

## **Lake County Partners Business Outreach and Retention Scope of Work**

The Workforce Investment Board of Lake County recently approved the business outreach and retention strategy project with Lake County Partner's in support of its strategic plan to address the skills gap within key Lake County industry sectors and reformulate how available training funds are invested.

In order to provide a more seamless business outreach approach and improve efficiencies in meeting employer needs, the business outreach and retention strategy will focus on having a single point of contact which will enhance business relationships, increase awareness, and increase collaboration among the economic and workforce development leaders in Lake County to better meet the business needs.

The Workforce Investment Board anticipates that this new relationship will focus on long-term industry planning as it relates to talent attraction, development, and retention as a means to lasting economic growth. The Workforce Investment Board will focus metrics not on placement rates but quantitative and qualitative improvements in human capital.

### **Scope of Work**

The Scope of Work for the Business Outreach and Retention model includes all planning, execution, implementation and training for the model as defined by Lake County Partners and the WIB.

Lake County Partners will be responsible for the business outreach and company visits and engagements based on the LMI provided by the WIB. LCP will collaborate with the WIB and WDD on the planning steps to ensure the process and information align with the defined expectations of the WIB. LCP will work with the WIB and analyze LMI to agree on the key targeted industries and employers to be included in the outreach and retention strategy.

As steps are executed LCP will work with WDD to ensure the project progresses at a steady pace and stays on track in meeting key timeframes and benchmarks. LCP will be responsible for ensuring adequate personnel resources to execute the plan and implementation of the project. Not included in this scope of work are any direct job seeker services or job placement assistance to be performed by LCP.

### **Period of Performance**

The period of performance for the Business Outreach and Retention model is thirteen months beginning on June 1, 2014 through June 30, 2015. The first thirty days are scheduled for start-up activities and the launch of the PROJECT is July 1, 2014. The contract can be extend for an additional twelve months based on performance, funding and approval.

### Place of Performance

LCP will perform the work at its own facility. LCP will be required to meet with employers at the employer's facility. LCP and WDD will schedule and adhere to a weekly status meeting – meetings can be conducted in person or phone call.

LCP will be required to meet with the WIB at the quarterly WIB meeting to provide a project status and update.

### Work Requirements

LCP will be responsible for performing tasks throughout the PROJECT. The following is a list of these tasks which will result in successful deliverables:

Task	Owners	Mechanism	Output
Identify Lake County companies to be part of the outreach and retention strategy	LCP President WIB Manager	LMI data at NASCI level with	List of Lake County companies
Research the identified company to gather critical information	LCP VP	Database, local publications, company websites	Research survey completed
Establish a contact at the company that is a decision maker	LCP VP	Phone call, email, referral, direct contact,	Name of decision maker and scheduled meeting – onsite meeting based on value add message delivered
On-site company visit	LCP ED Manager LCP President	Onsite visit at the employer	Face to face meeting, facility tour, discussion on gathering information to understand issues and trends and begin developing value add from LCP
Business survey tool completed with unique employer information	LCP ED Manager LCP President	Standard business survey	Completed survey with all applicable questions answered
Document key issues, trends	LCP ED Manager LCP President	Business survey, discussion, ongoing	Company's priorities documented for

Task	Owners	Mechanism	Output
and priorities based on dialogue and discussion with the company		engagement	follow up and referral
Classify strategies based on issues, trends and priorities, and company input	LCP ED Manager LCP President	Business survey, discussion, ongoing engagement	LCP articulates next steps and referrals to company and referrals
Report to WDD the completed company profile and identified strategies	LCP ED Manager WDD Employment Specialist WDD Program Manager	Copy survey items to WDD	LCP shares completed survey with WDD and reviews and agrees on workforce strategies and next steps
Connect WDD to the employer	LCP ED Manager WDD Employment Specialist WDD Program Manager	Meeting, email, phone call	Introduce company contact to WDD
Follow up	LCP ED Manager	Meeting, email, phone call (timeframe needed)	Status report on documented issues, referrals and priorities
Evaluate	LCP President WIB Manager	Tools and reports to be developed	To be developed

### Schedule and Milestones

Start-Up:

June 1, 2014 – June 30, 2014

- Cross training LCP staff on workforce development programs and services
- Training and access to WIB LMI database for LCP staff
- LCP & WIB agree on target industry and companies
- Business survey tool developed, reviewed and approved by LCP, WIB, WDD
- List of companies to target is reviewed and approved by LCP, WIB
- LCP researches companies
- LCP identifies lead project contact
- WDD to identify lead project contact

Implementation schedule:

July 1, 2014 – July 31, 2014

- LCP completes six unique employer visits
- LCP,WIB, WDD meet to debrief on first round of visits and output
- LCP &WDD establish weekly meeting schedule and agenda

August 31, 2014

- Employer visits continue
- LCP,WIB, WDD meet to debrief on visits and output
- LCP & WDD meet weekly

September 30, 2014

- Employer visits continue
- LCP & WDD weekly meetings
- LCP website updated to include workforce development and a link to WDD website
- LCP completes 30 unique employer visits

October 31, 2014

- Employer visits continue
- LCP & WDD weekly meetings
- Customer relationship management data-base sharing
- Marketing message finalized
- 1<sup>st</sup> quarter progress report
- 1<sup>st</sup> quarter follow up report
- LCP & WIB employer forum

January 31, 2015

- Employer visits continue
- LCP & WDD weekly meetings
- 2<sup>nd</sup> quarter progress report
- 2<sup>nd</sup> quarter follow up report
- Report on increase of workforce services to employers
- LCP & WIB employer forum

April 30, 2015

- Employer visits continue
- LCP & WDD weekly meetings
- 3<sup>rd</sup> quarter progress report
- 3<sup>rd</sup> quarter follow up report
- WDD report on increase of workforce services to employers
- LCP & WIB employer forum
- Approve renewal of contract for another 12 months

June 30, 2015

- Employer visits continue
- LCP & WDD weekly meetings
- LCP & WIB employer forum
- 120 unique employer visits completed
- Begin work on annual publication

### **Acceptance Criteria**

Deliverables of this project that will require Workforce Development acceptance will be the responsibility of the Workforce Development director:

- Survey questions as they relate to workforce development issues;
- Agreed upon marketing message;
- Monthly report templates;
- Customer relationship management tool access;
- Website.

Deliverables of this project that will require Workforce Investment Board acceptance will be the responsibility of the WIB manager:

- Industry sectors to target;
- List of employers;
- Quarterly progress reports;
- Quarterly forum venue & agenda;
- Annual business retention publication.