

Channeling Good Ideas Into Jobs

**Workforce Partnerships that Support
Entrepreneurs and Small Businesses**



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Welcome to this Toolkit designed to assist you in building strong partnerships between the workforce development system and small business-serving organizations to strengthen entrepreneurship and self-employment in your community.

Background

Few local areas and fewer States have developed a comprehensive approach to support both entrepreneurship at the level of One-Stop Career Center jobseeker services, and small business development at the level of Business Services. However, innovative workforce system leaders have developed useful approaches for one or the other: either identifying and serving entrepreneurs via jobseeker services, or working with community partners on small business development. This Toolkit suggests that the local One-Stop Career Center system selects and adapts some best practices from both ends of the services spectrum.

In all cases, researchers found that an important key to success has been actively partnering with economic development, Chambers of Commerce, business schools and Small Business Development Centers on a mutual mission to improve the system of services for entrepreneurs from start-up through small business growth and success.

ETA compiled promising practices from a variety of market types and sizes into a draft “Small Business Partnerships Toolkit” for field review. Onsite reviews were held in Monterey County CA, Abilene TX, and Brevard County FL. Additional feedback was received in phone interviews with early practitioners in markets where entrepreneurship appears to be strong, such as Austin TX, Dayton OH, and some former Project GATE areas.

Each site visit consisted of approximately a day and a half of facilitated feedback meetings with a broad cross-section of stakeholders: workforce leaders, managers and staff, and their peers from Small Business-serving Organizations including SBDCs, Chambers, community colleges, business incubators, Community Development Corporations and other non-profits, universities and other business schools. Their contributions have been invaluable to ETA’s understanding of effective Small Business Partnerships, and have substantially informed this version of the Partnership Toolkit, newly titled, Channeling Good Ideas Into Jobs: Workforce Partnerships Supporting Entrepreneurs and Small Businesses.

Our sincere thanks go to the many workforce professionals, executives and thought leaders interviewed during our research for this Toolkit. Space prohibits naming them all, but the contributions of the individuals below informed much of the content that follows.

A special thanks to...

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STEP-BY-STEP CHECKLIST

Look for the Steps

How to Use This Toolkit*

As the economic driver of the 21st century, small businesses and the organizations that serve them are critical partners to the workforce development system. Workforce leaders

can use this Toolkit to convene and facilitate a Small Business Partnership comprised of small business-serving organizations, such as Small Business Development Centers (SBDCs), Chambers of Commerce, business incubators, etc.

The goal of such a partnership is to ensure a “no wrong door” approach to the services an individual needs to start a small business, and to develop it to become a successful employer.

The Toolkit is arranged in a step-by-step fashion for use by the facilitator and by the partnership as it develops, decides and deploys a plan to support small business in your community. This section and the Appendix are of particular interest to workforce system facilitators and leaders, as they contain some policy and publications from the Employment and Training Administration.

The rest of the Toolkit and Appendix are for everyone interested in partnering around the needs of entrepreneurs and small business.

You are encouraged to imitate and innovate at will: pick what works for you from the guidance, suggestions and practices of the pilot sites as they planned and recruited partners, shared information about their services, identified goals and took action to improve opportunities for their entrepreneurs and small businesses.

**Facilitators see page 4 and the special Appendix section, “Facilitation Tools”*

In these pages you'll find:

Step-by-Step Checklist. The checklist provides a simple chronology of activities that pilot practitioners found useful for their Small Business Partnerships. Use it as a pullout for facilitator to-do's, or for partnership status reports. Each Step then has its own section which includes some or all of these:

- ✓ **Worksheets** to assist with the local decision points to be considered, as you adapt promising practices for supporting small businesses.
- ✓ **Examples** from pilot practitioners. Who better to help you understand the goals and potential of Small Business Partnerships, than people who are already working in them? The Toolkit contains a number of real-life examples from entrepreneurs, business organizations and workforce development professionals.
- ✓ **Samples** of agendas, meeting invitations and other practical tools to help facilitate your partnership.
- ✓ **Resources** linking you with a multitude of promising practices and tools for convening, facilitating, partnering, goal-setting, collaborating and sustaining a winning Small Business Partnership.

Appendix. Additional auxiliary resources, organized around three topics areas:

- ✓ Facilitator Tools
- ✓ Business Services for Small Business Partnerships
- ✓ Policy Matters

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Workforce Partnerships that Support Entrepreneurs and Small Businesses

Considering Performance:

West Central Texas

It's normal for agency directors to worry about performance whenever a new undertaking develops. But when the Workforce Board of West Central Texas began exploring ways to support entrepreneurship a few years ago, performance wasn't a factor.

"It was never about what kind of performance we're getting out of this," said Mary Ross, director. "Our board prefers to be more strategic. After all, performance definitions and measures change about every three years. But how do we grow the local economy? That's what matters, and this is a project that does that."

The whole Small Business Partnership concept - growing entrepreneurship, supporting small business development - "is long-term survival for the workforce system," Mary said. "You've got to do the right thing for the right reasons regardless of performance."

Customers of the One-Stop Career Center can be assessed for their entrepreneurship skills, right along with job skills. "While we have to determine WIA eligibility, we will not be restricted to serving only WIA-eligible individuals and we are committed to doing the eligibility determination in a way that is as unobtrusive, non-bureaucratic as possible," she said. "So this will not be seen as a workforce program, but rather as a network of resources to support entrepreneurship."

A Word About Performance ...For Workforce Development

The Workforce Investment system is designed to measure the number of people who enter traditional employment. Self-employment can be measured, but it's harder to do. "Entered employment" is measured through the Unemployment Insurance (UI) wage record, which self-employed individuals don't have. Even if they're self-employed and working a job on the side, the UI wage record tells you nothing about their status as a successful entrepreneur.

Policy leaders are examining ways to make the performance reporting system more responsive to the emerging importance of self-employment and entrepreneurship, including:

Supplemental data: In the Appendix is a presentation from the Employment and Training Administration (ETA), "Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System" advising that "entered employment," "retention" and "youth placement" measures may be calculated using supplemental data.¹ Granted, it's a bit more work. But it is being done by innovators who value entrepreneurs as tomorrow's employers.

Negotiating targets: Unfortunately, no alternative or supplemental data is allowed for reporting "average earnings," so the UI wage record doesn't reflect what's happening for your entrepreneurial customer. While ETA seeks a long-term solution to this, innovative workforce systems are citing this as a legitimate factor in negotiating performance targets for "average earnings" at the state level.

¹ For more information on this subject, please refer to TEGL 12-10 in the Appendix and at http://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=2957

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A Word About Performance ...For Your Potential Partners

Like you, many of your partners have compliance and performance concerns. It's good practice to consider the impact on these factors when facilitating a Small Business Partnership.



For example, SBDCs must serve anyone interested in starting a business, and may not say whether a business idea has merit or not. The SBDC's performance measures include:

- "...the number of firms that opened for business in the year reported after having received business management assistance from the SBDC."
- The aggregate number of dollars of SBA guaranteed loans, non-SBA guaranteed loans and equity investment that a client obtains in the reporting year. It is a reflection of the SBDC's ability to prepare and assist the client with business management assistance and loan documentation necessary to obtain credit or investors."
- Cost Per Small Business Created.²

Given these measures, it's easy to see that SBDCs must focus their resources on serving entrepreneurs who are very likely to open a business and qualify for financial assistance *within a year*. Many SBDCs balance these mandates by offering everyone some ongoing classroom instruction on entrepreneurship, while providing one-on-one business management assistance to those at the highest levels of readiness.

Your commitment to Small Business Partnerships will foster the creativity of untold numbers of entrepreneurs and enhance support for small businesses in need of employer services. We believe you'll be richly rewarded not only in your personal mission satisfaction, but in the long-term impact on the people and communities you serve.

For more information about this Toolkit, see the Employment and Training Administration links at businessengagement.workforce3one.org, and thanks again for your interest.

² ExpectMore.gov

A Word to Facilitators

We hope you'll find this Toolkit helpful in facilitating your local Small Business Partnership. As the economic driver of the 21st century, small businesses and the organizations that serve them are critical partners to the workforce development system.

Equipped with the best practices of effective partnerships shown in this Toolkit, your commitment to Small Business Partnerships will foster the creativity of untold numbers of entrepreneurs and enhance support for small businesses in need of employer services. We believe you'll be richly rewarded not only in your personal mission satisfaction, but in the long-term impact on the people and communities you serve.

The Appendix is of special interest to Facilitators, containing some workforce system-specific resources, policy documents, tools and templates to adapt for your Small Business Partnership. The Appendix is sorted into three sections:

- **Facilitation Tools** includes sample invitations and agenda for your Small Business Partnership. We suggest pulling the leadership group together first around the partnership Toolkit, followed by a meeting of the core group - managers and key staff - to work through the implementation planning. There's also a sample Memorandum of Understanding for use when your partnership is ready to collaborate more formally.
- **Business Services for Small Business Partnerships** is designed as a pull-out section you can discuss with your Business Services or Employer Services staff. Discussion, examples, and a worksheet help identify what services your Business Service Representatives can provide to help entrepreneurs and small businesses with human resources assistance, and how to share this valuable service with your Small Business Partners and their clients. Finally, be sure to subscribe to Workforce3one.org, the online resource repository of the Employment and Training Administration. You'll receive notices whenever webinars, podcasts, live chats or new resources are available to further enhance your Small Business Partnership.
- **Policy Matters** has a summary discussion of policy-related issues including a brief background on this Toolkit and a list of ETA Resources online, slides from a November 2010 ETA presentation, a Project GATE summary, and the full text of TEGL 12-10 concerning the workforce system's role in supporting entrepreneurship and small business development.

Now, let's dive into that 10-Step Checklist!

STEP-BY-STEP
CHECKLISTLook for
the Steps

Step-By-Step Checklist

□ Step 1: Why Build a Small Business Partnership?

Learn about the background and value of Small Business Partnerships, and how they collaborate to provide a “no wrong door” approach to services supporting entrepreneurship and small businesses.

Example: Meet John Porter: He’s already networking with other small businesses, page 7

Discussion: Distinguishing Self-employment, Entrepreneurship, Small Business, page 9

Example: Meet Mike Mikeworth: The story of an entrepreneur, page 9

□ Step 2: Identify Your Potential Partners and Readiness

Learn about what responsibilities a partnership might include and how ready you are to join.

Resource: Descriptive list of potential partners with URLs for each organization, page 10

Worksheet: How ready is your workforce system for a small business partnership? page 13

Worksheet: How ready is your organization to become a partner? page 14

Resource: Discussion - Preparing Business Services to Partner, page 15

□ Step 3: Prepare to Recruit Partners

Consider and determine what partners and services you want involved, then develop a concise pitch to recruit partners.

Example: Brevard Workforce’s Elevator Speech, page 16

Worksheet: Create your own “elevator speech” to pitch to potential partners, page 17

Worksheet: Identify the benefits of collaboration for each potential partner, page 18

□ Step 4: Learn How to Build Great Partnerships

Examine principles that support successful partnerships and consider how to establish strong, regular meetings.

Resource: Chart of philosophical and practical foundation keys, page 19

Example: A look at the Small Business Charleston Resource Network, page 20

Resource: Discussion of “The Practical Meeting,” page 21

Sample: First-year calendar of activities with a look ahead to year 2, page 21

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□ **Step 5: Establish Goals for Your Partnership**

Create SMART goals for a “no wrong door” approach to supporting entrepreneurs and small businesses.

Resource: A best practice for partnership: agree on broad standards first, page 22

Example: Monterey County set clear goals with timelines and accountability, page 23

Resource: Discussion of SMART goals and how to set them, page 24

□ **Step 6: Identify Decision Points and Begin Planning For Action**

Discover what pilot practitioners have discussed, decided and acted upon in their partnerships.

Example: Brevard Workforce identified and started 3 key projects in 2 months, page 25

Worksheet: A chart lists ideas from the pilot sites and invites you to plan action, page 26

□ **Step 7: Learn What’s Already Available for Local Entrepreneurs**

See why resource listings and/or asset mapping are logical first steps for your partnership.

