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Beyond The First Meeting

A Guide for Beginning and Cultivating a Thriving Workplace Education Program

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I. What Is the Guide?

This guide will help adult education providers connect with employers to build strong, viable partnerships. It's designed from the perspective that the best way to address the needs of students is by adequately building and fostering strong employer partnerships. Once this is done, you are well on the way to meeting the employment or advancement needs of students.

The goal of this guide is to help you get your first meeting with an employer. Making it through that meeting with success while landing the second invite from the employer is your goal!

This guide provides proven strategies and common pitfalls educators sometimes experience when building relationships with employers.

By following this guide, adult education providers can expect to better engage employers, speak their language, and obtain outcomes!

This guide is designed to be convenient. We recommend a complete skim through the book to get a sense of the philosophy and of how the material is organized. A quick glance at the table of contents will provide you with a sense of the layout.

Who is this written for?

Chances are if you are reading this, you are already in the process of developing or implementing an initiative that is partnering with employers. You may already have some experience with employers and want to get better. You might even consider yourself a pro. The guide is designed to offer something for everyone working with employers, no matter your expertise.

Who are the authors?

This guide was inspired by a document written over 20 years ago by Eleni Papadakis, David Tobin, and Sonny Schwarz. That document, the Business Impact Primer, inspired me, Anson Green, early in my career when I began developing adult education and training services for business while working for the state of Texas. I've had it with me ever since. It was small enough to fit in a pocket and packed full of great insights and approaches.

I was able to get in touch with Ms. Papadakis who was happy to see me use it as a jumping off place for this guide, and I scanned it into editable text (I had just had a hardcopy!).

The durability of this document after all those years definitely proves that some approaches are timeless, and, while the business world has been transformed during that period, the needs and demands of businesses for an educated workforce remain essentially the same. In addition to the original authors, Karyn Goven provided an initial review and content. We all hope you find it useful.

II. Getting Started

What are the benefits of working with employers?

Chances are you entered adult education because you were interested in supporting adults in meeting their economic, family, or community goals. Often, these objectives are tied to having a job and a job that pays well or to moving from having multiple low-paying jobs to just one that will provide a career path.

A well-designed adult education program with a strong employer focus will support you in better meeting these objectives. Here's how:

- **Employers** are more likely to hire/retain/promote participants who complete programs designed to meet their stated needs.
- **Workforce board partners** consistently need services that upskill job seekers who are lower skilled or have limited English.
- **Community college training programs** require students to have an established level of basic skills to enter. If students need to develop reading, writing, math, or English skills, they often are referred to tuition-based college developmental education programs that are typically focused on academic remediation and not on workforce-focused basic skills.

Understanding each of these perspectives is important. Additionally, the synchronization of these unique partners will garner the most successful results in both meeting the needs of local employers while enhancing job opportunities for unemployed and underemployed individuals.

Bottom-line benefits employers are looking for

You may have your hat as an adult educator focused on reading, writing, math, English, and training skills firmly on your head, but for employers, the expertise of adult educators can offer much more academic and training development.

Employers often know the least about their lowest skilled workers who are usually the largest segment of their workforce: frontline workers. They are unsure how best to teach and train these valued workers. If those workers are immigrants or refugees, employers are often very unfamiliar with the specific needs and trends within those communities.

These are two areas where you're an expert, because the needs the prospective employer may be weak on are the same areas you address in the classes you provide to the community.

Well begun is half done

This proven adage is so true when you are working with employers. If you start off well and have done your homework, you are halfway there. If not, you probably won't get to that second meeting with the business.

Adult educators and workforce development professionals can effectively engage employers when employers' needs are well understood and incorporated into all stages of program design, delivery, evaluation, and performance management.

Before you can get there though, you must be able to effectively engage employers with services that speak to their workforce, business pressures, and future needs. The challenge is that they may not fully understand those needs, especially for their frontline or entry-level workers.

