

# **Leading Your Workforce Development Board to the Next Level:**

## **A Strategic Perspective**

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**July 12 2001**

# A Sense of Urgency

*“The biggest threat to our economic survival is the lack of a skilled workforce”*

Tony Zeiss  
President CPCC

# Where are Workforce Development Boards Now?

- Struggling with change and transition associated with creating a better system
- Defining their strategic role
- Moving away from “operations”
- Finding ways to engage private sector members



# **How Can Boards Lead Change and Transition in the New Workplace?**

# Change vs. Transition

*Change* and *Transition* are not the same

Change = a shift in the external situation

Transition = the psychological reorientation in response to change

# Powerful Changes in the Nature of Work

## External – “The New Economy”

- Global markets
- Technology
- Knowledge as the driving force

## Internal – “WIA”

- Universal access
- One Stop System
- Market Driven

# Phases of Transition

- **An Ending**
  - A loss
  - Letting go of the old ways and values
- **A Neutral Zone**
  - In-between time
  - The wilderness
- **A Beginning**
  - Being part of the team
  - Renewal

# WDB Role is to Help Overcome Resistance

- It is the Transition not the change that people often resist.
  - Loss of their identity and their world
  - Disorientation of the Neutral Zone
  - Risk of failing in a new beginning



# The 5 P's of Transition Leadership

- **The Purpose:** Sell the Problem as all of ours
- **The Picture:** A shared vision of the outcome
- **The Plan:** A shared scenario for getting there.
- **The Part:** What you (and she and he) can do to get us there.
- **The Principle:** “No One Left Behind”

“It is a terrible thing to look over  
your shoulder when you are  
trying to lead – and find no one  
there.”

FDR

# Leadership Matters

## *Exercise*

- *Imagine that you are being interviewed by the local media about what you have accomplished during the last five years.*
- *What is the headline?*
- *What is the article about?*
- *What is the positive quote in the article and who said it?*
- *What is the negative quote in the article and who said it?*

***How do Boards make the transition from operating programs to leading a system?***

***Focus, Focus, Focus***

# Focus #1: The 80/20 Rule

- **Old: The Board spent 80% of its time managing programs and services**
- **New: The Board spends 80% of its time managing workforce and community issues**
  - **Governance and stewardship (internal business)**
  - **Leadership (external business)**

# Focus #2: Doing the Right Work as a Board

- You're not the Board of Directors for the One-Stop Center
- The Board manages issues, not programs and services

# **In order to Focus, Boards need to define:**

- **Their Function**
- **Their Work**
- **Their Funding**
- **Their Role in the Community**

# The Function of the Board:

- *be the community's “champion” for workforce development and the “catalyst” for creating a diverse and higher quality workforce*



# The Work of the Board:

- Convey a vision/tell your story through your strategic plan
- Include accountability measures in your plan
- Manage workforce issues
- Set priorities/define next steps for achieving the larger workforce development system
- Organize to complete the work of the Board
  - *Strong staff*
  - *Strong committee design*
  - *Strong private sector presence*
  - *Strong Business Plan*

# The Funding of the Board:

- Have a funding strategy beyond Workforce Investment Act (WIA) funds to do the *work* of the Board
  - Other government and business
  - Foundations
  - Fee for service

*Define what needs to be done, then go find the funds to do it*

# The Role of the Board in the Community

- Being the *champion* for workforce issues
- Being the community's *change* agent
- Being the community's *convening* agent
- Being the community's *accountability* agent

***Once you know what you want to accomplish.....***

***.....Its all about Leadership***

# Demonstrating Leadership

- Effective boards demonstrate leadership in two distinct and valuable arenas
  - *Accountability* for the delivery of quality publicly funded workforce services
  - *Identification and management* of workforce issues

# Leadership Attributes of Effective Boards

- Focus on issue management
- Hold accountable those responsible for getting the work done
- Form issue management groups involving members beyond Board
- Develop staff capacity for Board's work
- Have organizational and meeting structure that focuses on important issues
- Be well-informed in order to make effective policy
- Recognize importance of communication on many fronts