Resource: Descriptive links to asset mapping tools from ETA, page 27

Example: Monterey County partners learn from each other and map the gaps, page 28

Resource: Chart of fields for a common contact database of your partners, page 28

□ **Step 8: Plan Your Partnership’s Staff Training**

What they need to know and when they know it, to ensure quality referrals within your partnership.

Worksheet: Develop a plan for who trains whom, when and where for frontline staff, page 30

□ **Step 9: Plan Your Mutual Public and Media Outreach**

Review marketing principles and tools to get the word out to entrepreneurs, small business, partners and supporters.

Example: West Central Texas shares their outreach strategies, page 32

Resource: List of website samples and links to collaborative websites, page 32

Resource: Learn how social marketing is advancing entrepreneurship, page 33

Resource: How to hold an Entrepreneurship Fair as a partnership, page 34

□ **Step 10: Get Tools for Building and Sustaining the Partnership**

Know what to expect as your partnership develops impact – and gets growing pains.

Example: The Partnership in Action, Monterey County, page 35

Resource: Chart of Tuckman’s group dynamics model (forming, norming etc.), page 36

Resource: Be proactive about communicating, some simple tips, page 37

STEP-BY-STEP
CHECKLIST

STEP
1

Why Build a Small Business Partnership?

As a leader who cares about the community and people you serve, you may have experienced the challenge of

having more jobseekers than job openings. Or, you may simply see how entrepreneurship fits naturally into the matrix of workforce development, economic development and quality of life for your community.

Across the country, business people like John Porter are joining forces with other community leaders from workforce and economic development to improve the entrepreneurial environment in their communities. These Small Business Partnerships are identifying what local entrepreneurs and small businesses need to succeed, and working together to ensure the right services and supports are available at the right time in the business development process.

Many workforce leaders say it just makes sense to work together to support small business, based on the conclusions of a growing body of research:

- Nationwide, small businesses³ represent 99.7 percent of employers, employ just over half of all private sector employees; and account for 44 percent of total U.S. private payroll. In the past 15 years, small businesses have generated 64 percent of net new jobs.⁴
- “Studies for a couple of decades have indicated that about seventy percent of students in the U. S. schools desire to ultimately become a business owner. Entrepreneurs are perceived as the ultimate work in the USA.”⁵
- “During the current recession, the quickest segment to recover is the individual entrepreneurs. Between 1996 and 2004, aspiring entrepreneurs in the United States created an average of 550,000 small businesses every month.” *Ibid*

Meet John Porter...

A Florida businessman who owns several small businesses, John Porter says he is not a strong day-to-day manager. Yet besides owning successful small businesses, he co-chairs the Space Coast Energy Consortium, a local group driving energy-related economic development – and he mentors other start-ups in his community of Brevard County, Florida.

John recently joined a Small Business Partnership convened by Brevard Workforce. “I may not be the best day to day manager, but I know how to find the people who are,” Porter recently told his business-serving partners. “Entrepreneurs need to network to find solutions.”

That’s one of the “secrets” behind the success of Porter World Trade and his other companies. He’s so convinced of the value of face-to-face networking and sharing of knowledge and resources that he’s donating office space and his own time to mentor a half-dozen other entrepreneurs in his home town of Cape Canaveral, Florida.

³ The Small Business Administration defines “small businesses” as firms employing 500 or fewer individuals.

⁴ U.S. Dept. of Commerce, Bureau of the Census: Statistics of U.S. Businesses, Current Population Survey.

⁵ *Career Ready with Entrepreneurship...a Key 21st Century Skill: A Call for Entrepreneurial “GENIUSES” for the Workplace*, released by the Consortium for Entrepreneurship Education for National Entrepreneurship Week 2010, February 20-27, 2010

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As the workforce investment system supports the nation's economic recovery, providing entrepreneurship and self-employment training and assistance in a more systematic and strategic fashion is another way the system can leverage its resources to support unemployed and underemployed workers and create jobs.

The journey of a small business or an entrepreneur is rarely linear. The Toolkit provides a sequence of linear steps, but you should feel free to customize the partnership in whatever fashion works best. By meeting regularly to share information, your team will be able to work through the Steps in the Toolkit to establish your partnership. Then, by collaborating to meet the needs of customers, small business-serving organizations can ensure that every potential entrepreneur and small business owner gets the *right* answer to a key question:

***“Where can I get the help I need now,
for this stage of my business development?”***

The ideal goal of your Small Business Partnership is to effectively provide a “no wrong door” approach to entrepreneurial services – that the individual just considering entrepreneurship, and the small business owner ready to hire employees, can enter anyplace within your Small Business Partnership and receive quality services and/or referrals that are appropriate to his or her level of business development.

Important to the process is grasping some of the key terms used in this Toolkit: self-employment, entrepreneurship and small business.

Meet Mike Mikeworth...



Since he entered the workforce at age 11 selling newspapers, Mike Mikeworth's jobs have ranged from factory, maintenance and convenience store work, to multiple-store coordinator, regional sales manager, and director of workforce development — with side trips into pastoring and music. He also founded a faith-based non-profit, Just People, Inc., that helped people get jobs and resources. In 2004, following the loss of a major contract, he started down the road to self-employment. He opened Synergos Consulting and did a "potpourri of stuff" for pay, from consulting to presenting original music at local churches and more.

However, he always wanted to start a more formal business, partly to be able to help and employ others. He talked to a friend in another state who had raised eight kids on a glass-cleaning business. A couple of tutorial visits and \$300 worth of equipment later, Mike began walking into buildings that had dirty windows, business cards in hand.

Today Mike, who has three children with his wife of 38 years, Linda, occasionally employs help in his growing Abilene, Texas small business. Clear Image (www.clearimage.com) has expanded to include specialized services like polishing Plexiglas and tackling hard-water stains. Mike, who turns 60 in December 2011, hopes to be able to offer jobs to the types of men he mentors personally "who have a hard time getting work" — men out of prison, for example, or who have struggled or are struggling with addiction.

Distinguishing Self-employment, Entrepreneurship, Small Business

Figuring out the lines between self-employment, entrepreneurship and small business can quickly turn into a game of who's on first. For example, all small businesses are started by entrepreneurs, but not all entrepreneurs want to expand beyond self-employment to build a small business. In fact, someone can be entrepreneurial without ever progressing to having what we, for the purposes of this Toolkit, would consider to be a small business: an established entity with a recognizable fiscal structure pursuing a published business plan.

Mike's story is a wonderful example of the three distinctions mentioned above: He fits the bill of **self-employment** with his potpourri of work under Synergos Consulting; he demonstrates **entrepreneurship**, the practice of starting a business, with Synergos and in exploring his friend's glass-cleaning business then establishing his own — employing entrepreneurial skills he learned when he started up the non-profit Just People Inc. from scratch. And Clear Image is more obviously a **small business**, with a defined structure, plan and desire to grow to hire employees.

What's most important is that wherever an entrepreneurial-minded person falls in this spectrum, he or she receives the right support to succeed. "Getting people connected to other people and resources is a big role" for Small Business Partnerships like the one in Abilene, said Mike, who also works part-time in workforce development.

By becoming familiar with what other local small business-serving organizations offer, any partner could help any entrepreneur progress — simply by referring him or her to the partner whose services match that customer's immediate need. Thus entering any partner's organization would effectively open a door to all of them, and to all their services. Helping your Small Business Partnership effectively provide this "no wrong door" approach for entrepreneurs is exactly what this kit is designed to do.

So what's your next step? Identifying your potential partners, and determining how ready you are to begin that journey.

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STEP-BY-STEP CHECKLIST

STEP 2

Identify Your Potential Partners and Readiness

Considering Potential Partners

Before you can recruit for your Small Business Partnership, take a good look at the small business-serving organizations available in your area to decide which to target. The number and type of such organizations vary widely from one community to another, but below is a list of possible partners and services, organized according to their respective funding streams.

Small Business Administration (SBA)

- **Small Business Development Centers (SBDC)**
www.asbdc-us.org

Located in every state and usually affiliated with a university, college, or business school, SBDCs provide free technical assistance and low-cost training to current or prospective business owners.

- **SCORE, Counselors to America's Small Business**
www.score.org

A nonprofit association dedicated to educating entrepreneurs and the formation, growth, and success of small businesses. More than 10,000 working and retired executives and business owners voluntarily provide counseling and workshops online and in nearly 400 chapters nationwide.

- **Women's Business Centers (WBC)**

www.sba.gov/content/womens-business-centers

The mission of these nearly 100 educational centers designed to assist women to start and grow small businesses is to "level the playing field" for women entrepreneurs through management and technical assistance. With special focus on women who are economically or socially disadvantaged, they offer comprehensive training and counseling in many languages.

- **Veterans Business Outreach Program (VBOP)**
www.sba.gov/content/veterans-business-outreach-centers

This 16-organization partnership is designed to provide entrepreneurial development services such as business training, counseling and mentoring, and referrals for eligible veterans owning or considering starting a small business at regional Veterans Business Outreach Centers (VBOC).

- **U.S. Export Assistance Centers -**

www.sba.gov/content/us-export-assistance-centers

This 16-organization partnership is designed to provide entrepreneurial development services such as business training, counseling and mentoring, and referrals for eligible veterans owning or considering starting a small business at regional Veterans Business Outreach Centers (VBOC).

- **SBA Financing -**

www.sba.gov/financialassistance/borrowers/role/index.html

Staffed by professionals from the SBA, the U.S. Department of Commerce, the U.S. Export-Import Bank, and other public and private organizations, the U.S. Export Assistance Center supports small and medium-sized businesses with export assistance to compete in today's global marketplace for small- or medium-sized businesses.

- **Certified Development Company (CDC) -**

www.sba.gov/content/cdc504-loan-program

The SBA does not make loans, but rather guarantees loans for qualified small businesses. Programs that may be accessed through any SBA office or SBA-funded center include debt financing, surety bonds, and equity financing; 7(a) loan program for "brick and mortar" financing; the Microloan Program (maximum of \$35,000); Surety Bond Guarantee (SBG) Program and the Small Business Investment Company (SBIC).

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Department of Commerce

- **Minority Business Development Agency (MBDA)**
www.mbda.gov

A network of minority business centers and strategic partners that support minority business owners who wish to grow their businesses in size, scale and capacity.

Department of Education

- **State Vocational Rehabilitation Programs** -
www.ed.gov/policy/speced/guid/ras/tac-00-02.pdf

These programs help eligible participants with disabilities explore the marketplace, develop a viable business plan, get necessary accommodations, obtain items necessary for business start-up, connect with community resources (including funding sources), and explore other activities related to entering self-employment.

Department of Veterans Affairs

- **National Veterans Business Development Corporation**

www.veteranscorp.org

This organization helps veterans receive access to capital, entrepreneurial education, electronic marketplace, access to services, and business networking.

- **Center for Veterans Enterprise**

www.vetbiz.gov

This organization offers entrepreneurial veterans and service-disabled veterans support for economic empowerment and resource assistance for considering business ownership.

Other

- **Chambers of Commerce**

www.chamberfind.com/index.asp or
www.uschamber.com/chambers/directory

Chambers of Commerce are organizations centered on furthering the interests of businesses and advocating on behalf of the business community. Chambers are not affiliated with government; local businesses are members.

- **Business Incubators**

www.nbia.org/

Business incubators provide business support resources and services, including office space in a fixed location, through the 1900-member National Business Incubation Association's network of contacts. Usually sector-focused, incubators vary in the way they deliver services, organizational structure, and the businesses they serve.

- **Community Development Corporations (CDC)**

nw.org/network/

Not to be confused with the similarly-named SBA partner, these CDCs are not-for-profit organizations incorporated to provide programs, offer services and otherwise promote and support community development in a specific geographic location such as a neighborhood or a town. Often focused on serving lower-income residents or struggling neighborhoods, their activities may include economic development, education, community organizing and real estate development.

Consider Capacities for Partnership

Typically, the agreement to share information, customers, services and outcomes among partners in a Small Business Partnership is a non-financial agreement. However, all the partners will need to invest some time and effort in the relationship building, knowledge exchange, staff training, and other activities that go into developing a Small Business Partnership. The workforce system invests additional effort in serving as convener and facilitator.

