

SELF ASSESSMENT: ENGAGING WORKPLACE PARTNERS



NAME: _____

ORGANIZATION: _____

Workplace Partners as Customer <i>Effective organizations define and prioritize employers and other potential workplace partners (including labor organizations, government, and community groups) as their primary customers. Resources, staffing, and organizational decisions reflect that priority.</i>	
Effectiveness Indicators	Status
▪ Engaging workplace partners is a clear and stated priority in the organization.	! ? ✓ ○
▪ The local labor market is researched on a regular basis, and target markets for engagement are set.	! ? ✓ ○
▪ All staff are aware of and utilize local labor market trends and forecasts to guide their work.	! ? ✓ ○
▪ The benefits to employers and other workplace partners are defined and are reflected in outreach materials and strategies.	! ? ✓ ○
▪ Materials specifically targeted to employers and other workplace partners have been created and are readily available to all staff.	! ? ✓ ○
▪ A sequenced range of participation options has been defined for workplace partner involvement.	! ? ✓ ○
▪ All employer and workplace partner commitments are equally valued by staff and the organization.	! ? ✓ ○

KEY: ! = Have practices to share with others ? = Need help from others ✓ = Active work underway ○ = Not working on this right now

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Sales and Customer Service Oriented <i>Effective organizations have a culture that reflects a sales and customer service orientation. All staff and organizational services serve as evidence of this culture.</i>	
Effectiveness Indicators	Progress
<ul style="list-style-type: none"> • A full range of services are offered, targeted to meet employer and partner identified needs. 	! ? ✓ ○
<ul style="list-style-type: none"> • The organization’s offices are professional and reflect a business-oriented environment. 	! ? ✓ ○
<ul style="list-style-type: none"> ▪ All staff understand their role in delivering high quality customer service to all prospective customers. 	! ? ✓ ○
<ul style="list-style-type: none"> ▪ Ongoing support is provided for workplace partners and worksite supervisors. 	! ? ✓ ○
<ul style="list-style-type: none"> ▪ Staff are comfortable with and skilled in their role as salespersons. 	! ? ✓ ○
<ul style="list-style-type: none"> • All work reflects a customer service and sales culture. 	! ? ✓ ○
<ul style="list-style-type: none"> ▪ Staff seek to solve problems and provide resources for customers outside the scope of their organization’s ability to respond. 	! ? ✓ ○

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Targeted Resources <i>Effective organizations develop and target resources, both human and capital, to support their engagement efforts. Budgets and staff support a range of marketing, service, support, and evaluation activities.</i>	
Effectiveness Indicators	Progress
<ul style="list-style-type: none"> Staff are identified and dedicated to the engagement effort. Appropriate staff time is allocated to activities. 	! ? ✓ ○
<ul style="list-style-type: none"> Staff are skilled in marketing, sales, and customer service, have experience in a range of workplaces and are conversant in local economic development and business practices. 	! ? ✓ ○
<ul style="list-style-type: none"> The organization's budget clearly supports marketing, services, support, and evaluation. 	! ? ✓ ○
<ul style="list-style-type: none"> New programs and activities have programmatic and budgetary connections to the engagement effort. 	! ? ✓ ○
<ul style="list-style-type: none"> A formal advisory group of business and workplace partner leadership guides the engagement effort. 	! ? ✓ ○
<ul style="list-style-type: none"> The organization conducts staff development activities related to workplace partner engagement on a regular basis. 	! ? ✓ ○

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System Approach <i>Effective organizations embrace a systems approach through their work, applying clear and detailed plans and utilizing appropriate technologies. They work closely with others seeking to connect with and engage a range of community and workplace partners and are formally connected to a larger, broader system.</i>	
Effectiveness Indicators	Progress
<ul style="list-style-type: none"> • A clear and detailed marketing plan guides the engagement effort and is consistent with the organization’s strategic plan. 	! ? ✓ ○
<ul style="list-style-type: none"> • The marketing plan reflects market research, industry, and local labor market trends, and the appropriate sequencing of a full range of continuous marketing and awareness efforts. 	! ? ✓ ○
<ul style="list-style-type: none"> • The marketing plan identifies targeted partners, includes specific strategies, key activities, measurable goals, and a calendar of activity. 	! ? ✓ ○
<ul style="list-style-type: none"> • The organization and engagement staff use a common contact management system. 	! ? ✓ ○
<ul style="list-style-type: none"> • Effective communication tools and methodologies are in place. 	! ? ✓ ○
<ul style="list-style-type: none"> • The organization and engagement team work closely with others seeking to engage employers and other workplace partners, and have developed and applied strategies to share and leverage efforts in the community. 	! ? ✓ ○
<ul style="list-style-type: none"> • Work is aligned with local economic development organizations, industry associations, and labor organizations. 	! ? ✓ ○
<ul style="list-style-type: none"> • The organization and engagement staff are formally connected to a broader system. 	! ? ✓ ○

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Quality Practices <i>Effective organizations apply continuous improvement practices to gauge the effectiveness of their efforts and guide their work. They are focused on quality and use a variety of measures to evaluate and improve their practice.</i>	
Effectiveness Indicators	Progress
<ul style="list-style-type: none"> • The organization has set clear and quantifiable goals for employer and workplace partner engagement. 	! ? ✓ ○
<ul style="list-style-type: none"> • Staff performance is measured against quantifiable goals. 	! ? ✓ ○
<ul style="list-style-type: none"> ▪ The organization measures success against a clear set of goals and objectives. 	! ? ✓ ○
<ul style="list-style-type: none"> • The organization holds regular program/activity reviews with their workplace partners. 	! ? ✓ ○
<ul style="list-style-type: none"> • Results are communicated and celebrated with organizational staff, partners, leadership, and the community. 	! ? ✓ ○
<ul style="list-style-type: none"> • Customer satisfaction surveys and focus groups are conducted regularly. 	! ? ✓ ○
<ul style="list-style-type: none"> • Internal assessments of organizational capacity, resource alignment, and staff experience and skills are conducted. 	! ? ✓ ○
<ul style="list-style-type: none"> • The organization uses data and evaluation results to adjust program strategies. 	! ? ✓ ○