III. The Employer's Perspective

Businesses are experts at their business, whether it is providing a service or making a product. They are often not experts at addressing the education and training needs of job seekers or workers with emerging skills or limited English—that's where you come in!

What outcomes and benefits are employers looking for?

It's not always about the bottom line, but it might be.

Of course, you won't fully know this until you ask the employer and listen well to their response.

Chances are that employers are looking to address issues that are related to pressures that make it hard to run their business. Often these pressures are impacting profits—their bottom line—but sometimes employers want to offer adult education services for reasons that don't directly appear to impact the profits.

Understanding what is driving their pressures is critical to developing a successful program. Let's start with understanding the bottom line.

Here are common bottom-line benefits employers seek:

- **Retaining workers—** Worker turnover is costly and is typically higher for frontline and entry-level workers. Targeted adult education services can reduce job attrition and help businesses retain and grow workers.
- **Finding or developing skilled talent—** Employers are always looking for talent, especially with advances in technology and automation in the workplace. Developing talent from existing workers or finding hidden talent, such as skilled immigrants, can help alleviate the pressure of finding external and untested talent. These employees already know the company, the company culture, and the processes. In addition, these workers are proven and trusted.

- **Increasing safety/reducing accident reportables—** Accidents are costly for everyone and can very negatively impact the reputation of the company in the community. Effective training of frontline workers can reduce accidents or "reportables" while improving training of processes/procedures and thus services/production/quality. Reduced accidents also result in reduced workers' compensation claims, lawsuits, and negative reputation.

- **Developing the capacity to migrate to digital or automated work environments—** Expanding the capabilities of workers to transition to more advanced technology systems at work is top of mind for most businesses. From electronic medical records, increased online self-service human resource support, and automated and smart factor production models, businesses must balance the deployment of these "future of work" innovations against the abilities of incumbent staff, especially at the frontline and entry levels. Keep in mind that the needs around "digital skills" may go beyond the traditional PC and office software typical in adult education services and may be custom solutions where the business needs your support.

- **Increasing customer service—** We can all think of poor experiences we have had. Quality customer service can be hard to find, whether it be retail sales, call center customer care, or a room attendant at a hospital. Many business sectors thrive or perish based on customer service, and customer-facing positions are critical. Even noncustomer-facing positions such as hotel room attendants or restaurant bussers have "incidental" customer contact that employers are very conscious of. Employers may also face challenges with the attentiveness and care workers show to customers. A customized ESL class can address these needs.

- **Providing a "benefit" delivered at no/low cost—** Employers are always looking for perks to make the workplace attractive to their workers. Offering training increases retention and can positively affect the morale and commitment of workers. Businesses that offer adult education services to workers often view this as a benefit they can provide that may cost them nothing or very little.

- **Becoming an "employer of choice"—** Employers are competing for talent at all levels. By offering adult education services, the business can differentiate itself from other employers by sending a message to the community that it values frontline workers. An ESL, high school equivalency, or citizenship class can help the business stand out from their competition and is a service the employer does not have to provide on its own. You do it!

- **Recruiting new workers—** Workers talk about their work with friends, family, and in their community. Frontline and entry-level workers who are also getting adult education services help the business build a reputation that it cares about more than "just work." Plus, you will talk about it too! Adult education services can help the business build a community reputation among your peers and partners that the business is a place worth referring students to for jobs.

What types of interaction, services, and results are employers looking for?

Businesses will have varying levels of sophistication when it comes to what they are looking for in an adult education service. Some have never tried it. Others have and found great success. Some have tried it and found it did not meet their needs. Here are common characteristics employers found in the most successful services:

- **A seat at the table—** Involving employers as partners and co-implementers from the earliest development phases of a project is critical. Avoid the perspective that you don't want to "bother them" with the details. It's usually not the case. They want a seat at the table and to share their perspectives and design needs. These are their workers after all!