Therefore, it's worthwhile for all the potential partners to consider their capacity for participating in an active, collaborative partnership. Can the CEO take time to attend the most critical meetings, get to know peers within the partnership, and delegate an appropriate staff person to support action items on whatever goals the partnership sets? Consider also your staff members' relationships with partner staffs. Do they already know one another? How easily can new relationships be forged to ensure quality referrals among your Small Business Partners?

Finally, and very importantly, what does your organization bring to the table to help support the partnership's goals? For example, the One-Stop Career Center can package Business Services to address the first-hire and first-growth needs of entrepreneurs who are ready to become employers. A business incubator may provide mentoring, etc.

Evaluating your organization's partnership readiness is a fairly individual venture — but we can suggest some questions to help you get started. On the next page you'll find a worksheet that, when completed, indicates how ready your local workforce system is to convene and facilitate a Small Business Partnership.

On the page after that, a similar worksheet is provided to help guide other potential partners in assessing their readiness to partner. Facilitators may want to make copies of this generic readiness tool, to use as a leave-behind after your initial outreach meeting with each small business-serving organization.

In either case, the result will guide you whether to move on to Step 3, or if not, to determine what you need to do to get ready.

How ready is your **workforce system** to **convene and facilitate** a Small Business Partnership?

Beside each statement below, please write the number that best indicates your current status.

Scoring:

- 5 - This is already in place
- 4 - We are already in process of putting this in place
- 3 - We are committed to putting this in place but we have not yet begun
- 2 - We have some concerns about our ability to do this that must be resolved
- 1 - Not a current priority or possibility

Relationship building:	Our Workforce System leadership is open to partnering with small business-serving organizations.	
	Our leadership has good relationships with the leaders of some organizations that serve entrepreneurs and small businesses locally.	
	Our managers have good relationships with the managers of small business-serving organizations.	
	Our intake staff knows the intake staff at small business-serving organizations.	
	Our public relations staff has good relationships with the public relations staff of organizations that serve entrepreneurs.	
Our organization can supply our partners with:	Generous promotion of their services to customers of the One-Stop and our other partner organizations.	
	Space to co-locate services, if appropriate.	
	Referrals of entrepreneurial candidates who have been pre-qualified through an appropriate assessment process.	
	Staff cross-training to understand how to help each other's customers.	
	Listing as an eligible training provider.	
	Business Services including the human resources needs of new employers (first-hires and first-growth).	
TOTAL		
<p>If your total is:</p> <p>33 to 55: You have strong potential for success with Small Business Partnerships! You're ready to move on to Step 3, where you'll consider and pursue potential partners.</p> <p>23 to 32: It will take concentrated effort to create successful Small Business Partnership, but it will be a great addition to your efforts to support local growth. Consider spending some effort shoring up your relationships and resources either before or as you move on to Step 3.</p> <p>11 to 22: Work on developing some of the basic resources (time, relationships) before beginning to recruit partners for your Small Business Partnership.</p>		

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How ready is **our organization to partner with the public workforce system** in a Small Business Partnership to improve opportunities for entrepreneurs and small business?

Beside each statement below, please write the number that best indicates your current status.

Scoring:

- 5 - This is already in place
- 4 - We are already in process of putting this in place
- 3 - We are committed to putting this in place but we have not yet begun
- 2 - We have some concerns about our ability to do this that must be resolved
- 1 - Not a current priority or possibility

Relationship building:	Our organization's leadership is open to partnering with other small business-serving organizations.	
	Our leadership has good relationships with the leaders of some other local small business-serving organizations.	
	Our managers have good relationships with the managers of small business-serving organizations.	
	Our frontline staff members know the frontline staff at other small business-serving organizations.	
	Our public relations staff members have good relationships with their peers in other small business-serving organizations.	
Our organization can supply our partners with:	Generous promotion of their services to our customers and our other partner organizations.	
	Opportunity to co-locate services, if appropriate.	
	Referrals of entrepreneurs and small business customers/clients who have been pre-qualified through an appropriate process.	
	Staff cross-training to understand how to help each other's customers.	
	(what else can you contribute toward the goal?)	
	(what else can you contribute toward the goal?)	
TOTAL		

If your total is:

- 33 to 55:** You have strong potential as a Small Business Partner! You're ready to move on to Step 3, where you'll consider and outreach to more potential partners.
- 23 to 32:** It will take concentrated effort to succeed in a Small Business Partnership, but it will be a great addition to your customer/client services. Consider spending some effort shoring up your relationships and resources either before or as you move on to Step 3.
- 11 to 22:** Work on developing some more time, relationships, and resources for partnering, and periodically reassess your readiness to engage in a Small Business Partnership.

Channeling Good Ideas Into Jobs

Preparing Business Services to Partner

Besides serving as convener and facilitator, the public workforce system brings the One-Stop Career Center's Business Services Representatives (BSRs) to support your Small Business Partnership. The key is for these highly trained specialists to focus their broad and deep business knowledge specifically on the needs of small business.

Successful BSRs do this by surveying the tools and services they currently use with employers in general, and bundling those that are most useful to small business owners: guidance in planning for their employment needs, help with hiring, payroll management advice, and strategic thinking about their workforce needs. By supporting entrepreneurs from start-up with effective planning help, BSRs can help them grow and become employers.

The Appendix contains a section addressed to Business Services Representatives, with additional information and resources to support your BSRs' readiness to contribute to your Small Business Partnership.

Some business owners are satisfied with self-employment –skilled tradesmen are a good example - but many entrepreneurs sooner or later need to hire help to meet personal goals or new demands. That point often arrives during a period of sharp growth, when the entrepreneur can barely keep up with everyday work. There's no time to recruit, screen and hire the right employee – never mind manage payroll, secure benefits, or even write the job description.

Mike Mikeworth, for example, says his Abilene, TX window-cleaning business has already grown to the level where he needs steady help, but he hasn't hired anyone yet. His personal goal - to employ men who have a hard time getting work, such as ex-offenders or men with addiction backgrounds – has taken a back seat to keeping up with the 40- to 50-hours weeks he's been working on Clear Image. Add to that the part-time job Mike keeps with his former employer, and he doesn't have much time to come up with a plan for his first hire.

Here is where business services from the One-Stops or workforce investment boards can help, working with entrepreneurs to anticipate near-term and long-range employment needs, articulate job descriptions, manage recruitment, hiring and help with payroll related tasks.

Beyond that first hire, successful small businesses will face growth spurts. One big sales success can shoot productivity demands way beyond capacity almost overnight. The entrepreneur who was introduced to business services even long before the need arises, will be more likely to turn to the One-Stop when they're ready to hire.

Channeling Good Ideas Into Jobs

STEP-BY-STEP
CHECKLIST

STEP
3

Prepare to Recruit Partners

The most effective way to begin recruiting partners for your Small Business Partnership is to get everyone involved. Leadership, management, and staff from the workforce system, as well as any existing partners and new ones that come along, may suggest additional small business-serving organizations to expand and enhance the partnership.

So, how do you tell these prospective new partners what you are trying to accomplish? Simply use the worksheet below to develop and deliver a concise pitch about your Small Business Partnership.

It helps to identify the right person to “champion” the partnership at each of the organizations you want to pursue. Ideally, someone in your system already has a relationship with someone who works there, who can guide you to the right leader or manager to start the discussion. If not, the organization’s website or receptionist likely will provide a contact name you can use as a starting point. When you call to request an appointment, don’t be afraid to ask if he or she is the right person with whom to discuss partnering around entrepreneurial and small business services, or if there is someone more appropriate he or she would recommend.

Then, develop your pitch. In the marketing field, product descriptions are sometimes called “elevator speeches.” The elevator speech is a speaking technique where you describe your product to someone in the amount of time it takes you to get from the ground floor to the top floor in an elevator.

Use the following worksheet to answer a few questions that specifically describe the benefits of partnership. Specific benefits will go a long way in engaging the interest of the person to whom you are pitching membership in your partnership. The more specific you are, the more successful you will be in attaining critical buy-in.

Example: Elevator Speech Brevard Workforce

When Brevard Workforce began convening small business-serving organizations around the Toolkit, the local area was facing unprecedented layoffs as the nation’s Space Shuttle program came to an end. Lisa Rice, Brevard Workforce executive director, said when it came to supporting entrepreneurship, nobody in Brevard needed convincing. “It mattered to them, without me having to tell them why,” Lisa said.

But when she approached a small business-serving organization in Orlando, about an hour away, the concept took a little selling at first. “At first they said, ‘What...? Why does this matter to us?’ So with them I applied a regional approach,” Lisa recalled.

“This matters to you because entrepreneurs and small businesses emerging from this Brevard-based partnership are going to grow the community as a whole, and that’s a *regional* community we’re talking about,” Lisa emphasized. “When they get the support they need to become a second-stage entity, (the focus of this particular organization), they’ll be growing what you do, and the entire community around you.’ I also talk to them a little about the number of jobs that can come out of small businesses starting up, and also about the other support services we have already. It took me about 10 minutes to get them convinced, whereas the folks we called in Brevard got it right away: If we get a good connectivity with them, it’s going to make a difference in this economy.”

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What are you trying to accomplish through this Small Business Partnership?

Why does it matter?

How will it impact the community and/or who will it help?

Where does it help? Think geographically, demographically, and/or sector-wise.

There's just one more thing to consider before making your first approach to a potential partner: Take a minute to think like your target partners.

Ask yourself, "Will this target partner reap benefits from participating with your Small Business Partnership? What can this potential partner save, gain, or accomplish from participating in your Small Business Partnership?"

It can be useful to check websites, ask colleagues and jot down your thoughts about the benefits for each of the organizations and individuals you'll be inviting to join your partnership:

Benefits for:

Small Business Development Center	
Community college	
Chamber of Commerce	
Workforce staff	
Incubator	
Other stakeholders	

Now weave all your answers together, and you'll have a memorable elevator speech that puts you well on your way to having a productive discussion about working together on a Small Business Partnership. As soon as you've taken your speech(es) to target partners and gotten them on board, you're ready to get started building a great partnership in Step 4. Congratulations!

STEP-BY-STEP
CHECKLIST

STEP
4

Learn How to Build Great Partnerships

Now that your Small Business Partnership has some partners lined up, take a minute to explore how strong partnerships function. The chart below shows both the philosophical and practical foundation for successful partnerships of all types. Aim high for this ideal with your Small Business Partnership, and you'll soon be making a substantial impact on entrepreneurial success in your community.

Philosophical	Practical ⁶
Partners agree on mission , values, goals, and measurable outcomes for the partnership. ⁷	Schedule regular meetings. See the discussion immediately following this chart for ideas about establishing your future meeting schedule.
Mutual trust , respect, genuineness, and commitment characterize the relationships.	Prepare agendas in advance.
Strengths and assets are identified and built upon, and needs for improvement are addressed.	Rotate meeting locations among partners.
Power is balanced and resources are shared.	Send reminders 1 week and 2 days before.
Communication is clear, open and accessible between partners, who make it an ongoing priority to listen to each need, develop a common language, and validate/clarify meanings of terms.	Take notes and send an "Action Items" summary to all partners after each meeting.
All partners have input in establishing roles, norms, and processes with a goal of continuously improving the partnership and its outcomes.	Identify a champion to use his or her community visibility and influence to advocate for your partnership's goals.
Partners take time to develop and evolve their relationships over time.	Bookend meetings with networking time.

Clearly the central activity of an effective partnership is regular, useful meetings where members exchange key information about the services each has to offer. This sharing supports your mutual goal of

⁶ For more helpful information and samples of meeting agendas, etc., please see the Appendix.

⁷ For more on goal-setting with your Small Business Partnership, please see Step 5.

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creating a “no wrong door” approach where entrepreneurs and small businesses can easily access whatever services they need to succeed.

“If something like this group had been formed right when I started, my eyes would have been opened earlier to how we can work together. It’s been very beneficial.”

