium. This can be done for the first meeting, or further discussion can be held during the workshop and they can be invited to Day 2 of the workshop.

Contractors hire from the same pool of candidates. Each company should be asked to identify the large contractors that they work with regularly and reach out to them via phone to invite them to the Consortium meeting. The contractors should also consider getting support from their senior leadership and be prepared to discuss their workforce needs and gaps.

Education partners also play a key role in workforce development. Industry partners can identify the education partners they have worked with in creating energy specific programs and invite them to the workshop. These partners should be prepared to discuss their programs and how many typically graduate each year.

Additionally, if co-ops were not included at the outset of the data gathering, it may be advisable to invite them to the workshop, asking them to be prepared to discuss their workforce development issues and gaps.

Getting Ready Planning Template

Demand Data

Use *CEWD Demand Analysis Survey* to record the following information:

- What is the demand for hiring and in what specific jobs over the next 5–10 years?
- What is the age and years of service of current workforce/retirement and attrition projections?
- What are the current demographics for the company's recruiting pipeline?

Summary of the survey results: What are your critical jobs, and how many will be needed over

the next 5 years, and then over the next 10 years?

Use the *CEWD Workforce Planning Survey Demographic Job Category and Business Unit Definitions* to categorize the job classifications and complete the survey.

Workforce Gaps

Conducting an Operations Executive Interview will help link workforce needs with business strategy. The interview should identify business drivers and their impact on the workforce, and the future pipeline. (Use the *Executive Interview Guide*.)

Conduct interviews with your outreach, diversity, and recruiting organizations to identify gaps in filling positions and in building a future pipeline of qualified workers. (Use the *Workforce Planning Interview Guide* and *Metrics Tool* on the CEWD site.)

Summary of gaps that could be addressed with active involvement in the State Energy Workforce

Consortium:

Potential areas of focus or interest for Consortium involvement:

Potential Consortium Representative:

In order to make an effective decision/recommendation for the company to participate in the State Consortium, it is important to understand the advantages and disadvantages of participating in the Consortium. The team should spend some time identifying both the advantages/opportunities to the company as well as potential disadvantages or barriers to participating as an active member of the State Consortium.

Advantages/Opportunities	Disadvantages/Barriers

Who can make the decisions on moving forward?

II. Build

Develop a 3–5-year strategic plan during the Strategic Planning Workshop

Strategic Workforce Planning begins with the companies' business strategies and continues to a set of key workforce strategies, including strategies for workforce development. The Strategic Planning Workshop will apply the CEWD framework for Strategic Workforce Planning at the state level and will lead participants through a process of compiling workforce analytics, identifying areas of strategic focus, developing workforce development strategies, and creating an implementation and metrics plan. These strategies will guide the creation of a 3–5-year strategic plan that will enable a workforce that is the right size and has the skills and competencies to keep the businesses strong and competitive. A key outcome of workforce planning is to ensure a sufficient supply of qualified applicants, particularly in the in-demand skilled technician occupations. Participants will also identify key metrics for evaluating their workforce planning efforts.

Building a State Energy Workforce Plan: Day 1

Workshop Overview and Learning Objectives

Target Audience

Energy companies that are just forming a State Energy Workforce Consortium or a Consortium that is already in existence but needs to be re-energized and strengthened can use this process to develop a 3–5-year strategic plan.

It is assumed that the energy companies have discussed the opportunity to establish a new State Energy Workforce Consortium or to create a strategic plan for the Consortium's work at the state level. If they are all in concurrence, the industry partners should begin the pre-work in preparation for Day 1 of the Strategic Planning Workshop. (See Strategic Planning Workshop Pre-Work Guide found in the Prepare section of this template.) It is important to note that the energy industry in the state should be driving the process. They should engage education and workforce partners, as well as others, to begin the development of the strategic plan. However, the energy companies should remain in a leadership role.

PREPARE to Establish or Re-energize a State Energy Workforce Consortium

Prerequisites

Pre-work is required. See the Strategic Planning Workshop Pre-Work Guide (found in Section I: Prepare section of this template). A call or meeting should be held with the industry partners to review the pre-work requirements in preparation for the Strategic Planning Workshop.

Learning Objectives

Participants will:

- Understand the essential elements of workforce planning
- Define the key stakeholders in the workforce planning process
- Assess the current and future state of the environment for the energy industry and its impact on the State Consortium
- Determine key trends and workforce gaps for the industry
- Identify potential areas of focus for the Consortium work

Deliverables

After the completion of Day 1, the workshop leader will compile the information gathered, including an environmental scan of key state energy issues/game changers, documented workforce demand, key trends and workforce gaps, and documented priorities for the Consortium work. This will be distributed to participants no later than three weeks after the workshop. The workshop leader will also provide group members a date for Day 2 of the program, where the focus will be on agreeing on a vision and mission statement, identifying key areas of focus and key strategies, and developing a strategy document with action items and draft metrics.

Preparation: In Advance

Extensive advance preparation is required for this workshop. This includes explanation and distribution of pre-work to industry partners, collection of several reports, and the invitation to guest speakers. Details can be found in the Strategic Planning Workshop Pre-Work Guide. See the Strategic Planning Flow Chart on pages 5-6 for an overview of the process and timeline.

