



INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT

SERVING AS AN EFFECTIVE INTERMEDIARY

2017 Indiana Sectors Summit Breakout Session
November 14, 2017



JOBS FOR THE FUTURE

INDIANA SECTOR PARTNERSHIPS



Veronica Buckwalter, Senior Program Manager,
Jobs for the Future

Judy Hasselkus, Program Director for Employer
Engagement and Sector Specialist for Health Care,
Agriculture, and Life Sciences, IDWD

Shannon Doody, Director of Education Workforce
Partnerships, Center of Excellence in Leadership of
Learning

OVERVIEW OF PRESENTATION



Key Roles and Functions of the Intermediary

Key Capabilities, Knowledge, and Experience of Effective Intermediaries

Addressing Gaps to Identify/Become a Strong Intermediary

Toolkits, Templates, and Resources to Help Guide Intermediaries



INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT

KEY ROLES AND FUNCTIONS OF THE INTERMEDIARY



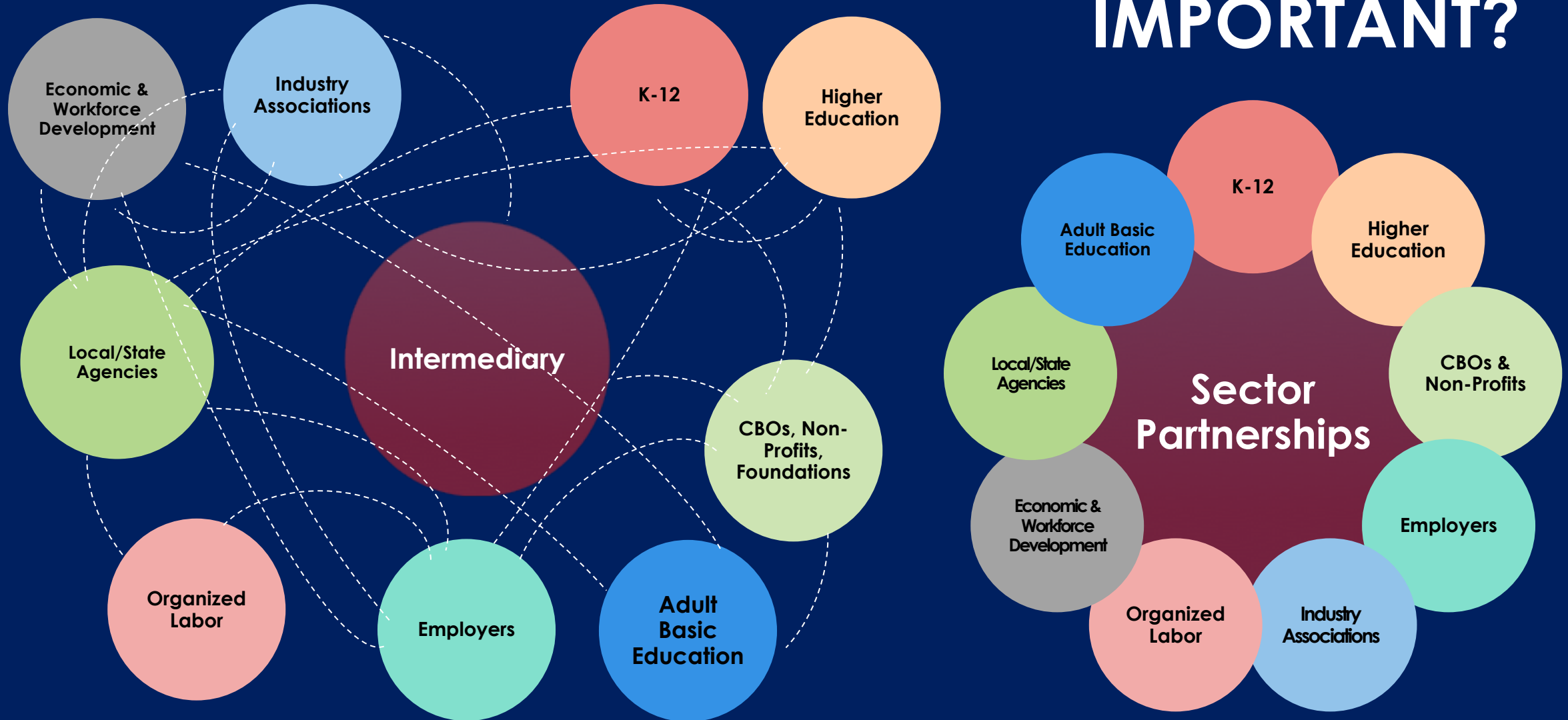
JOBS FOR THE FUTURE

INDIANA SECTOR PARTNERSHIPS

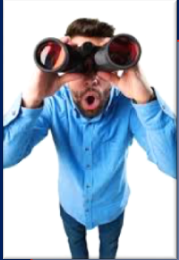
FISCAL INTERMEDIARY VS. INTERMEDIARY

- Fiscal Intermediaries (aka fiscal agent, fiscal employer, fiscal support entity, financial management service, fiscal sponsor)