**Kara Browder, Interim Business Development Coordinator
Trident Workforce Investment Board**

The Small Business Charleston Resource Network⁸ is a South Carolina collaboration that assists entrepreneurs and small business owners. Convened by the Trident Workforce Investment Board (TWIB) and the Charleston Metro Chamber of Commerce, the Network consists of partners such as SCORE, South Carolina Technical College and others.

In Charleston, the Network members are getting to know one another’s organizations and exchanging information about their programs through the Network’s monthly meetings. Meeting with your own partners as a group provides the opportunity to link the individual organizations together in a partnership. It’s also an opportunity to share flyers, folders, and pamphlets both informational and in quantities suitable for posting where everyone’s clients can see them.

“Meet regularly, early and often,” advises Kara Browder, TWIB interim business development coordinator. “If something like this group had been formed right when I started, my eyes would have been opened earlier to how we can work together. It’s been very beneficial.”

The first time your partners get together is a crucial opportunity to learn about each other and establish a basis for future collaboration. Don’t assume everyone knows what each other’s organization has to offer. Schedule a presentation at each meeting from one of the partners, to introduce himself or herself, share the primary purpose of and a little background about his or her organization, and describe the services or resources offered for the local entrepreneur.

It might also be helpful for each partner to share how he or she hopes working with this partnership will specifically benefit his or her organization and its customers.

Next, discuss and establish some basic ideals on which your partners will agree to work together. Start with the philosophies in the above chart. Or discuss the success principle named by one member of a successful Small Business Partnership: “Everybody leaves their egos and logos at the door.”

We’ll have more great ideas from established Small Business Partnerships nationwide in later chapters.

⁸ www.smallbusinesscharleston.org

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**Workforce Partnerships that Support
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The Practical Meeting

During your initial meeting with your partners, seek agreement on a general plan for getting together in the future. Monthly meetings make sense when you are starting out, but eventually a quarterly meet-up can keep the partnership healthy.

In the Appendix you'll find sample meeting invitations and agendas. Build in time for frank discussion of how the partnership is working, and how successes might be leveraged for more resources. Twice yearly, evaluate your goals with your partners (see Step 5, "Establish Goals for Your Partnerships").

Here is a sample first-year calendar of activities and the corresponding steps in the Toolkit:

Time Period	Activity	Key Steps
First Quarter	Outreach Meet often to identify mutual benefits, develop partnership, set goals Communicate at least once a week	2: Identify Your Potential Partners 3: Prepare to Recruit Partners 4: Learn How to Build Great Partnerships 5: Establish Goals for Your Partnership
Second Quarter	Meet monthly Asset mapping Cross-train, deploy assessment and referral tools Package/promote HR for Small Business	6: Identify Decision Points and... Action 7: Learn What's Already Available 8: Plan Your Partnership's Staff Training Appendix: Business Services for Small Business Partnerships
Third Quarter	Meet 2-3 times Publicize Host Entrepreneur Fair or similar Measure progress Leverage successes	9: Plan Your ...Public and Media Outreach 10:...Building and Sustaining the Partnership
Fourth Quarter	Meet at least once per quarter Self-evaluate Generate publicity	5: Establish Goals for Your Partnership 9: ...Public and Media Outreach 10:... Sustaining the Partnership
Year 2	Quarterly meetings Regularly measure progress Collect success stories Leverage successes	5: Establish Goals 6: Identify ... Action 9: ...Public and Media Outreach 10:... Sustaining the Partnership

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Establish Goals for Your Partnership

As you plan and build your Small Business Partnership, keep your mission in mind: You want to effectively provide a “no wrong door” approach for the would-be small business owner to find services to help him or her thrive, thereby aiding economic development in your area.

Getting people to the right partner for the tools and expertise they need at the right time can make the difference between early burnout and entrepreneurial success. But as other Small Business Partnerships have found, it's not necessarily a straight-line process.

“There’s nothing linear about being an entrepreneur,” Mike Mikeworth says. “There’s some first steps, but you’re developing your skills, getting those little \$15 storefront accounts, learning bookkeeping, washing your own clothes, handling your marketing – you’re doing a multiplicity of things.”

Timing becomes very important to entrepreneurs. They may not have the time to look for services – or even clearly understand what services they may need at any given stage in their business development. Therefore, a key goal of your partnership should be the development of a strong network of services and referrals that help business people identify and meet these needs, *regardless of where they start*.

Other Small Business Partnerships have found success in supporting this mission when all the partners agree to cooperate, coordinate and collaborate on these goals and standards:

- **Build a broad partnership:** The broader the partnership, the more stable and less reactive to external changes it is. A network that includes a Chamber of Commerce, community college, SBDC, business incubator, and a local non-profit offers many entry points and service options for those exploring entrepreneurship. Consider asking your initial invitees, who else should be invited to the table?
- **Offer assessments:** Establish skills, knowledge and level of entrepreneurial development before enrolling or referring clients; see Appendix for links to useful assessment tools.
- **Provide varied, appropriate and effective training:** Entrepreneurial customers need every level from exploration through expansion: viable business plan, knowledge to implement it, courses in market research, marketing, pricing, financing, cash flow, accounting, hiring, permits and licenses, and legal issues; growth management courses for established small businesses.
- **Support entrepreneurs with ongoing technical assistance:** Provide business counseling, marketing support, mentoring, peer support or networking, individual development accounts, funding opportunities, business incubation, credit repair services, business libraries.
- **Ensure knowledgeable staff:** Plan cross-training or other means to ensure a solid knowledge base about entrepreneurship among all your partners’ staff members.

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Consider this list of projects undertaken by other partnerships, and start with “low hanging fruit” to build your momentum before tackling any hot potatoes. Keep mission in mind: How can your Small Business Partners collaborate to help entrepreneurs?

Example: Establishing Goals Monterey County

After several meetings and exchanging of flyers, the Monterey Small Business Partnership began to talk about more in-depth about the services they offered. They put together a matrix of 14 partners who provide a variety of entrepreneurial services. The matrix showed that some areas of the county had significant gaps in services.

“So we were able to identify the gaps, and the needs of those small business partners, and say to those in the room, ‘OK, who can help [fill in the gap for] that partner?’ Immediately we were able to create next steps, and we put a timeline in place over the next three months.”

Monterey distributed this chart to show their first round of goal-setting:

SMALL BUSINESS ORGANIZATIONS		
Timeframe: actual dates	What: be specific	Who: Use names
In the next 30-60 days	<ol style="list-style-type: none">1. Review and report on assessment options in the One-Stop Career Center system that identify entrepreneurial skills2. Link on WIB website for entrepreneur and small business resources3. Report on redevelopment “living laboratory” project to Exec Comm in May/June	Chris Berthiaume and Wil Moore Loyanne Flinn Loyanne Flinn

Set SMART Goals

While the specific goals of your Small Business Partnership are unique to your region or community, successful partnerships apply the principle of SMART goal setting:

Simple
Measurable
Attainable
Realistic
Time-bound

Periodically revisit your goals and discuss with your partners whether they need to be adjusted or adapted. SMART goals will also cue you and your partners to potential problems. For example, you might observe that a large number of out-referrals are not actually registering for training at your partners' sites, a possible opportunity for improvement to your referral system, data capture or services. Remember that one of the ways you can help your customers — and your community — through partnership is to help them grow beyond start-up status to where they themselves have jobs to offer. Work this into your SMART goals.

Now that you get the general principles of partnership standards and SMART goals, let's look at some specific things you can undertake together in Steps 6 and 7.



Identify Decision Points and Begin Planning for Action

As you meet and discuss your mutual interest in entrepreneurship and small business, your partnership will have many ideas for projects they can undertake together. Start with “low hanging fruit” to build your momentum before tackling any hot potatoes. Informing customers about opportunities for self-employment and entrepreneurship, connecting customers to partner resources such as business counseling and training, and adding one another to eligible provider or referral lists are some basic things you and your partners can do right away.

Here’s a list of additional questions that emerged early in the pilot partnerships. Discussion of these with your partners may prompt action plans that can yield great results for the entrepreneurs and small businesses in your community.

Example: Planning for Action Brevard Workforce

Within two months of their first meeting, small business-serving partners in Brevard County, Florida were already taking action on three products to improve opportunities for entrepreneurs and small business:

1. A desk guide for frontline staff showing all the partners’ services and target customers.
2. An online “triage” model where, by asking a few basic questions, anyone can tell exactly where an entrepreneurial customer should head to have his or her needs met.
3. Launch Inc., the debut of an Entrepreneur Club structured like a Job Club, but for potential entrepreneurs, start-ups and small businesses.

“The partners will all attend Launch Inc. to offer services, answer questions and identify more ways to help” the Entrepreneur Club participants, said Lisa Rice, Brevard Workforce executive director. “It’s so cool, and it all came out of this group just getting together and talking.”

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Questions to consider	Your notes
What services are available in our community to support entrepreneurs and small business? ⁹	
What assessment tool(s) should we use, and who will use them? ¹⁰	
Does co-location of some partner services make sense to improve efficiency and effectiveness?	
How should referrals be handled?	
Who will provide what training, for what types of entrepreneurs, when and where?	
How can entrepreneurship strategies be integrated into youth education and development activities?	
Are Individual Training Accounts or their equivalents able to fund entrepreneurship training? If not, can this be changed?	
What about supportive services?	
How will we promote our partnership and the network of service options? ¹¹	
What staff training is needed? ¹²	
How will business services representatives package and promote services especially for start-ups, first-hirers and small business expansion? ¹³	

Now, let's take a look at Step 7 for one activity that most Small Business Partnerships do early: Learn what's already available for local entrepreneurs.

⁹ See Step 7 for more on capturing and using the results of this particular partner discussion.

¹⁰ Your partners may already be using Assessment Tools of their choice; links to others are in the Appendix.

¹¹ Please see Step 9 – Plan Your Mutual Public and Media Outreach for more details.

¹² See Step 8 - Plan Your Partnership's Staff Training

¹³ See Appendix for more on how Business Services at the One-Stop Career Center can address partnership goals.

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Learn What's Already Available for Local Entrepreneurs

Most Small Business Partnerships quickly recognize a need for a good listing of resources already available in your community for entrepreneurs and small businesses. Compiling such data may become your partnership's first major project.

It makes sense to then organize the information in a way that easily shows where services are offered, as well as gaps – geographic or otherwise - in the services entrepreneurs need.

Asset mapping, also called resource mapping, is a systematic cataloguing of resources that may serve as your partnership's first step toward reducing duplication and filling gaps in services to support small business start-up and expansion. The Employment and Training Administration offers these tools and examples that may be useful:

The Asset Mapping Road Map provides guidance on how to conduct asset mapping within a region. Designed to help leaders understand the theory and practice of asset mapping and decide what level of asset mapping is appropriate, it provides an easy-to-use guide for implementation. Customized for regions participating in ETA's WIRED Initiative and adaptable to a variety of regional intents, the asset mapping road map can be found at:

www.doleta.gov/wired/files/Asset_MappingRoadmap.pdf.

The Metro-Denver Asset Mapping Tool designed by the 9-county Metro-Denver Region Workforce Investment Board can be easily adapted for any region to focus on their strengths, identify where there may be duplication, and identify gaps in services, talent and funding available in their region. This tool can be found at: www.workforce3one.org/members/getmfileinfo.cfm?id=393.

Example: Learning What's Already Available Monterey County

"Most of our partners were aware of each other, but they just didn't know the types of services they each offered, what motivated them, and the types of outcomes that are related to their funding," said Marleen Esquerra. As facilitator for the Monterey County Small Business Partnership, Marleen worked with the partners to create and distribute an online survey.

"Our goal was to compile the types of services that they offer, key points of contacts, and other basic information, so that we understood the services they have available to entrepreneurs," said Marleen. "And then, we also began to identify the types of gaps in services, and discuss how to fill them."

Whatever tool you choose to use to compile your list of local services, there is some basic information you should gather for each partner and service provider in your area.