Pre-Work for Participants

Companies that will be participating in the workshop will prepare and present a business case within their company for participating in the State Energy Workforce Consortium. Through the years of helping states launch consortia, CEWD sees this step as essential for the Consortium to get off the ground and sustain momentum. Therefore, workshop participants will implement this step in advance of participating in the strategic planning process with the Consortium.

Objectives of Pre-Work:

- Ensure involvement and participation in the Consortium from company executives, particularly operations. (Use the *Consortia Business Case* and *Business Case Presentation to Executives* presentation.)
- Understand executives' views of company direction/game changers and workforce implications. (Use *Executive Interview Guide*.)
- Gather demand data and identify workforce gaps. (Use *CEWD Demand Analysis Survey* and *Workforce Planning Interview Guide*.)
- Gather enough data to determine potential areas of focus for each company for the Consortium work.

A webinar or face-to-face meeting of all the industry partners should be scheduled at least eight weeks in advance of the workshop to review the pre-work required and address any participant questions or concerns. Please see the Strategic Planning Workshop Pre-Work Guide for pre-work details. Participants should bring their completed templates to Day 1 of the workshop.

State Supply/Demand Reports

Run and bring copies of the state's demand reports, available at:
http://www.cewd.org/workforce/workforcedemand2013.php

Education Partners

If the Consortium is already established, the Education Partners should prepare for the Strategic Planning Session by gathering supply data for the energy-related programs offered by their school. (Use *Supply* template.)

Materials/Handouts

See the last section of this guide. Handouts should be copied in advance, along with a roster of workshop participants.

Preparation: Day of Workshop

Room Set-up: The ideal room set-up for the workshop is a hollow square.

A-V: Set up a projector and screen and load the PowerPoint presentation, *Strategic Planning for State Consortia: Day 1*.

Flipchart: Prepare a set of flipchart pages for the questions that will be discussed during the analysis. Two or three pages for each topic should be sufficient. Make sure you have either the kind of flipchart that has pages that are sticky or have masking tape on hand. Topics include:

- State of the Industry
- Current and Future Demand Trends (current, next 5 years, and 5-10 years)
- Workforce Gaps
- State Energy Policy/Philosophy
- Educational Support

A "Parking Lot" page should also be created and taped on the wall to record topics or ideas that are not directly relevant to today's workshop.

Schedule

15 Minutes — Introduction (Slides 1–4)

Use the PowerPoint slides *What is a Strategic Plan?* as a guide to explain the purpose of a strategic plan.

State the learning objectives for the program from the slides and that the focus of this first day is to assess the current and future state of the environment—to understand the conditions in which the Consortium will be operating before it develops its strategic plan. This will include sharing the business case pre-work completed by each person/company, contributing to an overall analysis for the state.

Next, explain the format for the workshop. This is a hands-on workshop where participants will work together as a large group as well as in small groups. All participants are expected to contribute since a State Energy Workforce Consortium is truly a group effort.

15 Minutes — Introduction (Slide 5)

Go around the room and have participants state their names, companies, role in the company, and where they see the state of the energy workforce in five years.

30 Minutes — Discussion of Pre-Work (Slide 6)

Spend the next 30 minutes having each company (if there is more than one representative from a company at the meeting, they should go as a group) share what their experience was in presenting the business case and getting buy-in for company involvement in the State Energy Workforce Consortium and strategic planning process. Use the following questions to guide the discussion and keep it focused. The idea is to discuss the experience, not to share the areas of focus the company developed, at this time.

1. Who attended your planning meetings?
2. What went most smoothly at the meetings? Was there any resistance or challenges?
3. What gaps were identified that can potentially be filled by the Consortium?
4. Discuss how the presentation to management went for you.

45 Minutes — State of the Industry (Slides 7-8)

Lead a large-group discussion on the State of the Industry based on the questions on the slide by the same name. Record answers on the appropriate flipchart page(s). Identify the game changers and workforce gaps for the industry based on the interviews with executives. In addition, each company should present other workforce gaps uncovered during the interviews. Examples may include pass rate of pre-employment tests, difficult positions to fill, and lack of employability skills. (Refer to *Executive Interview Guide* and *Workforce Planning Interview Guide*.)

15 Minutes — Break

60 Minutes — Current and Future Demand Trends (Slides 9-10)

This section should focus on current and future demand trends based on data the companies collected using the demand survey (attrition analysis), the Executive Interview questionnaire, and the demand reports run in advance of the workshop. Participants should present the data collected in the pre-work for their specific companies. In addition to demand data, you need to understand the timing of when the positions need to be filled. This information will help develop a good strategic plan. (Refer to *Data Gathered on CEWD Demand Analysis Survey*.)

Use the questions on the slide by the same name. Record answers on the appropriate flipchart page(s). Stress that you're not looking for exact numbers and you realize that numbers will change, but just areas of significance so that the State Consortium can decide where to focus its efforts and resources. By the end of this section, you should have a list of four or five key job areas, agreed to by the group as part of the facilitated process. In addition, you should have an idea of the approximate number of total hiring for each grouping as well as timing, such as next 5 years or 5-10 years out. The number is not as important as the magnitude of the number. (Are we looking at 20 openings per year or 100 per year?)

