

Instructions for Reviewers

High Performing Workforce Boards (HPWB) Initiative

Expectations

As a reviewer, reading through each application is your first introduction to the Workforce Investment Board (WIB) and its activities. Your *initial score* of the LWIB Application should be generated by a careful reading of the application to determine the quality of the LWIB application. Reviewers should look for a combination of thoroughness and the quality of the response to each question.

The state has designed its expectations of a High Performing Workforce Board (HPWB) in partnership with Workforce Investment Boards (WIB) and communicated these expectations over the last 12 months. The following information has been shared with each region to *set expectations* for the requirements in the HPWB Application. As a reviewer, it is important to understand the expectations communicated to the network of WIBs to assist you in scoring applications. Based upon the four categories of HPWB criteria, the application questions were designed to solicit responses that reflect these criteria and request evidence of success. EOLWD'S expects the membership of the Workforce Investment Board and the executive director for each WIB to submit an Application that demonstrates how the Workforce Investment Board meets the criteria in each of the following categories.

Category A: Strategic Planning and Implementation

Major Product: A Strategic Plan for the Region

The foundation for the High-Performing Board Initiative is the development and use of a regional strategic plan to guide the work of the board. Effective local strategic plans and processes contain key characteristics that are inherent in the criteria:

The strategic plan is:

- **Based on a comprehensive analysis of regional labor market needs**, challenges and opportunities and **high priority populations** of the workforce.
- Aligned with **local and regional economic development partners**.
- Aligned with the **workforce priorities established by Governor Patrick** and built on input from the state and regional workforce system.
 - a. *Build Capacity of the Workforce System*
 - b. *Close the Skills Gap*
 - c. *Enhance the Youth Pipeline*
- Descriptive of strategic objectives, policies and service strategies to meet the needs of broad-based and **targeted populations** and reflect the priorities and needs of employers in the region.
- Descriptive of strategic objectives, policies and service strategies that address the **youth** pipeline.
 - A High Performing Board will be evaluated on the strategies and partnerships developed with the private sector to create job placements for youth.

- Descriptive of strategic objectives, policies and service strategies that are evidence-based, and work to align **business** needs with labor market supply and increase the number of businesses using the One-Stop Career Center system.
 - A High Performing Board will be evaluated on the **number and quality of business-driven partnerships**¹ formed in collaboration with the Board to address skill alignment needs for critical sectors in the region as reflected in the strategic plan.
 - A High Performing Board will be evaluated on the strategies in place to increase the number of businesses served.
- **Measured by progress benchmarks** keyed to stated objectives and drive the actions of the Board.
- **Communicated to stakeholders.**
- **A document that aligns resources with strategic objectives.**

The strategic planning process is:

- Evidence-based and data driven.
- Guided by private sector input (board members and non-board members) from critical sectors in region
- Inclusive of all of the key stakeholders in a region.

Category B: Measuring Success

Major Product: A Performance Management Plan (or information on a documented performance management processes in response questions)

Performance Management: The Workforce Board will submit a Performance Management Plan *or information* on performance management practices for the region. The Performance Management Plan or responses to questions should cover:

- A documented process that demonstrates **board impact, growth and the Board’s relevance** to the community and Board members.
- **Continuous Quality Improvement practices** for the OSCCs and youth programming.
- **Process for and use of analysis on customer utilization of the service delivery system and its performance**, with emphasis on business customers.
- Policies and practices to improve weak performance
- Quantitative and qualitative progress on Board initiatives to address workforce needs of the region.

Category C: Managing the Work of the Board

Major Product: A Business Plan (or information on Board management and operations)

Business Plan: A high performing Workforce Investment Board will provide information on or submit the organization’s business plan describing how it manages the work of the Board. The

¹ These partnerships would primarily focus on partnerships between business, education (secondary, vocational and post-secondary) institutions, and workforce intermediaries to solve skill needs in a region. Other key organizations included as appropriate (economic development organizations, organized labor, community-based organizations)

business plan will describe how it operationalizes its functional responsibilities and measures progress of the Board. Requested information will include:

- **A management plan, budget and operational procedures** for the Board
- **Continuous Quality Improvement practices for the Board** as an organization.
- **Board functions that support the service delivery infrastructure** to better serve business and workers, including the promotion of key services like the Workforce Training Fund.
- Information on **alignment of Board membership** (type of organization) with strategic objectives for the region, **decision making authority** and **engagement in recruitment practices** of new members.
- **Active participation of Board members** in Board activities.