- 1. Identify the POC:** Who will be the main Point of Contact (POC) for each partner? Often the person attending partnership meetings is the organization's leader, but a staff person is responsible for more day-to-day activities and services. Be sure to specify this within your partnership, to ensure good communications and referrals.
- 2. Gather and share basic info:** For each partner or other local organization included in your compilation, collect the following contact information:
 - *Organization Name*
 - *Executive's Name*
 - *Title*
 - *Mailing Address*
 - *Phone*
 - *Email*
 - *Service Location and Phone*
 - *Hours of Service*
 - *Services POC*
 - *Services POC Phone*
 - *Services POC Email*
 - *Organization's website*

This information is crucial to ensure a strong cross-referral network among your partners. But it's still just information. To take it to the next level, your Small Business Partners need to share customer referrals, services, and outcomes. Step 8 outlines a proven practice for fostering this kind of relationships among your partners: cross-training frontline staff to help identify and meet the needs of entrepreneurs and small businesses.

Channeling Good Ideas Into Jobs

STEP-BY-STEP
CHECKLIST

STEP
8

Plan Your Partnership's Staff Training

If your Small Business Partnership is to be effective in providing a “no wrong door” approach to entrepreneurial services, then all partners must understand the basic services provided by each partner to ensure that customers are appropriately referred.

Some partnerships have decided the simplest way to do this is to establish a Single Point of Contact at each partner entity, who will receive referrals from within the partnership. However, most Small Business Partnerships decide to ensure that all partners’ key staff members know about the services offered throughout the partnership.

This usually entails networking opportunities where staff members meet with their peers in the partner organizations, and exchange key information about the services offered by each partner. These training events should also cover how to accurately assess a customer’s needs and make an appropriate referral. Cross-training is usually the easiest way to do this.

“The more knowledgeable staff, the better. There’s no downside to cross-training. It’s a win-win for everyone.”

Lisa Rice, Brevard Workforce

These questions are designed to help you think through the best ways to get everyone's staff members up to speed on your Small Business Partnership:

What do your partners' managers need to know to support your partnership's mission?

What do your partners' staff members need to know?

You and your partners can set training times at each other's locations, or host a mutual training for all your front-line staff at once. Another simple cross-training technique is to set up mutual job shadowing appointments with your partners. That way, their front-line staff members get to see your services in action firsthand, and you get an in-person look at the services they provide your referred customers.

In some areas cross-training won't work because of geographic or other challenges that prove prohibitive for in-person training. In this case, try creative electronic training solutions like webinars and videoconferencing.

With your partners, consider these questions and your own logistics, and map out a plan for training each other's customer-service and other key staff members.

WHO will train whom?

WHAT training topics will be covered (e.g. assessments, referrals, customer service)?

WHEN & HOW will staff training take place?



Plan Your Mutual Public and Media Outreach

In building your Small Business Partnership, it is important you work with your partners to plan an outreach strategy to inform potential entrepreneurs of their expanded access to services. You'll also want to tell your story to local media, government and business leaders, all of whom can help you leverage your success and attract new resources for your partnership.

Your public relations/publicity staffs will have excellent suggestions for your outreach strategies. We suggest a meeting with your key partners and their PR staff to strategize, followed by an action plan that ensures mutual agreement and timely delivery of all outreach materials.

Outreach Possibilities to Consider With Your Partners and PR Departments

1) Create a Mutual Website

An important way to promote your partnership is with the creation of a Web site that touts your collaboration while providing helpful information for self-employment, entrepreneurship and/or small business ownership. On your partnership's site, consider including these tools for your customers:

- Lists of local, state and federal business requirements
- Announcements and calendar of local entrepreneurial events, classes and more
- Links to all partners' sites, ideally with a snapshot of services offered
- An E-form potential customers can fill out and submit about services they're seeking that can go to a Web site point of contact person who can help figure out what agency or agencies has the services best suited to each client's needs.

Example: Plan your outreach West Central Texas

In Mary Ross' region of west central Texas, a name carries a lot of weight. As director of the workforce board, Mary was committed that their small business partnership, while based in Abilene, would address the wider needs of the 19-county region and not just the population around Abilene.

"One of the things that we decided early on, is to give it a name that reflects the region and is sort of separate, a name that doesn't really belong to anyone but that actually could belong to everyone," Mary said. "So we came up with the idea of co-branding. We recognized that a lot of activities already exist, and we're not trying to replace any of those or compete with those resources. We're really just trying to establish a stronger connection and a linkage, and make it a smoother system for the entrepreneur and aspiring businessperson to access."

Activities of the partnership therefore carry their own name along with the phrase, "in conjunction with the West Texas Innovation Network."

"Our partners are excited about the idea of co-branding because it really establishes that this is a regional approach. That this is not just a whole collection of unrelated organizations but that it really is a network," she said.

In addition to traditional marketing with press releases and media tools, the network uses some social media through Facebook and others. They also will have a branded website where, Mary said, "an individual can access anything from SBA.gov resources, to foundations and organizations that provide lots of free resources and tools."

For some good examples, check out these collaborative web-based resources:

The Passaic County Business Workshop Directory is produced by the Workforce Investment Board at Passaic County (NJ) in partnership with Passaic County Community College, William Paterson Department of Continuing and Professional Education, and William Paterson Small Business Development Center. Located at www.wibpc.org/uploads/Full%20Web%20Version.pdf, the resource manual lists all the workshops available to the entrepreneur or small business owner, organized along developmental stages beginning at Entrepreneurial Assessment and continuing through Business Start Up, Business Plans, Business Growth, and Business Maturity.

The Florida Virtual Entrepreneur Center at www.flvec.com is a free web portal sponsored by the [Florida High Tech Corridor Council](#) and Daytona State College. Designed to connect entrepreneurs with business support organizations, programs and service providers who can support their new or growing business, the robust VEC is organized by county with thousands of national, state and local resources listed by topic within the categories of and then by interest in starting a business, expanding a business, or relocating a business.

The Small Business Charleston Resource Network hosts a website at <http://www.smallbusinesscharleston.org>. It serves as a clearinghouse of information on services provided by the partners including small business counseling, seminar education and guidance for securing financial backing.

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2) Use Social Media

You and all your partners should be Facebook friends, and should follow each other on Twitter and other social media sites. Twitter is especially useful for letting influential leaders in your community know about the services available through your partnership. Retweet each others' relevant announcements and cross-promote your services. Promote your Twitter feeds and Facebook pages in all your outreach materials. Share your LinkedIn pages too.



More about social media

The [Business Engagement](http://businessengagement.workforce3one.org) website at the Employment and Training Administration offers many resources and training modules about Social Media and its best uses in the business environment. We encourage you to spend some time reviewing all the resources available at businessengagement.workforce3one.org to share with your Small Business Partners.

We've highlighted several here to get you started:

- **Choosing the Correct Social Media Tool(s) to Meet Your Business Engagement Goals**

During this 10-minute training module you will learn how to select the correct social media tools to meet your organization's business engagement goals by answering three basic questions:

1. Who is your Audience?
2. What is your Message?
3. What Resources are available?

In addition, you will be provided with helpful practical tips as well as an inventory of free on-line tools to help you choose the correct tools to meet your goals.

- **Using LinkedIn to Engage Business & Connect to High-Skilled Job Seekers**

Workforce Solutions (Houston-Galveston, Texas) actively uses LinkedIn to network, support and promote their Aerospace Transition Center candidates. During this 28-minute training module, Veronica Reyes discusses why Workforce Solutions chose LinkedIn and demonstrates the robust capabilities of this free social media tool.

- **Social Media Policy & Use**

In a 2-minute video, David Roberts describes the Government Services Administration (GSA)'s government service agreements with a large variety of free social media providers. Many federal agencies have comprehensive policies regarding the use of social media, which can be adapted to your needs. David suggests, "If you can say this is good enough with the GSA then it should be good enough for your local manager."

- **Introduction to Social Media: Illinois WorkNet Center**

(www.illinoisworknet.com/vos_portal/business/en/Benefits/Social_Media)

This 5-part webinar series covers topics including: Creating a Social Media Strategy, Basics of Social Media, Social Media Tools, Alternative Resources on Twitter and How to Manage Your Social Media Image.

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3) Hold an Entrepreneurship Fair

Once your Small Business Partners have established partnerships and become familiar with each others' services, you are ready to begin receiving your customer referrals. That's a good time to plan, publicize and hold an Entrepreneurship Fair, a sort of partnership grand opening that includes VIP presence, as well as booths and representatives from each partner, and invites on-site and follow-up publicity and news coverage.

Your PR department may handle this alone, or want you to take the lead. In the latter case, below are some suggestions on how to have a great kick-off for your Small Business Partnership.

1. **Establish the location, date, and time for the event.** Select a location that is accessible, photo-friendly for podium speeches, booths and crowds. Demonstrate how every partner's "front door" now opens to the full array of partner services.
2. **Invite VIPs to attend the grand opening.** The bigger the VIP, the better the chance of press coverage. Don't be afraid to invite your mayor and other politicians; your partnership is cause for community celebration of potential economic development.
3. **Customize press releases to individual media outlets.** Also, insert quotes from the VIP and partners' administrators, staff, or customers and consider adding photos of the key VIP or other person(s) quoted (ensure proper permissions are on file). Keep in mind that most press accept, and many prefer, electronic submission of releases and high resolution photos, usually in J-peg format; check with each outlet on preferences.
4. **Send press releases about your announcement and fair at least three weeks in advance.** Then follow up with the media contact with a phone call.
5. **Draft a main agenda.** It should include a welcome by the leading VIP, introductions of all key players, and an overview of booths available.
6. **Draft a working agenda.** Intended for the people who have key roles in the event, a working agenda matches the main agenda and additionally includes detailed instructions for everyone's specific roles.
7. **Help with speeches.** Consider drafting talking points for your VIP(s). Be sure to include a champion who can speak highly of your Small Business Partnership.
8. **Invite your key partner executives to speak about their best "success story" customer.** Have at least one person give a firsthand account of the benefits he or she received as a result of the Small Business Partnership.
9. **Have someone take quality photographs and send the photos with a follow-up press release after the event.** The press release should include names and contact information for all the participating partners.
10. **Follow up with as many participants as possible.** Make sure each attendee gets a personal outreach from one of your Small Business Partners, an opportunity to ask questions, and if indicated, an appropriate referral for his or her next steps.

Through Steps 1-9, you've come a long way in establishing a strong partnership. In Step 10, we want to look at some ways you can strengthen the partnership so your work continues.

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STEP-BY-STEP
CHECKLIST

STEP
10

Get Tools for Building and Sustaining the Partnership

Example: The Partnership in Action Monterey County

The Monterey County WIB partnered with the Monterey County Office for Employment Training and the Redevelopment and Housing Organization (RHO) to host a Small Business Development Forum on April 6, 2011. The topics included:

- a. What does small business success look like?
- b. Challenges facing small businesses
- c. Action Plan – How can agencies contribute?

“The forum attendees included partners who attended our DOL toolkit field test, plus the Coast Rural Development Corporation which provides loans and capital to businesses; the City of Salinas, and the Salinas United Business Association (SUBA),” reported Loyanne Flinn, acting WIB director.

When the RHO partner expressed a desire to explore a “living laboratory” in an economically depressed area called Casterville, the partners agreed. Bringing together small business-serving organizations in the Central Coast Region, they are using the real world experience of a downtown small business development setting that has substantial language barriers, literacy challenges and more.

Many of Casterville’s small business owners don’t understand business bookkeeping or even the basics of supply and demand. So the partnership surveyed 125 households and reported on “who shops for what in Casterville, and where the leakage occurs and why. They discovered that the local restaurants and markets don’t have the best produce, which is a real irony since they’re right in the middle of the best farming country around. So they’re working with (the agriculture incubator partner) to get high quality low-cost produce at wholesale,” she said.

Meanwhile, “RHO is doing a makeover of Main Street businesses, while the SBDCs are working on their operational aspects,” said Loyanne Flinn, acting WIB director. “I had so much fun listening to the businesses talk about how excited they are about the changes that are happening.”

What would you guess are the top reasons why partnerships fail? Business blogs discuss this topic a lot, and next to purely financial reasons, the biggest factor is poor communication. After that come decision-making, documentation, and exit strategies.

Most of the time, partnering among professionals with a clear mission is not that difficult. But even the best groups go through identifiable phases that can be challenging. In 1965, social science researcher Bruce Tuckman proposed a developmental stage model describing changes in the life of groups over time.