30 Minutes — State's Energy Policy/Philosophy (Slide 11)
The guest speaker on this topic should present for 20 minutes and allow 10 minutes for questions and discussion.

45 Minutes — Lunch (Slide 12)
The lunch period may be shortened or turned into a "working lunch" if discussion runs over in the morning.

30 Minutes — Workforce Development (Slide 13)
The guest speaker from the State Workforce Development office, or from the governor's office, should present for 20 minutes and allow 10 minutes for questions and discussion.

30 Minutes — Educational Support (Slides 14-15)
The guest speaker who will address how the state education system functions should present for 20 minutes and allow 10 minutes for questions and discussion.

If the educational partners were asked to complete a supply analysis, they should present their programs and number of graduates annually. This will expand the time necessary for this part of the agenda. Ask the group to address questions such as: Is there alignment between the jobs identified in the demand analysis and the supply data? Are there gaps?

Have other gaps been identified by the educational partners that must be considered, such as poor interviewing skills?

60 Minutes — SWOT Analysis (Slide 16)
Conduct a SWOT analysis. Use the questions found on the *SWOT analysis template*. Strengths and Weaknesses are internal to the Consortium, and Opportunities and Threats tend to be external to the Consortium. (Sample *SWOT Analysis Template Cheat Sheet* can be used as a guide to prompt participants.)

15 Minutes — Break

20 Minutes — Gap Analysis Discussion
Based on the discussions held throughout the day, ask the participants to summarize what they heard as the main issues and gaps, and capture them on a flipchart.

30 Minutes — Key Areas of Focus/Priorities

Based on these gaps, ask participants to identify key areas of focus for the Consortium over the next 3–5 years. There should be no more than five key areas of focus identified. The Consortium may also want to prioritize the areas of focus and identify the areas that need focus in the short-term.

Once these key areas of focus are identified, the Consortium can develop strategic objectives that can overlap multiple years, with various actions implemented to support the strategic objective. A sample strategic objective may be: "Increase the diversity of the applicant pool for technician positions." The action plan will most likely overlap several years.

30 Minutes — Stakeholder's Involvement (Slide 17)

Based on the key areas of focus, lead a large-group discussion on additional stakeholder involvement. Use the questions on the slide by the same name. Record answers on the appropriate flipchart page(s). Lead the group to create a list of stakeholders who are currently not in attendance at the meeting but should be included in the development of the strategic plan. Define who and how each additional stakeholder will be contacted. If anyone in the group has a relationship with a specific stakeholder, ask him/her to reach out to them after the workshop and invite them to the next meeting.

Other stakeholders to consider:

- Contractors
- Workforce System
- Educators
- Pipeline Organizations
- Construction
- Manufacturing

20 Minutes — Next Steps (Slide 18)

Summarize the day's discussion. Then, explain what will happen on Day 2 of the workshop—the next steps in the strategic planning process. Remind participants of their action item to contact the additional stakeholders.

Materials/Handouts

- PowerPoint Presentation: Strategic Planning for State Energy Consortia: Day 1
- State Demand Reports (run in advance by workshop leader)
- SWOT Analysis Template
- Agenda

You can find all of the materials available for download on the CEWD website at:
www.cewd.org/wizard/consortium/strategic-planning-materials.php

Pre-Work Guide II

After Strategic Planning Workshop Day 1, the industry partners should meet either face-to-face or via conference call to discuss outcomes of Day 1 and begin to plan for Day 2 of the strategic planning process.

During these meetings, industry partners will:

- Define Consortium structure and support for the Consortium, which includes naming the Executive/Steering Committee, identifying a potential Executive Sponsor, discussing the role of and options for project management support, and determining how often the Consortium will meet.
- Develop a draft vision/mission.
- Develop an agenda for Day 2 and send out invitations to Day 2 of the Strategic Planning Workshop and invite any new stakeholders.

These discussions may happen over several meetings between Strategic Planning Workshop Day 1 and Day 2.

Action 1: Reach consensus on Consortium structure and support.

It is important that the industry partners begin to define the structure of the Consortium and detail how they plan to work moving forward. Identifying the various roles within the Consortium will help ensure sustainability and provide clarity around the expectations for each of the roles.

❑ **STEP 1 – Agree on the Executive Committee membership.**

At the first meeting/conference call, the industry leaders should review the *Structure and Support: Building Sustainability in a State Energy Consortium* document and discuss the makeup of the Executive/Steering Committee. Determine what the standing committee will be called. Refer to the *Structure and Support: Building Sustainability in a State Energy Consortium* document for a description of the various roles in the Consortium. If additional members are identified, they should be contacted and invited to participate in future conference calls. It is important that the industry partners be aligned prior to engaging other key stakeholders on the Executive Committee. The industry partners should discuss the pros and cons of adding other stakeholders to this group at the outset. The Executive Committee drives the work of the Consortium and is the decision-making body, so it is strongly recommended that the majority of the Executive Committee membership come from industry.