 - Often the direct grantee/recipient of funds
 - Responsible for tracking, monitoring budget expenditures, invoicing, and identifying potential over- and under-spending
 - Assures adherence to federal and state laws and regulations
 - Ensures compliance with documentation requirements related to management of public funds
- Intermediaries (aka backbone organizations, conveners, organizers, mobilizers)
 - May or may not be a partnership's fiscal intermediary (one way is not better than the other)

WHY IS AN INTERMEDIARY IMPORTANT?



KEY ROLES AND FUNCTIONS



Guide Vision and Strategy



Support and Align Activities



Establish Shared Measurement Practices



Build Public Awareness and Will



Advance Policy



Mobilize Resources

GUIDING VISION AND STRATEGY

The status quo



Short-term versus long-term



Lack of awareness of the issues



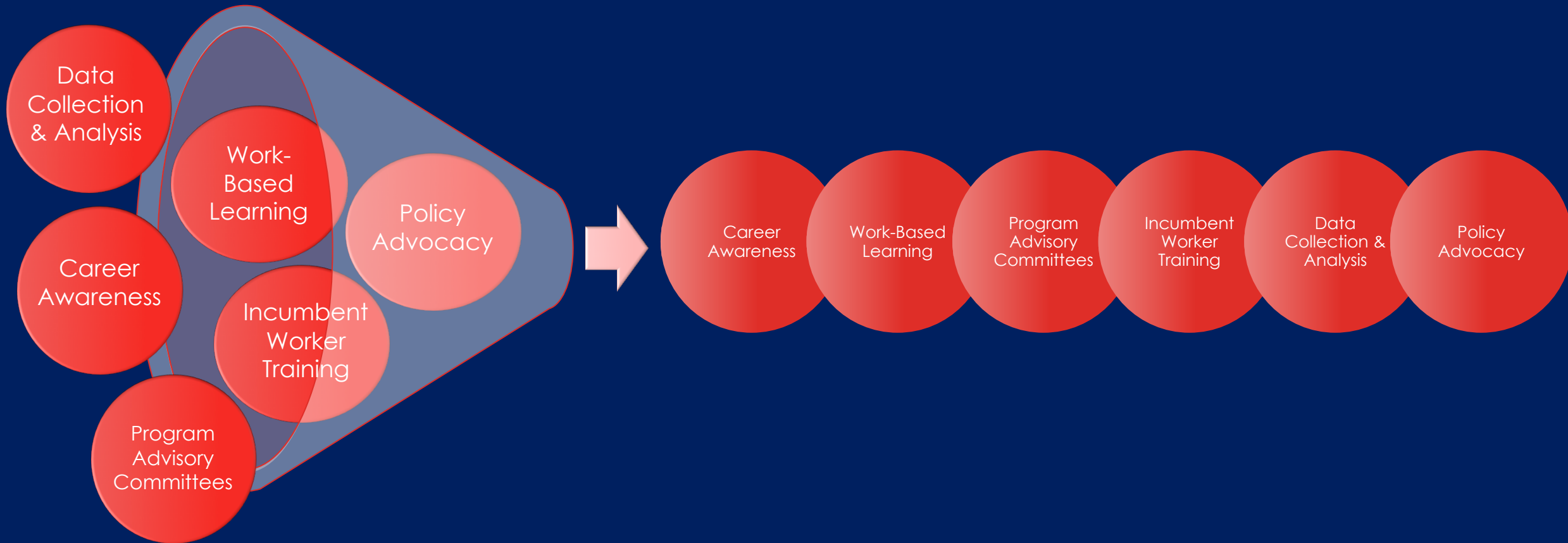
Mistrust and competition



Different agendas & priorities



SUPPORT AND ALIGN ACTIVITIES



ESTABLISH SHARED MEASUREMENT PRACTICES



How do we engage, partner, and collaborate to effectively and legally gather the data we need?

What other partners, resources, policies or systems are needed in order to measure and assess impact?

