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Strategies for Aligning Workforce and Education Initiatives

Lessons from a Workforce Board

AT A GLANCE

Effective design of education and workforce pathways requires strong coordination and collaboration between cross-sector groups. New initiatives and funding opportunities can result in a duplication of efforts within regions, leading to fatigue and confusion for education and workforce groups. This brief case study examines how Workforce Solutions of West Central Texas approached reorganizing and realigning its workforce and education initiatives and offers lessons for other regions looking to undertake the same.

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Jobs for the Future (JFF) drives transformation of the U.S. education and workforce systems to achieve equitable economic advancement for all. www.jff.org.

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01.

Why Realign: Background About Workforce Solutions of West Central Texas

Workforce Solutions of West Central Texas covers a primarily rural 19-county region and offers a broad range of services. It provides workforce development services to businesses in the region, jobs and training for individuals, child care scholarships and assistance to child care providers, and career education for students. Workforce Solutions has a long history of bringing higher education, industry, and K-12 education together as a neutral convener to address regional workforce needs.

Over its 27-year history, Workforce Solutions has expanded its influence in the region as new workforce and education initiatives and funding opportunities were launched statewide and nationally. By 2022, Workforce Solutions led eight cross-sector teams comprising education institutions, employers, and other community organizations aligned to various initiatives, including Advance Together, the Texas Regional Pathways Network, WE CAN TX, the rootEd Alliance, and the Rural Postsecondary & Economic Development program.

This dramatic growth for Workforce Solutions in the last five years led to engagement with many partners across multiple initiatives and overlap in the goals, activities, and responsibilities of the groups and staff. Workforce Solutions saw a need to reorganize the management of its initiatives to streamline engagement and communications for partners, reduce siloing and duplication of activities, and solidify the value it brings to the region as a knowledgeable and regionally connected intermediary. As part of this process, Workforce Solutions moved to a new approach for organizing initiatives based on strategic priorities rather than individual grants or initiatives that will sunset when funding ends.

02.
Action Steps

Over eight months, Workforce Solutions leaders executed strategic planning activities to guide the realignment of initiatives. The section below serves as guidance for other organizations or intermediaries looking to realign their own initiatives and cross-sector teams.

- **Create vision and mission statements:** A short vision statement communicates the ideal future state of the region; a mission statement concisely describes the concrete focus and actions the organization will take to reach the vision. Starting with this as a first step helps a team align on the impact they hope to achieve as they dig into how initiatives and cross-sector teams can drive the work. Communicating the "why" behind how an organization organizes its initiatives is essential to communicating changes and goals with internal and external stakeholders throughout the redesign process.

- **Draft strategic priorities:** Identify four to six priorities for realizing your organization's vision and mission. Start by reviewing the goals of existing initiatives and programs and pull out areas of alignment, key themes, and gaps. Reflect on the mission and vision statements to see how the themes connect. For example, several initiatives may have a focus on work-based learning, so you may consider if or how your organization wants to create a strategic priority around work-based learning.

- **Map existing partnerships:** Develop a list of existing partners in the regional workforce and education ecosystem. Identify their key assets, expertise, and roles in existing local and regional initiatives. Reflect on where gaps may exist in the assets and strengths of your partners and your organization. Then, identify ways to partner differently to support your strategic goals (e.g., partnerships that should be strengthened or deprioritized and new partnerships to build). This will help you determine who should be at the table to support the execution of newly defined strategic priorities and associated cross-sector teams.

- **Set goals and key performance indicators (KPIs):** Begin setting SMART goals for the next one to two years focused on the key actions that will be taken to execute the strategic priorities. Create associated KPIs the team can use to measure progress.

- **Assess and align data:** Map all of the data collected for each initiative and program led by your organization. Organize the data points into themes and identify areas of overlap. Reflect on which data points are most meaningful for demonstrating impact and which align best with your identified KPIs and strategic priorities. Identify opportunities to streamline data collection and integrate data review cycles. Although some data may still need to be collected as part of funding requirements, consider how to discuss revising data collection requirements with funders over time.

- **Revisit the structure of external cross-sector teams:** Review the membership, purpose, and meeting cadence for each group. Use an opportunity and risk assessment to assess existing initiatives against new priorities and help you decide whether priorities and goals would be better served by an external group continuing as is, merging with another group, or being dissolved.

- **Align internal staff capabilities:** Assess the roles and responsibilities of the internal staff for supporting each initiative. Begin a process of "bucketing" the responsibilities, knowledge, and assets needed to manage each cross-sector team. Identify any opportunities to streamline responsibilities. For example, designate a single person to coordinate meetings across all groups to free up the capacity of directors. Alongside this process, identify unique capabilities and additional capacity that may be needed beyond the current staff and create a hiring plan.

- **Manage and communicate change internally and externally:** Design a communications plan that includes a dissemination plan to staff in different roles in the organization and the board of directors. Create talking points and documents to support staff understanding of new priorities, goals, and structures. Design a similar plan and tools for external audiences, recognizing that partners engaged in cross-sector groups will need a different approach for broader partners in the region.

Alongside these activities, regularly engage with internal and external stakeholders to sensitize information, gather input, or make decisions. The activities listed above are not perfectly sequential; Workforce Solutions went through three revisions to the strategic priorities as input was compiled from various stakeholders.

03.
Lessons Learned

- Mapping initiatives on paper helped the team compare each initiative's goals, structure, and management and identify areas of overlap. Looking at the initiatives under a microscope for closer examination revealed how much parallel work was occurring across projects with similar missions and values, leading to missed opportunities to solve common challenges. This analysis helped the team identify how to approach the work more effectively and efficiently, both internally and externally.

- Setting new strategic priorities required focusing on the entire workforce board's broader work and priorities across the system, including child care services and contracted work, versus narrowly focusing on the education and workforce initiatives managed by a subset of departments. It was critical for the entire leadership team to consistently bring a systems lens to thinking about how existing and new programs and initiatives connect to the broader scope and priorities of the board.

- Restructuring internal operations, including meetings, was one of the first steps toward creating internal alignment. Addressing internal communications challenges upfront and developing new communications processes across internal teams were critical before pursuing changes to external initiative groups.

- It was invaluable to spend several days off-site to deepen the relationships among the team members and bring in an external consultant with knowledge of the regional context to facilitate conversations.

04.
Moving Foward

The work to realign initiatives is still underway for Workforce Solutions, and the team has confidence that it will be making good decisions in the future because it has a solid foundation of mutually agreed-upon priorities and ways of working. By the end of 2023, the team aims to formally launch its new strategic priorities externally, with internal systems and structures in place to support the work ahead effectively. The team aims to apply the lessons it has learned internally with external groups and be a leader in promoting strategic alignment across the region.

While the process may look different depending on your organization's context, taking the time to step back and assess the alignment of your current initiatives will help you identify opportunities for greater efficiency, make better use of your resources, and ultimately increase your overall impact.

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