# Exercise

## Holding Yourself Accountable as a Board

**Describe the agenda for an effective WDB meeting. What would be included? How long would the meeting be?**

**Develop a five question survey to administer at the end of each of your WDB meetings.**

**Focus on what's important to your success.**

# ***Accountability is...***

*Ways of knowing whether the job is getting done without looking over any shoulders*

*That frees you up for strategic thinking*

*...thinking ahead to seize opportunities and to derail threats to your plans*



# WDB Accountability

Each Board needs to address  
both *Internal* and *External*  
Accountability

# Internal Accountability *What is your business?*

- Develop a **Board Business Plan** that defines your structure, your work, how you will conduct your business, and how you will hold yourself **accountable** in three areas:
  - (1) **The Board and the One-Stop**
  - (2) **The Board and oversight of public funds.**
  - (3) **The Board and committees**

# **Internal Accountability Tools for**

## **(1) The Board and the One-Stop/Career Center**

- Chartering**
- Career Center Business Plan**

## **(2) The Board and Public Funds**

- Develop a broad Scorecard that measures success, and can communicate that success to the public.**

## **(3) The Board and Committees**

- Define Board-Committee roles in the Board Business plan**

# **Use a Career Center Business Plan to:**

- **Define One-Stop Center as a business**
- **Unify plans for service delivery**
- **Unify staffing structure for all partners**
- **Unify budget for all partners**
- **Define outcomes for total center**

# Use Chartering as a Tool to:

- Give the Career Center Operator “license” to operate a specific site
- Set quality standards for the site through the Board’s chartering criteria
- Create accountability mechanisms
- Define responsibility of others to the Operator
- Establish expectations for continuous improvement for the site

# Use a Strategic Scorecard as a Tool to:

- Broadly state what's important to your Board--for the long term.
- Define meaningful measures beyond required compliance or program specific measures.
- Measure your strategies and whether you are making progress toward your vision.
- Keep in mind - What gets measured, gets done.

# **External Accountability is about *Where are you going as a Board***

The Board's Strategic Plan should tell a story.  
The Board's Strategic Planning Process offers  
the opportunity to engage the community in  
defining the work of the Board by:

- Identifying major community workforce issues that are barriers to employment.
- Creating a vision for the community based on the work of the board.
- Engaging community leaders in establishing goals.

# External Planning (Cont)

- **Connecting workforce development with education and economic development**
- **Establishing measurements for success**
- **Assigning tasks to appropriate committees to get the job done**



# The Board's "Work" is in the Planning

- **Strategic Thinking and Planning**
  - **Considers many possible futures**
  - **Frames challenges and opportunities**
  - **Creates options and informed choices**
  - **Opportunity to think big**

# Build Strategic Partnerships

- The Board's power is as a *convener* and facilitator, not its legal authority
- Effective community planning only happens if it *engages* a broad cut of the community
- Goal is to *influence* public and private decision-makers well beyond funds under Board authority
- Keep stakeholders on your side

# The Board's Signature Product

- The strategic plan sets the board's agenda and leads the way
- It is evergreen
- Leads to a major accountability and Board positioning product
  - A *“State-of-the Workforce Report”*

# State-of-the- Workforce Report

- **Answers where we are and the state we are in**
- **Establishes the community's vision**
- **Sets goals to close the gaps**
- **Assigns goals to the organization responsible**
- **Published results at regularly established intervals**
- **It tells a compelling story for the community to buy into**

# Leadership Matters

## Exercise

*What are the 3 next steps necessary to take today to move from where you are to where you want to be?*

# Twelve Habits of Successful WDBs

According to John Metcalf, CSW

*What do boards do to be noticed and recognized as Leadership Boards? They all share those things that set them apart.*

- ◆ Focus on Issue Management
- ◆ Don't Micro-Manage Programs
- ◆ Hold Accountable Those Responsible For Getting The Work Done
- ◆ Form Issue Management Groups Involving Members Beyond Board
- ◆ Develop Staff Capacity for Board's Work

# Twelve Habits of Successful WDBs (Cont)

- ◆ Diversify Funding Beyond WIA
- ◆ Create CEO-Level Agenda
- ◆ Treat Economic Development and Education as Primary Customers
- ◆ Have Own Business Plan
- ◆ High Priority on Information
- ◆ High Publicity of Goals and Outcomes
- ◆ Long-Term Vision with Short-Term Wins