What must be measured that we are currently not measuring and are we able to start measuring it? What are the barriers?

What are stakeholders currently measuring and how are they measuring it?

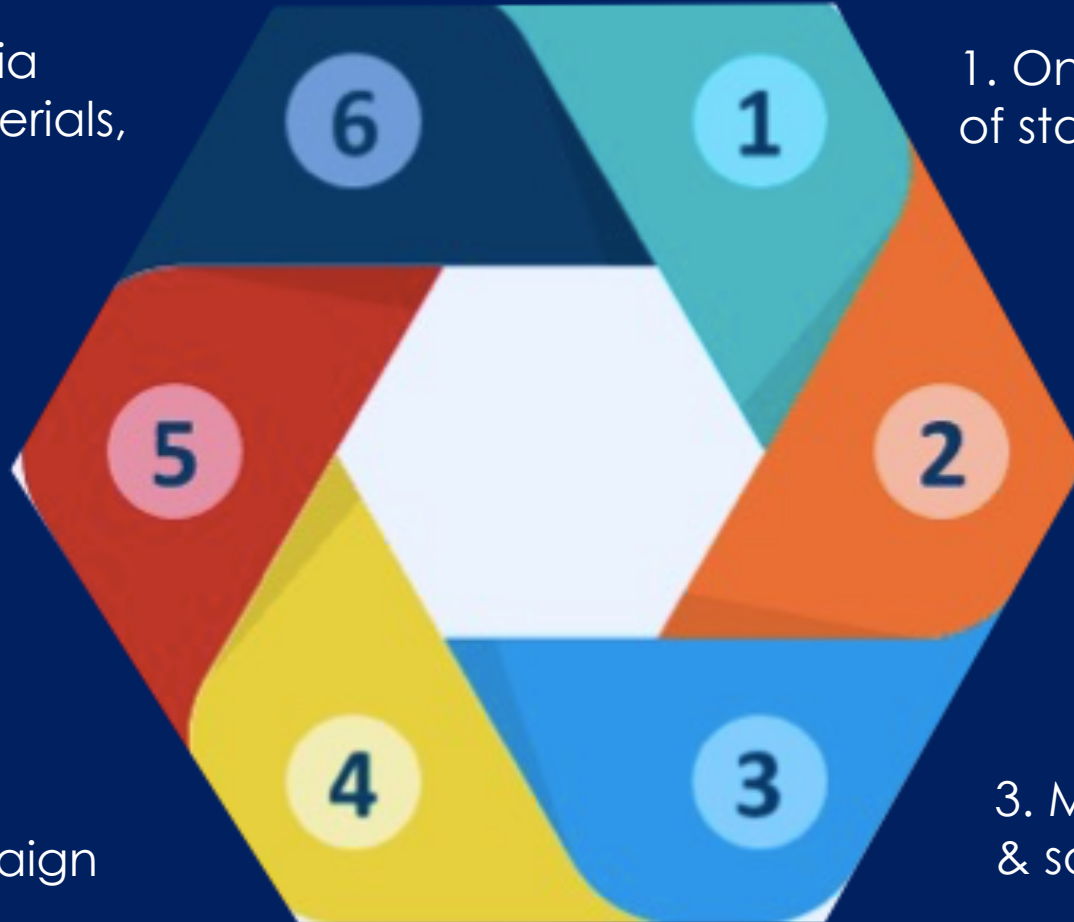
What can be and should be measured to demonstrate impact and success?

BUILD PUBLIC AWARENESS AND WILL

6. Management of media requests, marketing materials, public appearances

5. Enabling stakeholder ownership and buy-in

4. Development of branding/logo campaign



1. Onboarding/Recruitment of stakeholders

2. Gathering success stories and testimonials

3. Management of website & social media presence

POLICY ADVOCACY



**Roles of the
intermediary**

MOBILIZE RESOURCES

What does it mean to “mobilize” resources?