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Tuckman’s model has been adapted slightly in the years since its original publication.¹⁴ But these four core stages – Forming, Storming, Norming and Performing – remain a classic description of group dynamics. As your Small Business Partnership grows, it will be important to understand and anticipate these group dynamics.

Stages of Team Development	Description	Leadership Role (Transactional Transformational)
Forming	Group members are “polite”, testing boundaries, attempting to define their roles Orientation, getting to know one another, and why they are on this team	Director/Facilitator Works with team members to establish clear roles and expectations, encourages full participation, provides process and addresses immediate needs of the team.
Storming	As team orients itself, differences arise around roles, task, personality styles, and other related issues Conflict arises and they learn to deal with conflict, as a group Ground rules and a code of conduct is established and roles are more clearly defined	Coordinator/Mediator Anticipates and addresses problems and conflicts, helps the team learn how to deal with conflict, surfaces key issues and helps the team work collaboratively to address them, keeps team focused on the task.
Norming	Roles are clear and task and expectations and goals are clarified More cohesion among group members as a result, and they are learning how to work together and be productive	Coach/Advocate Exerts influence in and outside the team to acquire necessary resources, treats each member with empathy and respect, creates an arena to explore and reframe challenges and problems, models and encourages self-leadership and learning.
Performing	The group is interdependent and feedback systems are in place to improve the group’s performance The goal is visible and the group adopts a “can do” attitude	Mentor/Advisor Acts as a resource and advisor to the team, shares observations and insights, recognizes each team member for their unique talent and abilities.

¹⁴ Tuckman, Bruce W. and Jensen, Mary Ann C. (December, 1977). “Stages of Small-Group Development Revisited”. Group and Organization Studies. Copyright 1977 by International Authors, B. V. Vol. 2, No. 4:

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Be Proactive About Communicating

Obviously, communication is key at each stage of group development. When it comes to communicating, human beings are remarkably prone to making assumptions, when in fact with just a little planning and thought we can make sure all the right people have, and understand, the right information. These simple communications can put you on the path to true community among partners.

- 1) **Add your partners to your list-serves** for your newsletters and announcements. Send personal letters of appreciation. Touch-base phone calls and e-mails are also helpful.
- 2) **Friend your partners** on each other's Facebook pages, and follow on Twitter where possible. Tweet news of each others' programs and services.
- 3) **Honor your partners:** Exchange letters of support and appreciation when they've done something notable. Feature partners in your newsletter or blog.
- 4) **Share the glory:** Periodically issue joint press releases highlighting the success of entrepreneurs who benefitted from your Small Business Partnership.
- 5) **Be there:** Attend your partners' events, and invite them to yours. Visit their services as appropriate, and welcome them to visit yours as well.

Conclusion

Before you started working with this Toolkit, your entrepreneurial neighbors may have been giving up on their big ideas, or moving elsewhere for lack of the “next right step” support they needed. Now, thanks to your commitment, they're finding it easier to identify and access the right services at the right time for growing their businesses. You may never know the full financial impact of your Small Business Partnership, but you hear the stories at every partner meeting: Questions answered. Dreams realized. Jobs created. Lives changed.

Way to grow!

Appendix

- A) Facilitation Tools
- B) Business Services for Small Business Partnerships
- C) Policy Matters

NOTE: A companion PowerPoint presentation featuring workforce leaders from the pilot sites and how they implemented the 10 steps is available for viewing online at businessengagement.workforce3one.org. You may want to select a portion of this presentation during your partnership meeting.

Sample: Core Group Agenda

(your workforce system)

Core Group

Sample Agenda

****day, May **, 2011

Objective:

The public workforce system will use the Small Business Partnerships Toolkit to build effective partnerships with small business organizations, to the end that One-Stop jobseeker customers are assessed and referred for entrepreneurship services where appropriate, and One-Stop employer services are targeted to small business needs.

9:00-10am Core Group – Introduction to Toolkit

Brief overview of Toolkit concept

10:00-12:00pm Full Leadership Group - Toolkit Review

- Large group review of Toolkit content
- Exchange organizational information - bring your organization's brochures

12:00-1:00

Lunch (on your own)

1:00-4:00

Staff Toolkit Review

Please send staff who will help implement items of the Toolkit. As a leader you are also welcome to stay for the day.

- In-depth review of Toolkit items, commitments and next steps.

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Sample: Leadership Group Agenda

(your workforce system)

Leadership Group

Sample Agenda

****day, May **, 2011

Objective:

The public workforce system will use the Small Business Partnerships Toolkit to build effective partnerships with small business organizations, to the end that One-Stop jobseeker customers are assessed and referred for entrepreneurship services where appropriate, and One-Stop employer services are targeted to small business needs.

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12:00-1:00pm Lunch (on your own)

1:00-4:00pm Staff Toolkit Review

Please send staff who will help implement items of the Toolkit. As a leader you are also welcome to stay for the day.

- In-depth review of Toolkit items, commitments and next steps.

Sample: Invitation (Core Group)

Send this invite to Core Leaders of Small Business Organizations who are current or potential partners

You are invited to take part in a collaboration of the Small Business Partnerships Toolkit, developed by the Department of Labor, Employment & Training Administration.

As a part of a core group of leaders we'd like to meet with you before the large leadership meeting. Also, please extend the invitation to your managers, supervisors, and line staff for the second half of the agenda starting at 1:00pm.

Dates/Times: 9:00 am to 12:00 pm ****day, May **, 2011

Location: Venue name, address

RSVP to: Name, phone, email

RSVP by: May **, 2011

Project Overview

The U.S. Department of Labor/Employment and Training Administration (DOL/ETA) provides technical assistance to the public workforce system on best and promising practices for supporting small business development. ETA envisions a range of practices beginning with entrepreneurship options for qualified jobseekers, to focused employer services for small business.

To this end, ETA developed a Small Business Partnership Toolkit for use by workforce areas interested in supporting small business. *(your workforce system)* has identified entrepreneurship as a priority and desires to convene a Small Business Partnership to review and adapt the Toolkit for local use.

As a prospective partner, you will have the chance to review the Toolkit and participate in a facilitated use of the tools to create a local implementation plan with specific goals. The overarching goal is to collaborate on a “no wrong door” approach for entrepreneurs and small business, improving their access to services and opportunities for success.

Attached is the Toolkit for your review prior to the meeting.

Sample: Invitation (Leadership Group)

Send this invite to Leadership group:

You are invited to take part in a collaboration of the Small Business Partnerships Toolkit, currently being developed by the Department of Labor, Employment & Training Administration.

Please extend the invitation to your managers, supervisors, and line staff for the second half of the agenda starting at 1:00pm.

Dates/Times: 10:00 am to 4:00 pm ****day, May **, 2011
Location: Venue name, address
RSVP to: Name, phone, email
RSVP by: May **, 2011

Project Overview

The U.S. Department of Labor/Employment and Training Administration (DOL/ETA) provides technical assistance to the public workforce system on best and promising practices for supporting small business development. ETA envisions a range of practices beginning with entrepreneurship options for qualified jobseekers, to focused employer services for small business.

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As a prospective partner, you will have the chance to review the Toolkit and participate in a facilitated use of the tools to create a local implementation plan with specific goals. The overarching goal is to collaborate on a “no wrong door” approach for entrepreneurs and small business, improving their access to services and opportunities for success.

Attached is the Toolkit for your review prior to the meeting.

Sample: Memorandum of Understanding

A Memorandum of Understanding can be useful for collaborative funding requests and for sharing certain information among partners. Just be careful not to rush into it. “Putting an MOU on the table right away, makes it look like a ‘pre-nup,’ like you’re expecting trouble,” said one Small Business Partner. “An MOU should memorialize what you’ve accomplished, rather than foretell what’s ahead.”

The sample MOU below is used by one workforce system to formalize its One-Stop Career Center partners. When the time comes to formalize your Small Business Partnership, just adapt the details to match your situation.

PURPOSE

This Memorandum of Understanding (MOU) is entered into between the _____ local Workforce Council, and the following partner agencies:

(List Partners)

The purpose of this MOU is to establish an agreement among the above mentioned parties concerning their respective roles and responsibilities for implementation of the provisions of section 121(c)(2) of Title I of the Workforce Investment Act of 1998.

This agreement is to coordinate resources to prevent duplication and ensure the effective and efficient delivery of workforce services in Workforce Service Areas. In addition, this agreement will establish joint processes and procedures that will enable partners to integrate the current service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to Workforce Service Areas.

Parties to this document shall coordinate and perform the activities and services described herein within the scope of legislative requirements and Section 8(C) of this document governing the parties' respective programs, services, and agencies.

INTRODUCTION

The parties enter into this agreement to ensure that the following principles of the Workforce Investment Act of 1998 are implemented.

Universal Eligibility - All job seekers, including those with special needs and barriers to employment, will have access to a core set of services at each WorkForce Center, designed to provide information to make career and labor market decisions. Core, intensive, access to training, and support services will be made available onsite.

WorkForce Center System Approach - All job seekers may explore work preparation and career development services and have access to information on a range of employment, training, and adult occupational education programs.

Individual Choice - Employers and job seekers will have access to a multitude of career, skill, employment, labor

market and training information to obtain the services and skills they need.

Greater State and Local Flexibility - With the integration of services through a WorkForce Center System, the State and local entities will have the flexibility to implement an innovative and comprehensive workforce investment system.

Greater Role for Elected Officials - State and local elected officials and WorkForce Center partners have the flexibility to tailor delivery systems to meet the particular needs of individual communities.

Greater Accountability - State, localities and providers will be accountable for their performance. The design and management of the WorkForce Centers and the delivery of services must be responsive to meeting the needs of the employers and job seekers.

SERVICES TO BE OFFERED THROUGH THE WORKFORCE CENTER SYSTEM

Services are described in the attached service table. (The services identified in the service table used in the Local Integration Plan will be modified and ordered by core, intensive and training services. Services provided by other new partners will be added and local areas may add any additional services.)

DURATION AND MODIFICATION

This MOU shall commence on the date it is executed and remain in effect until (date) or amended.

A partner may terminate their participation in this MOU upon 30 day written notice to the local Workforce Council, the local elected officials, and to all other partners to this MOU.

With the agreement of the local elected officials, this MOU can be amended, including the addition of a new partner, by mutual agreement of affected partners and the local Workforce Council. The amendment must be submitted to the partners prior to state submittal.

SERVICE FUNDING AND COST ALLOCATION METHODOLOGY

Methodology for the funding of services is identified in the attached service table. The methodology for allocating operating costs of the system among partners is also attached.

SYSTEMATIC REFERRAL PROCESS FOR WORKFORCE CENTER CUSTOMERS

Partner referral procedures are attached.

DISPUTE/GRIEVANCE RESOLUTION

Should any disputes or grievances over the MOU require resolution, the steps outlined in this attachment should be followed (a sample resolution attached).

OTHER PROVISIONS

Functions or separateness mandated by Federal, State or local laws, rules, regulations or guidelines will not be violated or abridged in the pursuit of co-location of center partners.

Client information with other system partners will be jointly shared, subject to confidentiality constraints and other program requirements.

All partners will be responsible for compliance with existing Federal, State and local laws, rules, regulations and program guidelines and directives.

(Describe the management structure the partners will use to oversee the system.)

(Local areas should add any additional provisions pertaining to their areas.)

CERTIFICATION

By signing this agreement, all parties agree that the provisions contained herein are subject to all applicable, Federal, State and local laws, regulations and guidelines relating to nondiscrimination, veterans priority of service, equal opportunity, displacement, privacy rights of participants, and maintenance of records and other confidential information relating to WorkForce Center System customers.

By signatures affixed below, the parties specify their agreement:

Chief Elected Official or Designee	Date
Local Workforce Council Chair	Date
(Center Partners)	Date

Business Services in Small Business Partnerships

Packaging Business/Employer Services For Small Business

This section of the Appendix is devoted to Business Services, an important value your One-Stop Career Center brings to the table of your Small Business Partnership.