Category D: Oversight & Development of Financial Resources

Major Product: A Revenue Plan

Revenue Plan: A high performing Workforce Investment Board will submit a Revenue Plan that describes:

- The **region’s fund raising goals** as aligned with strategic objectives
- The Board’s **system(s) to organize and track existing regional resources**
- **Alignment of financial resources with targeted industries** or occupations in the region
- **Sound financial audits and use of funds.**
- **Strategies to increase or leverage resources for strategic objectives** and progress measures to assess revenue generation.
- **The establishment of basic “Return on Investment” measures** to communicate value of resources brought in by the region.

A high-performing Workforce Investment Board will describe throughout these products the use of continuous quality improvement (CQI) practices incorporated into the Board’s strategic, business, revenue performance management plans or practices, including the oversight of services through the local One-Stop Career Center and youth service system (Youth Council, vendors, etc.).

Reading and Scoring the HPWB Applications

Method for Scoring

Please read through the scoring tools to understand how you are asked to rate responses. Each application question is embedded in the scoring tool and a “point scale” is assigned to the question. The goal is to ensure continuity between reviewers and a more efficient reading process for the reviewer.

Think about your own method of scoring and establish a consistent method for reviewing and completing the sheet. For example, some reviewers start from **zero** and add points per question based on the quality of the response and some reviewers start with the **maximum number of points** and subtract based on the quality of the response. Either is valid; however, it is important that you are consistent with your methodology. *Which method do you use?*

Reading Applications

Past experience with similar grant review processes leads us to recommend the following process for reading each application:

- 1) Read through the WIBs Strategic Plan, as this is the cornerstone of the application. It should give you a good context for rating the answers to the questions in the application. Although there are questions in **Category A: Strategic Planning and Implementation** that relate to the Strategic Plan, the intent was not to have the WIB repeat information that was covered in their Strategic Plan.
- 2) Read through an entire category section of the application as a whole to understand what is being proposed.

Category A: Strategic Planning and Implementation

Category B: Measuring Success

Category C: Managing the Work of the Boards

Category D: Oversight and Development of Financial Resources

- 3) Go back through each category section to use the **High Performance Workforce Board Application Scoring Sheet** (see TAB 4 in the Handbook) to assess the strengths or weakness of each of the responses to the questions. The questions in the scoring sheet are listed in the same manner and order they were in the Application. We requested that the WIBs answer the questions in the order they were asked. Note: You will use a separate Score Sheet for each WIB Application (multiple copies will be sent with the applications).

- 4) Use the right hand boxes to score the strength of the response for that question. Please use the comments column to record your feedback on a question or section that should be raised in the review team meetings and should be included in feedback to each region as part of the technical assistance process that will be develop for regions that are not successfully in Round I. *Your total score for a category section (such as Measuring Success) will be based on the overall points from each of the questions in the section.*

- 5) Once you have completed all category sections (A through D). Total up the points on the last page to create your *total initial score*. Please insert your scores for the proposal into the *Scoring Summary Sheet (Tab 4)*.

- 6) **Once you have completed all the applications and filled in the data on the *Reviewer Scoring Summary Sheet*, please FAX (617 727-1090) or email this document to Arleen Damon at Arleen.Damon@state.ma.us by noontime, September 25th 2008.**

Concerns versus clarifying questions

The **High Performance Workforce Board Application Scoring Sheet** has a space for writing down additional questions in order to capture all the possible questions we want to ask at the site visit. If a Reviewer has concerns about something they have read in the application, it may be listed as a weakness until you feel the adequate resolution was achieved (through discussion at the Review Team Meeting or in the site visit).

Questions

If you have any questions during the scoring process, please call Arleen Damon (617 626-7102) or Diane Hurley (617 626-5701) also listed on Review Team Contact List.

Arleen & Diane will be able to answer technical questions but will not be able to give an opinion on the application itself. Answers to your questions, may be emailed to all committee members to ensure an even review process.