❑ **STEP 2 – Identify an Executive Sponsor.**

The Executive Sponsor of the State Energy Workforce Consortium provides strategic and executive-level support to the Consortium as a representative of the energy industry and serves as a champion of the Consortium's work and a voice of influence in support of the Consortium's initiatives.

In order to help them identify potential executive sponsors, the industry partners should think back to the executive interviews they conducted during the pre-work. Were there any executives who were clearly passionate about the workforce issues and were engaged in the discussion? If so, that executive could play a key role in the Consortium. The industry partners should review the *Role of the Executive Sponsor on a Consortium* document, and discuss potential candidates. Once agreement is reached on the primary candidate, the member from that company should contact the candidate to invite him/her to serve in the role. If possible, the Executive Sponsor should be present at Day 2 of the Strategic Planning Workshop.

❑ **STEP 3 – Discuss the role of Project Manager.**

In addition to the essential roles of Chair, Co-Chair, and Executive Sponsor, a State Energy Workforce Consortium must identify a resource or resources to provide support to the Consortium's leaders and membership. Consortia have different names for this role: secretary, project manager, convener, etc. The role is important to assuring continuity and sustainability of the Consortium, especially through leadership and membership changes. In addition, this role will provide support to the Chair to ensure that information and communication flow to Consortium members. See *Structure and Support: Building Sustainability in a State Energy Consortium*.

❑ **STEP 4 – Define membership expectations.**

It is important as you are establishing the Consortium to define the roles and expectations of all members. Does the Executive Committee expect 100% attendance at your face-to-face meetings? If they can't make it, can they send a representative? Does each member need to be part of a task force or committee? Use the *Structure and Support: Building Sustainability in a State Energy Consortium* document as a guide.

❑ **STEP 5 – Determine an annual meeting schedule for the full Consortium.**

It is important to have an annual schedule of Consortium meetings established and on everyone's calendar. This schedule can be communicated to members during Day 2 of the Strategic Planning Workshop. It is also recommended that the Consortium project manager send calendar notices to the membership for the meeting dates.

Action 2: Develop draft vision and mission.

Vision and mission statements are meant communicate the purpose of the consortium and why it exists. Developing a vision and mission statement for the Consortium during one of the strategic planning days may be difficult and take a significant amount of time. However, it is important to have all stakeholders aware of and committed to the vision and mission of the Consortium. It is, therefore, recommended that the vision and mission be developed by the Executive Committee and then tested with all of the stakeholders at Day 2 of the Strategic Planning Workshop. Use the *State Consortium Strategic Plan Template Definitions* and *Generic Overarching Strategic Plan Framework* documents as guides.

❑ **STEP 1 – Develop a draft vision.**

The Consortium should be able to define what they would like to become over time. Identifying your ultimate reason for having a consortium is helpful in the strategic planning process. Once you have defined your vision, you can begin to develop strategies for moving the Consortium toward that vision.

❑ **STEP 2 – Develop a draft mission.**

In this step, the purpose of the Consortium's existence will be defined. The mission statement should be a reminder of why the Consortium exists. The Consortium's work should all link back to your vision and mission. See the *Generic Overarching Strategic Plan Framework* document.

Action 3: Plan for Day 2 of the Strategic Planning Workshop.

❑ **STEP 1 – Identify additional stakeholders.**

During Day 1 of the Strategic Planning Workshop, the Consortium discussed additional stakeholders that may need to be invited to the meeting. These may be contractors, educators, or workforce planning agencies. The Executive Committee should review and finalize the invitee list and decide if, in addition to an email, a call from an industry partner would be helpful in engaging these new stakeholders. If so, the Executive Committee should identify who will be responsible for contacting the new stakeholders. If contractors are added as key stakeholders, it is recommended that the representative from the company that hires the contractors reach out to them, explain the work of the Consortium, and invite them personally to the next meeting. This has been very successful in several states.

❑ **STEP 2 – Set up meeting logistics.**

Determine location for the workshop. Location of the meeting is important. Consider how far the stakeholders will need to travel to get to the meeting location. Ensure that the room is large enough to accommodate everyone who is invited.

❑ **STEP 3 – Develop agenda.**

The Executive Committee should develop the agenda for the meeting and assign members as needed to invite speakers or other presenters who may be identified on the agenda.

❑ **STEP 4 – Update Consortium distribution list and invite stakeholders.**

The Executive Committee should work with the project manager to update the Consortium's main distribution list to ensure newly invited stakeholders are captured on the roster. The Co-Chairs should develop a meeting invitation and engage the project manager to have the invitation sent to all Consortium members and additional stakeholders.

Building a State Energy Workforce Plan: Day 2

Workshop Overview and Learning Objectives

Strategic workforce planning begins with the companies' business strategies and continues to a set of key workforce strategies, including strategies for workforce development. The workshop will take the priorities identified in Day 1 of the workshop and develop strategies, action items, and draft measures of success. The Consortium will begin the workshop with reviewing and approving a vision/mission for the Consortium, given that industry, education, and workforce stakeholders are at the table.

Target Audience

Energy companies, including co-ops, municipalities and energy company contractors, education system representatives, and workforce partners all participate in Day 2 of the workshop.