Economists say that the new driver of economic growth is small business. Yet medium and large businesses are the traditional employer customers of the One-Stop Center. Your Small Business Partnership affords you a unique opportunity to shift selected services to focus on small business. By focusing on the needs of the entrepreneur making the first hire, or the small business facing its first growth surge, your Business Services Representatives (BSRs) can make significant contributions to small business success in your community.

Besides serving as convener and facilitator, the public workforce system brings the One-Stop Career Center's Business Services Representatives (BSRs) to support your Small Business Partnership. The key is for these highly trained specialists to focus their broad and deep business knowledge specifically on the needs of small business.

Successful BSRs do this by surveying the tools and services they currently use with employers in general, and bundling those that are most useful to small business owners: guidance in planning for their employment needs, help with hiring, payroll management advice, and strategic thinking about their workforce needs. By supporting entrepreneurs from start-up with effective planning help, BSRs can help them grow and become employers.

How Do You Find Your Local BSRs?

1. First, go to America's Service Locator at www.servicelocator.org
2. Type in the zip code of your local area.
3. A list of One-Stop Career Centers will be generated.
4. Click on the nearest Comprehensive One-Stop Career Center.
5. Scroll down and you will find the name, phone number and email of the Business Contact for that Center!

The Employment and Training Administration understands that Business and Employer Services vary widely across the public workforce system. Some WIBs, like Capital Area Workforce Board in Austin, Texas, have both a Business Services division and an Employer Services division.

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“Our Business Services exist at the Board level and include cultivating relations at the Board level with the Chamber, economic development, Labor Market Information, etc., finding out what the overall market needs are,” said Alan Miller, executive director. “Our Employer Services occur at the contractor level and consist of marketing the talent that’s been developed by the Career Centers. These reps know who needs what talent, and specialize in finding employees that meet their needs.”

Other workforce areas may have just one BSR whose primary task is matching job openings from local employers with resumes received at the One-Stop. The ETA recently launched an online resource, businessengagement.workforce3one.org, to foster discussion and share promising practices among Business Services Reps. Encourage your BSRs to explore the site, with an eye toward the special supports needed to help entrepreneurs and small businesses.

Have your Business Services Reps meet with your partners and keep them supplied with brochures and hand-outs referring their clients to you for employment services. Offer to make presentations for their clients, or create training modules they can integrate in the entrepreneurship services they already offer.

Should you have any questions about this Toolkit or if you need resources to support your work as a Business Services Representative, check out ETA’s Business Engagement website at businessengagement.workforce3one.org.

E-Tools for BSRs and Small Business-serving Organizations

If you haven't yet, be sure to explore ETA's Business Engagement website at businessengagement.workforce3one.org. There you'll find a variety of E-tools and resources for Business Services Representatives (BSRs), many of which may also be useful for your small business-serving partners to use when assisting entrepreneurs and small businesses with strategic decision making.

Here's a listing with descriptions of some of the E-Tools you'll find on the site:

Using E-Tools to Identify Occupations

Web Address of Tool: data.bls.gov/oes/

Description: This presentation demonstrates the use of Bureau of Labor Statistics' Occupational Employment Statistics program (OES) to investigate data on occupations, both nationally and in your area. The OES program is the government's most geographically-detailed source of information on detailed occupations (and the principal source for BLS and state employment projections). The OES program provides employment and compensation data on about 800 occupations (BLS just issued 2010 OES data), for the U.S., states, and metropolitan statistical areas. Since OES also collects data on detailed industries, this tool will allow you to identify the occupations employed in any single industry, and, conversely, all industries that employ workers in a single occupation.

Using E-Tools to Identify Growing Industries

Web Address of Tool: data.bls.gov/pdq/querytool.jsp?survey=sm

Description: This presentation will show you how to use the Bureau of Labor Statistics' Local Area Unemployment Statistics (LAUS) to investigate data on industry employment in your state or locality (including some 7,300 localities). For all states, and many localities, you can obtain industry employment data a little more than one month after the reference period. LAUS supplies data on both employment and unemployment, but this presentation focuses on employment alone. We explain several different ways by which BLS presents LAUS data, including tools that will allow you to produce customized tables, graphs and charts.

Using E-Tools to Investigate Industry Concentration Ratios

Web Address of Tool: data.bls.gov/location_quotient/ControllerServlet

Description: This presentation will show you how to use BLS's Location Quotient Calculator to compare a given locality's concentration of industry employment against that industry's share of employment in the nation, state, or metropolitan area. This quotient is sometimes used by economic developers to compare industries across areas. In addition to the Quotient, this tool also provides employment counts and the percentage distribution of employment within an area. The tool allows you to simultaneously compare three geographic areas, down to the county level.

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Employer Locator**Web Address:** www.careerinfonet.org/employerlocator/employerlocator.asp?nodeid=18**Description:** A tool to help you identify local employers in a specific industry, or to identify the industry category for a specific employer to find out more about what they do and what kind of workers they employ.***My Next Move*****Web Address:** www.MyNextMove.gov**Description:** An easy to navigate, easy to understand career exploration tool based on O*NET occupational competency profiles.***O*NET OnLine*****Web Address:** www.onetonline.org**Description:** A career exploration tool that offers a variety of search options to find detailed information on occupational competencies including tasks, knowledge, skills, abilities, tools and technology, and other characteristics, with links to employment and wage data.***mySkills myFuture*****Web Address:** www.mySkillsmyFuture.org**Description:** A transferable skills tool for dislocated workers to help them: 1) identify other occupations where they can apply their skills, 2) identify potential skill gaps and relevant training from their current skill set and a new occupation, and 3) identify local job openings in the new career field.***LinkedIn: Aerospace Transition Group*****Web Address:** www.linkedin.com/groups?mostPopular=&qid=3175557**Description:** Workforce Solutions is effectively using LinkedIn to connect with the Aerospace industry.***First Coast Virtual Job Fair*****Web Address:** www.firstcoastvirtualjobfair.org/default.cfm**Description:** WorkSource utilizes a virtual job fair for real-time employer and jobseeker matching.***Constant Contact*****Web Address:** www.constantcontact.com**Description:** WorkSource utilizes constant contact to communicate information regarding job openings.***IdeaScale*****Web Address:** bsrtraining.ideascale.com/**Description:** This is a brainstorming tool that participants will use to share and rank ideas regarding how to innovate business services.**Channeling Good Ideas Into Jobs**

Directory of Learning Tools 2011**Web Address:** www.c4lpt.co.uk/Directory/index.html**Description:** This website, published by the British Centre for Learning and Performance Technologies, is a great directory of online tools that lists them by category, and explains what each category of tools is for. If you click on a category [*demonstrate*] it provides a brief description of each tool, lists which ones are free, and which ones are popular or award-winning.***Examples of Corporate Social Media in Action*****Web Address:** mashable.com/2008/07/23/corporate-social-media/**Description:** Lists more than 35 companies who are experimenting with social media in a host of different ways.

Example: Menu of Business (Employer) Services

Houston, Texas-based Workforce Solutions uses the term Employer Services to describe the workforce development services it provides to employers. BSRs (or ESRs) in Houston are trained and equipped to provide the following menu of services to employers of all sizes, including small businesses.

Go through this list with your Business (or Employer) Services Reps. Do they offer similar services? How can they tailor or package them to help entrepreneurs facing their first hires, and small businesses ready for their first expansion?

Working cooperatively with Career Center staff and following through to ensure customer satisfaction, Workforce Solutions’ Employer Services Division provides these services to employers:

- ☐ Finding solutions for the human resource needs of our business customers.

What we do:	How this can be focused for small businesses:

- ☐ Finding qualified candidates to fill job openings, including posting job orders in WorkInTexs.com and referring qualified applicants for those openings.

What we do:	How this can be focused for small businesses:

(cont’d.)

- ☐ Human resources on a variety of topics, including but not limited to:
 - Hiring, firing and employee discipline
 - Basic Americans with Disability Act compliance
 - Equal opportunity requirements
 - Salaries and benefits
 - Job task analysis and job redesign
 - Downsizing and upsizing

What we do:	How this can be focused for small businesses:

- ☐ Skill training for current and new workers. This includes administering Workforce Solutions' financial aid for employers and employer groups to assist in training, upgrading and retraining new and current workers.

What we do:	How this can be focused for small businesses:

- ☐ A variety of labor market information, including on wages, hiring trends and industry skill needs

What we do:	How this can be focused for small businesses:

Policy Matters

How Does Entrepreneurship Fit Into Workforce Development?

The legal authority for workforce investment in entrepreneurship begins in the Workforce Investment Act of 1998 (WIA) which authorizes the provision of entrepreneurial training to adult and dislocated workers, and authorizes entrepreneurial work experiences for youth.¹⁵

Late in 2010, the U.S. Department of Labor Employment and Training Administration published Training and Guidance Letter (TEGL) #12-10, “To encourage states to establish parameters for funding entrepreneurial and self-employment training under Title I of the Workforce Investment Act of 1998 (WIA), which authorizes the provision of entrepreneurial training to adult and dislocated workers, and authorizes entrepreneurial work experiences for youth.”¹⁶

Here are four key reasons why the public workforce system should support entrepreneurship under WIA:

- Can provide avenues to self sufficiency and income for unemployed, especially in tough economic times.
- May offer individuals with disabilities greater workplace flexibility and income opportunities.
- May allow individuals in rural areas to work locally, even at home, to contribute to economic recovery and growth.
- Youth may benefit from the leadership and financial management skills provided by entrepreneurship work experience, particularly in a tight labor market where traditional jobs for youth are scarce.

Several TEGLs from 2006 onward have encouraged the public workforce system to provide entrepreneurship training opportunities.¹⁷ Yet data gathered under WIA from 2005-2008 showed only a relatively small number of individuals – primarily dislocated workers – actually receive such services each year. There’s reason to be optimistic, however, as this appears to be changing in more recent years as economists focus on small business as an economic driver.

For more information on the cited ETA policies, please see:

- [Supporting Entrepreneurship and Self Employment Through the Public Workforce System](http://www.workforce3one.org/view/5001031443928149766/info) (www.workforce3one.org/view/5001031443928149766/info) - Entrepreneurship is an important alternative to traditional reemployment for America’s unemployed. During Global Entrepreneurship

¹⁵Workforce Investment Act of 1998, Section 134(d)(4)(D)(vi) and 20 CFR 664.460, WIA Final Rules.

¹⁶ wdr.doleta.gov/directives/attach/TEGL/TEGL12-10acc.pdf

¹⁷ Training and Employment Guidance Letter (TEGL) 16-04, “Self-Employment Training for Workforce Investment Clients” and TEGL 16-05, “Flexibility Under Current Employment and Training Law for Hurricane Recovery Strategies.”

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Week, November 15 - 19, 2010, ETA issued guidance on the role of the workforce system in supporting entrepreneurship. Includes:

- Recorded webinar presentation
- Slides
- Transcript
- TEGL 12-10 (pdf)

Employment and Training Administration (ETA) Resources

The Employment and Training Administration has created a myriad of online resources related to entrepreneurship services in the workforce system. The following links and pages highlight promising practices in specific States and in target population programs, such as services for people with disabilities. You are encouraged to borrow widely from these resources in developing your own Small Business Partnership:

- **Entrepreneurship Competency Model**
<http://www.careeronestop.org/competencymodel/pyramid.aspx?ENTRE=Y>
- **ETA Occasional Paper 2009-22, “Think Entrepreneurs: A Call to Action.”**
http://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=2847
- **Project GATE I Final Report**
http://wdr.doleta.gov/research/FullText_Documents/Findings%20from%20the%20Evaluation%20of%20Project%20GATE%20Report%2Epdf
- **The Road to Self-Sufficiency: A Guide to Entrepreneurship for Youth with Disabilities**
<http://www.ncwd-youth.info/road-to-self-sufficiency>
- **Self-Employment Technical Assistance, Resources, & Training (START-UP / USA).**
<http://www.start-up-usa.biz/>

Project GATE

Over the years several demonstration grants have sought to define the most workable connection between workforce development and entrepreneurship as envisioned by WIA. The most successful of these to date has been Project GATE (*Growing America Through Entrepreneurship*).