What it DOES mean

- Identifying potential sources of funding
- Gathering necessary data and information to submit for funding
- Identifying creative ways of raising funds and securing new partners
- Engaging necessary partners and funders
- Evaluating the effectiveness and efficiency of staff, projects, initiatives supported by funds
- Identifying ways that funding can support/align to programmatic activities
- Identifying opportunities to blend or braid funding streams

What it does NOT mean

- Responsible for securing all needed financial and non-financial support
- Responsible for coordinating, responding to, and applying for all funding opportunities
- Taking full responsibility for the sustainability and continued operation of the partnership



INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT

KEY CAPABILITIES, KNOWLEDGE, AND EXPERIENCE OF EFFECTIVE INTERMEDIARIES



CAPABILITIES

Staff Capacity

Dedicated staff and resources focused on partnership development, supporting the activities of the partnership, and measuring success

Engage Regional Stakeholders

Confident approaching potential partners and conveying partnership benefits in order to recruit new stakeholders

Maintain Objectivity

Ability to listen to and process ideas and suggestions taking into account all perspectives and ensure all voices are heard while maintaining neutrality

See the Long-Term, Big Picture

Recognize the importance of maintaining momentum and securing quick wins while keeping in mind the long-term goals and objectives of the initiative

Network & Build Awareness

Well-established and recognized throughout the region as a trusted and reputable organization capable of building public support and buy-in

KNOWLEDGE

Industry Dynamics

Key industry leaders, workforce challenges, and policies and regulations impacting workforce

Workforce Development Strategies

Proven models, strategies and best practices such as career pathways, industry-recognized and stackable credentials, work-based learning, career awareness, and incumbent worker training

Economic Drivers and Challenges

Key factors that significantly impact the economic well-being of the region and the challenges that are currently influencing those factors

Marketing and Communication Strategies

Effective strategies for communicating the partnerships missions, objectives, and success to the community and regional stakeholders

Fiscal Compliance and Management

Understanding of key fiscal management practices to ensure compliance and adherence to state and federal regulations

EXPERIENCE

Organizing
Stakeholders across
Multiple
Committees

Managing the agendas, objectives, activities and achievements of multiple committees and subcommittees

Identifying &
Recruiting Partners

Seeking out new potential stakeholders that can impact the success of partnership activities and grow capacity

Developing a
Common Agenda
and Goals

Aligning the agendas and priorities of diverse stakeholders to identify common threads and shared goals among the entire group

Managing
Meetings & Events

Scheduling, planning and executing effective meetings for high-level executives to include meeting logistics, materials, staffing, and follow-up

Fundraising, Grant
Writing, Resource
Development

Identifying and securing funding from a variety of sources utilizing a variety of innovative strategies. Thinking creatively about resource allocation



INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT



JOBS FOR THE FUTURE

ADDRESSING THE GAPS



Ms. Shannon Doody

Director of Education Workforce
Partnerships, Center of Excellence
in Leadership of Learning (CELL)

What strategies do you suggest for organizations seeking to serve as intermediaries that may not have all of these key capabilities, knowledge, and experience?

What advice do you have for collaboratives looking for a strong convener/backbone, but are having difficulty finding an organization that has the required skills, experience, and knowledge?



INNOVATION NETWORKS





INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT

Q&A





INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT

TOOLS, TEMPLATES, AND RESOURCES TO GUIDE INTERMEDIARIES



NEXT GENERATION SECTOR PARTNERSHIP TRAINING MANUAL

<http://www.nextgensectorpartnerships.com/>

Developed by JP MorganChase, the State of California, and the Colorado Workforce Development Council

All resources are free of charge.

Resources include:

- Community of Practice
- Comprehensive toolkit
- Samples, templates, worksheets
- Successful strategies/models
- Videos of actual partnership meetings



COLLECTIVE IMPACT FORUM

www.collectiveimpactforum.org

- Developed by FSG and The Aspen Institute
- Free of charge, but registration required
- Aimed at collective impact initiatives, but can be adapted for sector partnership activities

Resources:

- Training manuals and toolkits
- Templates, worksheets, sample job descriptions
- Free webinars and technical assistance events
- Inventory of Initiatives and Success Stories
- Communities of Practice for backbones and funders



COMMUNITY TOOL BOX

<http://ctb.ku.edu/en>

- Developed by the University of Kansas
- Free of charge, but registration required
- Aimed at collective impact initiatives, but can be adapted for sector partnership activities



Numerous toolkits specific to:

- Creating and Maintaining Partnerships
- Assessing Needs and Resources
- Analyzing Problems and Goals
- Developing Strategic and Action Plans
- Influencing Policy Development
- Evaluating the Initiative
- Writing Grant Applications for Funding
- Sustaining the Work and Initiatives



INDIANA
DEPARTMENT OF
WORKFORCE
DEVELOPMENT

THANK YOU!

***PLEASE REMEMBER TO COMPLETE THE SUMMIT
EVALUATION IN YOUR FOLDERS AND RETURN
AT THE REGISTRATION DESK***



JOBS FOR THE FUTURE