Prerequisites

See below. Pre-work is required.

Learning Objectives

Participants will:

- Discuss roles and responsibilities for Consortium members
- Review/approve a vision and mission for the Consortium
- Identify long- and short-term priorities/key areas of focus
- Develop an Action Plan for each of the priorities/key areas of focus
- Identify measures of success

Deliverables

After completion of Day 2, the Consortium will have agreed upon its vision/mission, objectives, strategies, and actions for moving forward both in the short-term and long-term.

Preparation: In Advance

- Workshop leader should provide notes from Day 1 of the workshop to Day 2 participants.
- Develop the PowerPoint presentation for Day 2 to include the game changers, SWOT analysis, and other outcomes form Day 1.
- In order to prepare for Day 2 of the Strategic Planning Workshop, industry partners should complete the actions identified in *Pre-Work Guide II*.

Materials/Handouts

See the last section of this guide. Handouts should be copied in advance along with a roster of workshop participants.

Preparation: Day of Workshop

Room Set-up: The ideal room set-up for the large group discussion is a hollow square. Preparation should also be made for afternoon breakout group discussion, either by moving chairs to corners of the room or assigning breakouts to small conference rooms if available.

A-V: Set up a projector and screen and load the PowerPoint presentation, *Strategic Planning for State Consortia: Day 2*.

Flipchart: Provide at least four flipcharts with paper and markers. Prepare a set of flipchart pages for the questions that will be discussed during the analysis. Two or three pages for each topic should be sufficient. Make sure you have either the kind of flipchart that has pages that are sticky or have masking tape on hand. Topics include:

- Vision/Mission
- Consortium Structure
- Key Areas of Focus/Objectives
- Strategies
- Action Items
- Measures of Success

A "Parking Lot" page should also be created and taped on the wall to record topics or ideas that are not directly relevant to today's workshop and can be discussed at a different time.

Schedule

15 Minutes — Introduction (Slides 1-4)

Use the PowerPoint slides *What is a Strategic Plan?* as a guide to review the purpose of a strategic plan.

State the learning objectives for the program from the slides and that the purpose of this second day is to take the focus areas/priorities identified in Day 1 and complete the strategic plan, including a vision/mission, objectives, strategies, action items, and draft measures of success.

Next, explain the format for the workshop. This is a hands-on workshop where participants will work together as a large group as well as in small groups. All participants are expected to contribute since a State Energy Workforce Consortium is truly a group effort.

15 Minutes — Introductions/Ice Breaker (Slide 5)

Have participants state their name, company, role in the company, and what they would like the Consortium to become over time. Welcome and note new participants who didn't attend Day 1.

If an Executive Sponsor has been identified, have the Executive Sponsor introduce him/herself and discuss the importance of the Consortium's work and benefits to the industry partners. Ask the Executive Sponsor to comment on pertinent game changers and their impact on the workforce, and to share personal priorities for workforce development, which should help convey the Executive Sponsor's commitment to the Consortium's vision and mission.

20 Minutes — Consortium Structure and Roles/Responsibilities of Consortium Members (Slides 6-9)

This is the opportunity to review on the Consortium structure, the role and makeup of the Executive/Steering Committee, and roles and responsibilities of the various Consortium members. All are necessary for the achievement of objectives and success of the Consortium. Have the participants think about how their organizations can best contribute to the work of the Consortium. Use the *Structure and Support: Building Sustainability in a State Energy Consortium* document.

25 Minutes — Vision/Mission (Slides 10-11)

For this next section, facilitate the process by which the Consortium members can review and agree on a vision/mission statement, which has been already developed by the Executive/Steering Committee. Don't spend too much time on this. The objective is to gain consensus from all on the overarching vision and mission of the Consortium without digressing into lengthy wordsmithing.

15 Minutes — Break

20 Minutes — Assess the State of the Industry (Slide 12)

Review the first steps of strategic planning that were completed Day 1 of the workshop, based on the notes that were compiled that day. This includes state of the industry, workforce gaps, current and future demand trends, and the state's energy policy. Ask for input and agreement from new stakeholders at this meeting.

60 Minutes — Review of SWOT and Gap Analyses from Day 1 (Slides 13-14)

Project the slides of the SWOT Analysis from Day 1 (and/or notes that were copied and distributed). Ask for input and agreement from new stakeholders at this meeting. Next, do the same thing for the gaps and focus areas/priorities from Day 1.

45 Minutes — Lunch

The lunch period may be shortened or turned into a "working lunch" if discussion runs over in the morning.

60 Minutes — Turning Priorities into Objectives (Slides 14-16)

Spend the next hour taking the areas of focus/priorities and converting them to "Objectives" as defined in the *State Consortium Strategic Plan Template Definitions* document. Use the flipchart for this process. It may be helpful to categorize the objective by the Strategic Pillars listed on slide 16. In addition, it may be helpful to review the strategic plan template from CEWD and ask the Consortium members to validate or modify those strategic objectives for the Consortium. If those are valid, the Consortium can use those objectives and take their priorities and list them under each of the strategic objectives. (Use *Generic State Overarching Strategic Plan* template.) To ensure language alignment, use the *Strategic Planning Definitions* document and provide them as a background document for this piece.