During difficult economic times, the opportunity cost for engaging in self-employment training is significantly decreased. Since employment opportunities are scarce, the individual can dedicate more time to starting their business. In this case, self employment training is a win-win proposition because it promotes both workforce development for the unemployed individual and economic development for the local economy.

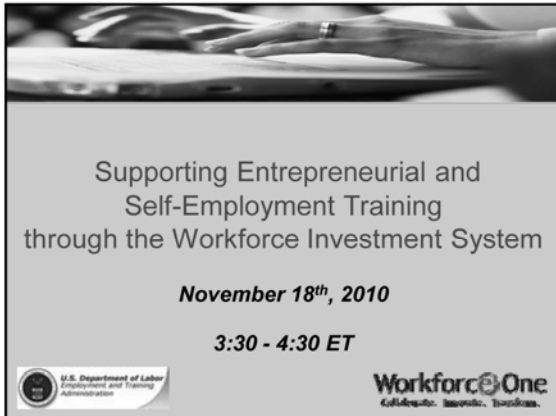
Growing America Through Entrepreneurship: Final Evaluation of Project GATE, December 2009

The evaluation, published in December 2009, concluded that "...a GATE-like program may be especially effective in recessionary periods when few wage and salary jobs are available. During difficult economic times, the opportunity cost for engaging in self-employment training is significantly decreased. Since employment opportunities are scarce, the individual can dedicate more time to starting their business. In this case, self employment training is a win-win proposition because it promotes both workforce development for the unemployed individual and economic development for the local economy. A program of this nature should be acted on soon rather than waiting for the next recession as by then it may be too late to gather support for enacting a new program."¹⁸

A key feature of the GATE program is the participating states' willingness to provide UI waivers for enrolled participants who are making demonstrable headway toward starting their own business. It's important to note that this benefit is not available in all communities; however, successful Small Business Partnerships have found creative means to work around the challenges of training employed and/or job-seeking participants. For example, participants could choose entrepreneurship classes held during the day or during the evening at community-based and faith-based organizations selected for their proximity to the targeted population.

¹⁸ Growing American Through Entrepreneurship: Final Evaluation of Project GATE, December 2009

ETA presented a webinar, ***Supporting Entrepreneurial and Self-Employment Training through the Workforce Investment System***, in November 2010 in relation to TEGL 12-10.



Supporting Entrepreneurial and Self-Employment Training through the Workforce Investment System

November 18th, 2010

3:30 - 4:30 ET

U.S. Department of Labor
Employment and Training Administration

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Moderator

Gina Wells
Policy Analyst
Office of Workforce Investment
Employment and Training Administration
U.S. Department of Labor

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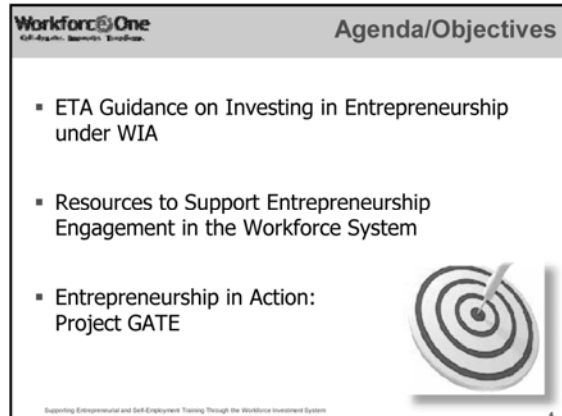
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Featured Speakers

Presenters

- **Gina King Wells**, Policy Analyst, Office of Workforce Investment, , Employment and Training Administration
- **Myra Beatty**, Workforce Administrator, North Carolina Department of Commerce
- **Barry W. Ryan**, Assistant Director, Institute for Rural Entrepreneurship, N.C. Rural Economic Development Center
- **Katie Gailles**, GATE Counselor, Institute for Rural Entrepreneurship, N.C. Rural Economic Development Center


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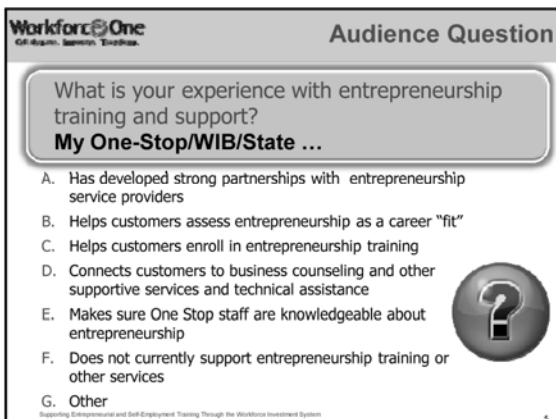
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Agenda/Objectives

- ETA Guidance on Investing in Entrepreneurship under WIA
- Resources to Support Entrepreneurship Engagement in the Workforce System
- Entrepreneurship in Action: Project GATE



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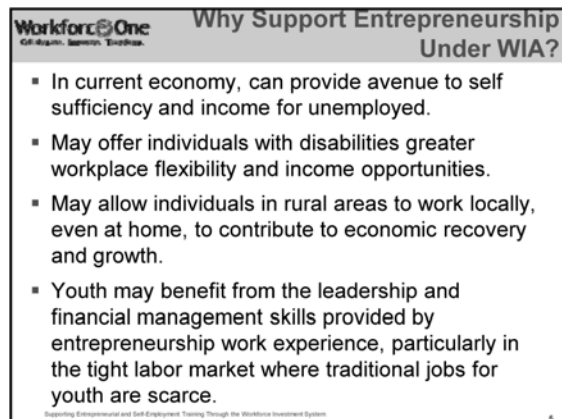
Audience Question

What is your experience with entrepreneurship training and support?
My One-Stop/WIB/State ...

- A. Has developed strong partnerships with entrepreneurship service providers
- B. Helps customers assess entrepreneurship as a career "fit"
- C. Helps customers enroll in entrepreneurship training
- D. Connects customers to business counseling and other supportive services and technical assistance
- E. Makes sure One Stop staff are knowledgeable about entrepreneurship
- F. Does not currently support entrepreneurship training or other services
- G. Other



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Why Support Entrepreneurship Under WIA?

- In current economy, can provide avenue to self sufficiency and income for unemployed.
- May offer individuals with disabilities greater workplace flexibility and income opportunities.
- May allow individuals in rural areas to work locally, even at home, to contribute to economic recovery and growth.
- Youth may benefit from the leadership and financial management skills provided by entrepreneurship work experience, particularly in the tight labor market where traditional jobs for youth are scarce.

Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Channeling Good Ideas Into Jobs

Workforce Partnerships that Support Entrepreneurs and Small Businesses

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Legal Authority

- Included as allowable training for Adults and Dislocated Workers at WIA Section 134(d)(4)(D)(vi).
- Self-employment training programs and providers of these programs can and should be included on the statewide and locally maintained eligible training provider lists.
- Allowable youth activity under the “work experience” program element
- Allowable training for in Migrant and Seasonal Farm Worker and Indian and Native American grantees.

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Roles for Workforce System in Supporting Entrepreneurship

- Engage with local, regional, and state partners to develop an entrepreneurial environment
- Inform One-Stop customers about opportunities for self-employment and entrepreneurship
- Connect One-Stop customers to entrepreneurship resources like counseling and training
- Partner with organizations that support entrepreneurship and co-locate small business development resources within One-Stop Career Centers as partners

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Roles for Workforce System in Supporting Entrepreneurship

- Add entrepreneurship training programs to the eligible training provider list
- Use Individual Training Accounts to fund entrepreneurship training
- Integrate entrepreneurship strategies into overall youth education and development activities
- Develop strategies to help small business owners to grow their businesses.

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Federal Resources to Support Entrepreneurship

- Small Business Administration
- Department of Labor
- Department of Commerce
- Social Security Administration
- Department of Education
- Department of Veterans Affairs

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Spotlight on Small Business Administration Resources

- Small Business Development Centers.
- SCORE, Counselors to America’s Small Business.
- Women’s Business Centers.
- Veterans Business Outreach Program.
- Financing
<http://www.sba.gov/financialassistance/borrowers/role/index.html>.

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Critical Elements for WIA-funded Entrepreneurship Activities

- Broad Partnerships
- Assessment
- Appropriate and Effective Training
- Ongoing Support and Technical Assistance
- Knowledgeable Staff

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Channeling Good Ideas Into Jobs

Workforce Partnerships that Support Entrepreneurs and Small Businesses

Workforce@One Of Advisors, Supporters, Trainers **Performance Accountability**

- Use supplemental data for *entered employment, retention, and youth placement* measures.
- *Average earnings* not accurately reflected by UI wage records for the self-employed - can use this as a legitimate factor in negotiating performance targets for *Average Earnings*.
- Can work with partners like SBDCs to ID additional metrics that demonstrate the impact of entrepreneurship training and other services.

Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Workforce@One Of Advisors, Supporters, Trainers **Allowable Costs**

- Entrepreneurial Training
- Skills Training
- Recruitment and Hiring
- Credentials
- A portion of Equipment, Software, and Computer Costs
- **Business capitalization costs or other economic development activities not directly tied to training are not allowable.**

Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Workforce@One Of Advisors, Supporters, Trainers **Resources**

- **Entrepreneurship Competency Model**
<http://www.careeronestop.org/competencymodel/pyramid.aspx?ENTRE=Y>
- **ETA Occasional Paper 2009-22, "Think Entrepreneurs: A Call to Action."** http://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=2847
- **Project GATE I Final Report**
http://wdr.doleta.gov/research/FullText_Documents/Findings%20from%20the%20Evaluation%20of%20Project%20GATE%20Report%20.pdf
- **The Road to Self-Sufficiency: A Guide to Entrepreneurship for Youth with Disabilities**
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Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Workforce@One Of Advisors, Supporters, Trainers **Presenters**

Myra Beatty
Workforce Administrator
North Carolina Department of Commerce

Barry W. Ryan
Assistant Director
Institute for Rural Entrepreneurship
N.C. Rural Economic Development Center

Katie Gailes
GATE Counselor
Institute for Rural Entrepreneurship
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Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Workforce@One Of Advisors, Supporters, Trainers **Growing America Through Entrepreneurship**

Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Workforce@One Of Advisors, Supporters, Trainers **Growing America Through Entrepreneurship**

Demonstration project funded by
Employment and Training Administration

<p>Project GATE 1 2003-2006</p> <ul style="list-style-type: none"> ▪ Pennsylvania ▪ Minnesota ▪ Maine 	<p>Project GATE 2 2008-2011</p> <ul style="list-style-type: none"> • Alabama • Minnesota • North Carolina • Virginia
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Supporting Entrepreneurial and Self-Employment Training Through the Workforce Investment System

Channeling Good Ideas Into Jobs

**Workforce Partnerships that Support
Entrepreneurs and Small Businesses**

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NC GATE Implementation Plan


- 8 GATE sites at Community Colleges
- Virtual site at Rural Center
- Strong partnerships with local and state workforce partners
- Serve 720+ GATE clients in 3 years
- Create businesses & jobs!

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NC GATE Eligibility



- WIA-eligible dislocated worker (does not need to be WIA enrolled)
- 18+ and eligible to work in U.S.
- Have a legal business idea
- Live in a rural county, or:
 - 1) Laid off from a rural job
 - 2) Plan to start a rural business


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Service for Dislocated Workers

- Assessment of entrepreneurial skills
- Entrepreneurship training and coaching
- Qualification for Commission Approved Training and UI Job-Search Waiver
- Access to microenterprise loans



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Early Success for NC GATE

Since April 15, 2009:

- 720 Scholarships awarded
- Clients in 64 N.C. counties
- Over 70 businesses started
- 150+ jobs created
- Microenterprise loans:
 - 22 applications
 - 3 pending
 - 5 funded totaling \$10,750

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GATE Approach

- Case Management
- Intensive coaching
- Tailored training

Key Topics:

- Personal finances
- Skills and goals
- Find resources



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GATE Success Story





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Channeling Good Ideas Into Jobs

Workforce Partnerships that Support Entrepreneurs and Small Businesses

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GATE Success Story




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Contact Us



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