Recommend that all four pillars and strategic objectives listed in the CEWD template be included in the strategic plan even though there may not be any short-term priorities identified for each of the strategic objectives. The plan should be reviewed on an annual basis and each pillar and strategic objective should be reviewed and considered. The Consortium is responsible for the work to be completed under the three strategic pillars: Career Awareness, Education, and Workforce Planning. It is important to note that the initiatives under the Structure and Support pillar is done by the Executive Committee.

75 Minutes — Developing Strategies and Actions (Slides 17-21)

Before beginning this next session, divide participants into small groups, taking into account their areas of interest or expertise. The number of people in each group will depend on the number of objectives that need to be discussed and number of participants at the meeting. Try to ensure there is representation from industry, education, and workforce for each group. Groups should take their objectives, brainstorm, and then prioritize a set of strategies (HOW they will achieve each objective). CEWD has a checklist of ideas and suggestions of where the Consortium can focus its efforts, as well as a listing of promising practices from other consortia. (Use *State Consortium Checklist* and *CEWD Promising Practices*.) Groups should use the prioritization matrix to help them prioritize the strategies and determine which strategies are viable for the Consortium. The prioritization matrix will help the groups identify the short-term and long-term strategies. (Use *Activities Prioritization Matrix*.)

15 Minutes — Break

30 Minutes — Assignments (Slide 22)

Reconvene as a full group and have a representative from each breakout group report on their strategies. The Consortium as a whole should identify what strategies they will commit to for the first year. They will need to take into account all the recommendations and what is feasible for the Consortium. This can be done through several methods. The Consortium can vote by a show of hands, or they can each be given four dots and asked to place them on the flipcharts on the items they feel are the most critical.

Once the priorities for year one have been identified, it's recommended that a leader be identified to lead a task force for each priority, as well as asking for volunteers to participate on each task force. Be sure to ask volunteers to sign up for the task forces prior to the end of the meeting. This can be done by passing around a sign-up sheet listing each of the task forces. The task force members will work together over the next several months to develop a detailed work plan with designated responsibilities and timeframes. In addition, they will identify potential measures of success for each objective. Groups should use the *State Consortium Action Planning Template*.

40 Minutes — Measures of Success/Closing (Slides 23-27)

For this next session, discuss how the Consortium will measure the success of each objective. Some examples are included on the slides. Describe the difference between Key Performance Indicators (KPI) and Critical Success Factors (CSF). Ask the Consortium to discuss KPIs and CSFs as potential measures.

Some suggested measures are:

- Increase the percentage of qualified candidates for critical positions by x%
- Increase the pass rate for the pre-employment test by x%
- Increase the percentage of applicants that pass the physical ability test by x%
- Increase the percentage of females hired into nontraditional jobs by x%
- Increase the percentage of veterans hired by x%

During the session, it will be difficult to identify the specific number or percentage. However, the Consortium can brainstorm high-level measures for each strategic objective. In order to identify the specific number or percentage for each measure of success, the industry partners will need to identify their company's current measure to determine the percentage increase or the change in the number in order to determine the future measure for the Consortium as a whole. For example, if the current average pass rate for all companies for the physical abilities test is 50%, the future measure may be an increase of 5%, bringing the pass rate to 55%.

Close the session and go over the next steps on slide 28.

Next steps should include the date or timing of the next Consortium meeting and the process for task force leads to report progress back to the Executive/Steering Committee.

Materials/Handouts

- Strategic Planning for State Consortia Day 2 PowerPoint Presentation
- Meeting Agenda
- Notes from Day 1 with priorities/focus areas
- Structure and Support: Building Sustainability in a State Energy Consortium
- Role of Executive Sponsor
- State Consortium Strategic Plan Template Definitions
- Generic Overarching Strategic Plan Framework
- Generic State Consortium Action Planning Template
- State Consortium Checklist
- Promising Practices
- Prioritization Matrix
- Workforce Development Evaluation Toolkit

You can find all of the materials available for download on the CEWD website at:
www.cewd.org/wizard/consortium/strategic-planning-materials.php

III. Implement

Establish the Structure to Implement the Consortium's Strategic Plan

Now that the Consortium has gone through a process of compiling workforce analytics, identifying areas of strategic focus, developing workforce development strategies, and creating an implementation plan and high-level metrics, they are ready to begin implementation of the short-term actions.

During Day 2 of the Strategic Planning Workshop, the Consortium identified strategic objectives and brainstormed actions to address those objectives. Since the intent of the owrkshop was to develop a 3–5-year strategic plan, an outcome of Day 2 was a list of strategies, some of which would be implemented in the short term, and others over the long term. The Consortium also prioritized and identified the activities they would work on during year one of their plan and established task forces with energy industry leads to begin the development of a detailed action plan.

Action 1: Assign accountability for the development and implementation of short-term action plans.

❑ **STEP 1 – Establish task forces for each of the short-term strategies in the strategic plan.**

Also during Day 2, the consortium established task forces for each of the short-term strategies in their plan. The task forces should meet to develop a detailed step-by-step plan for implementation. The task forces should utilize the *Strategic Plan Action Planning Template* to define specific steps necessary for implementation, along with a timeframe and accountability. They can also refer to the *CEWD Promising Practices* document to identify other Consortium or companies who may have implemented a similar action and may want to reach out to them for lessons learned.

❑ **STEP 2 – Identify a leader for each of the task forces.**

A State Energy Workforce Consortium should be led by industry members. Part of the leadership role is for industry members to chair or lead each task force that is formed; this assures integration with the Executive Committee/Steering Team. It is advisable to have a broad representation of the Consortium membership on each task force, including industry, education, workforce, and any other stakeholders that may be involved in the Consortium, such as contractors.

Action 2: Establish a process for reporting updates on progress to the Executive/Steering Committee.

The Executive/Steering Committee should closely monitor the work of the task forces and should implement a process (conference call, emails, etc.) for receiving updates on their progress every 4 to 6 weeks.

❑ **STEP 1 – Task force leaders establish a meeting schedule with their task force members.**

Task force leaders should set the first meeting and, if possible, a regular meeting schedule with his/her task force members. We suggest that the task forces meet monthly at a minimum, which can take place via conference call. This should be done pretty quickly after Day 2 of the Strategic Planning Workshop. This will continue the momentum that is gained during the workshop.

❑ **STEP 2 – Executive/Steering Committee set up and communicate meeting dates.**

Depending on the work of the task forces, the task force leaders should provide an update to the Executive/Steering Committee on their progress. These updates can be done via a conference call and can also provide an opportunity to gather input and make decisions needed by the task force.

The Executive/Steering Committee should set a regular schedule for these meetings.

Action 3: Document the meeting.

❑ **STEP 1 – Update all documents.**

If during Day 2 any of the recorded data from Day 1 has changed, the workshop leader should update all the documents from Day 1. As an example, if contractors attended Day 2, they may have added to the game changers, SWOT analysis, and demand data.

❑ **STEP 2 – Send all updated materials to Consortium members.**

The workshop leader should document the meeting discussions and capture all data and flipchart notes from the Day 2 meeting. In addition, all charts should be updated with changes, if any, made at the meeting. The meeting notes, along with all updates, should be reviewed by the co-chairs for accuracy and distributed to Consortium members no later than two weeks after the Day 2 meeting.

Action 4: Establish an annual schedule of Consortium meetings.

The Executive/Steering Committee should establish an annual meeting schedule for Consortium meetings. These can occur quarterly or more frequently depending on the work underway in the Consortium. Meeting agendas should include opportunities to review task force status, provide input, and continue the implementation of the strategic plan.

Action 5: Executive/Steering Committee will build out the structure of the Consortium and put measures in place to ensure sustainability over time.

❑ **STEP 1 – Review Consortium structure and identify additional roles that may be needed.**

During the first year, the Consortium's Executive/Steering Committee should continue to work on the structure of the Consortium. There are several strategies that can help assure continuity and sustainability of the Consortium through changes in strategic focus, leadership, and membership.

In addition to the essential roles of Chair, Co-Chair, and Executive Sponsor, a State Energy Workforce Consortium needs to identify a resource or resources to provide support to the Consortium's leaders and membership. If this role has not yet been defined, it is important to identify someone for this role to assist in providing follow-up after the strategic planning workshops. (See *Structure and Support: Building Sustainability in a State Energy Consortium*.)

❑ **STEP 2 – Plan for leadership changes before they occur.**

Energy company reorganizations, leadership changes, and retirements are the norm, but when these changes impact the leadership of a State Energy Workforce Consortium, the result can be detrimental to the Consortium and the state's energy companies it supports. Leadership changes should be anticipated and addressed with effective succession planning and knowledge transfer to ensure the Consortium does not lose focus or momentum. Leadership development of the Consortium's industry partners should occur on a regular basis to better prepare members to step into the Consortium leadership role, should it be necessary. The Chair and Co-Chair should encourage other industry members to broaden their engagement in the Consortium through one or more of these strategies:

- Leading a committee or task force on behalf of the Consortium and serving on the Executive/Steering Committee
- Reviewing information for State Energy Workforce Consortia on www.cewd.org

- Attending CEWD-sponsored meetings (Regional Meetings, National Forum, Annual Summit)
- Participating on quarterly CEWD State Energy Workforce Consortium calls
- Presenting at a Consortium meeting

❑ **STEP 3 – Determine if other CEWD Workshops will help with the implementation of action plans.**

As the Consortium begins the implementation of its strategic plan, there may be a need for additional guidance. CEWD has developed several workshops that can assist Consortia in their implementation strategies. Consortium members should review these workshops and determine the ones that will add value and help the Consortium move forward in their implementation. Some of these workshops are: Building Partnerships, Credentialing, and Get Into Energy Career Pathways. There are other tools and resources available to Consortia on the CEWD website. They can be found at www.cewd.org under the CEWD members implementation wizard section.

Action 6: Establish annual reviews of the Consortium's strategic plan.

The Consortium's strategic plan should be reviewed annually during a regularly scheduled Consortium meeting. The following elements of the plan should be reviewed and a determination made whether changes are needed to the original strategic planning documents:

- Game Changers: Are there new game changers that either impact the industry's business direction or the Consortium's strategic plan? Have any existing game changers been resolved? Is there a need to alter the strategic direction of the plan?
- Workforce Development Gaps: Are there new gaps that have surfaced that may need to be addressed? Are previously identified gaps no longer gaps?
- SWOT Analysis: A review of the SWOT analysis is appropriate at this time. Do any of the additions to the SWOT analysis impact the direction of the Consortium?
- Strategic Objectives: Have any of the strategic objectives been addressed? If so, are there others that need to be added?
- Short-Term/Long-Term Activities: Have any of the short-term activities been completed? If so, what were the outcomes? What additional activities need focus by the Consortium? Do any of the long-term activities need to be addressed more quickly as a result of game changers or additional gaps that have been identified?

IV. Measure

Develop measures for each of the strategic objectives

It is important that as part of the strategic planning process, the Consortium develop measures for each of its strategic objectives so as to better understand how successful the efforts have been and to know where and how to adjust in order to improve. Evaluation and metrics are a critical link in any planning process. The Workforce Development evaluation process developed by CEWD can be used as a framework for measuring any workforce strategy. See *Workforce Development Evaluation Toolkit*.

Some suggested measures are:

- Increase the percentage of qualified candidates for critical positions by x%
- Increase the pass rate for the pre-employment test by x%
- Increase the percentage of applicants that pass the physical ability test by x%
- Increase the percentage of females hired into nontraditional jobs by x%
- Increase the percentage of veterans hired by x%

Additional measures can be found in the *Workforce Development Evaluation Toolkit*.

These are typically known as Key Performance Indicators (KPIs). They are quantifiable measurements that reflect progress toward defined goals. There should be at least one measure identified for each strategic objective.

Action 1: Identify measures to determine progress toward strategic objectives.

As we all know, we focus on what we measure. It is important to identify measures for each strategic objective so you understand what your goal is and can determine whether you are making progress toward that goal.

❑ **STEP 1 – Brainstorm potential measures for each of the strategic objectives.**

Begin by identifying potential measures for each of the strategic objectives. These strategic objectives may span several years; therefore, the Consortium should take that into consideration.

❑ **STEP 2 – Agree upon measures that are acceptable to all Consortium members.**

Once you have brainstormed some measures, reality must set in. You must understand how this information will be gathered and the feasibility of gathering this data at each of the member companies. If the information is not readily or easily available, it may not be a valid measure. Understanding how much effort it will take for each company to pull together the data is an important aspect of your decision-making. However, it is advisable to have some measures to determine if you are making progress toward your goal. The *Workforce Development Evaluation Toolkit* may be a valuable guide when identifying measures.

❑ **STEP 3 – Develop a target for each measure.**

In order to determine a target goal, Consortium members need to share where they are currently. Have each industry partner provide their current company results for each measure. These measures should be integrated to form a reasonable baseline for the full Consortium. Once you understand that, the Consortium can then determine a realistic-yet-stretch target for each measure.

❑ **STEP 4 – Identify Critical Success Factors for each measure.**

We also recommend that the Consortium identify Critical Success Factors (CSFs) for each of their measures. CSFs are actions that need to be in place to achieve strategies. For example, a target goal may be to increase the number of qualified applicants, and a CSF would be the existence of focused career awareness programs, or education programs to improve applicant skills in an area where there may be a gap. In other words, the existence of career awareness or education programs in and of itself may not indicate progress towards the goal of qualified hires. But the absence of career awareness programs makes it harder to achieve the goal, so it becomes a factor for success in achieving the goal.

❑ **STEP 5 – Develop an internal process to gather the data and report it annually.**

In order to accomplish this, it is important that each industry partner work within his or her own organization to develop a process to gather data on an annual basis. This data will then be pulled together annually at a Consortium level to determine if progress is being made.

Action 2: Measure progress toward strategic objectives.

❑ **STEP 1 – Establish annual reviews of the Consortium's strategic plan.**

As the Consortium is developing its annual meeting schedules, it should identify one of the days as an annual review of the strategic plan. This would encompass a review of the game changers and their impact on the workforce; review and modification, if necessary, of the SWOT analysis; and conducting a review of the gap analysis. In addition, progress toward measures should be reviewed. Is the Consortium making progress toward the goal? If not, where does the plan need to be adjusted?

Action 3: Implement CEWD Workforce Metrics Tool.

❑ **STEP 1 – Compile data and enter into *Metrics Tool*.**

CEWD has developed metrics designed to measure the success of specific workforce development strategies. Your Consortium may have additional strategies that you will need to assess for different metrics. Please refer to *Workforce Development Evaluation Toolkit*.

❑ **STEP 2 – Publish Consortium Metric Scorecard.**

It is important that you communicate the work of the Consortium and the progress it is making towards its strategic objectives. The CEWD workforce metrics tool can be a valuable tool in developing a Consortium scorecard.

Published by the
Center for Energy Workforce Development

701 Pennsylvania Ave. N.W.
Washington, DC 20004-2696
202-638-5802
www.cewd.org