- **Customization—** Chances are the service you offer and your community classes are not exactly what the business is looking for. That being said, customization does not have to also be a huge new project. It might just mean offering a class at a unique time, location, or under unique circumstances, such as a shorter period of hours per week. Sometimes the employer is looking for unique curriculum objectives. These are all things you're very used to doing, because adult education is premised on customizing around the learner's unique needs. Reframe that expertise for the employer.

- **Long-term planning—** Building long-term viability and or sustainability into program planning is important from the start. Employers are not usually looking for one-off solutions. While you may be focused on just successfully getting started, employers will have their eyes on the future of the program before they even begin. Be prepared for that.

- **Wrap-around support—** Frontline or entry-level workers are no different than students in your community. Sometimes they already are your students! The support needs will be similar. Considering the support needs of workers may be top of mind for the business too. Build support service needs as well as the related community partnership to deliver on those needs to your initial discussions and program design. This may include reaching out to your workforce board or community-based organizations for assistance.

- **Performance and business impact—** Measuring the performance and impact of a program from the business as well as the individual participant perspective is critical. Be prepared for that discussion. When only one perspective on performance—the employer or the participant—is taken into account, the results are at best inadequate and at worst may cost you the relationship with the business. We'll talk more about this in the next section.

Case Study: Performance Disconnect

The following case study demonstrates what can happen when business and participant needs are not synchronized.

> A nursing home worked with a provider to help the facility's largely immigrant workforce learn to speak English. After a 26-week ESL program, all 16 program participants were reported by the adult education director to have completed the coursework with flying colors. Post-test scores were improved for some by at least two levels from the pre-test baseline. In traditional adult education terms, the project was a success.
>
> The employer, however, reported that while the participating workers seemed happy about their improved English skills, they still had challenges communicating with their supervisors and residents using specific work-related terms. The workers were making the same mistakes after the program as before.
>
> The problem is probably apparent. The adult education program had not spent enough time understanding the employer's needs—in this case, specific workplace vocabulary—and did not collaborate well on how "what good would look like" and how success would be measured.

When employer partners are highly satisfied with adult education programs, they often co-invest in projects, promote our work to their counterparts in other companies, and remain willing to work with us in the future.

The above situation was rectified with additional resources for a short job-specific ESL course for the participants.

But how often do we have the option of making corrections after the fact? It is critically important that we find the correct satisfaction measures for our employer partners as close to the front of a project as possible, at the design phase of a class.

IV. How Do Employers Measure Program Impact on Their Business?

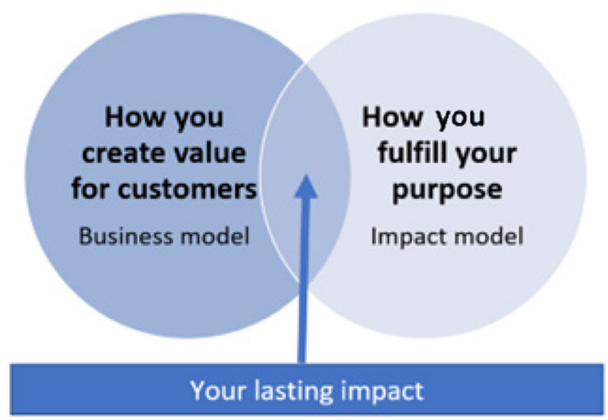
"Business impact" is the performance language of employers. Often, for adult education programs, individual or participant impact is our language and the language of our workforce development partners. These perspectives are important and not incompatible. The synchronization of these two "lenses" on outcomes will garner the most successful results.

Why follow a business impact model and how do we understand it?

If businesses follow the business impact model, it is imperative that we understand their perspectives and processes for measuring this to best find how adult education and workforce services can be a benefit.

- By understanding and speaking their language and being able to see the benefit of our services through their lens, employers will stay engaged longer.
- Employers will see the value and invest more in the program and in their staff.
- Employers are more likely to hire, retain, and promote participants who have increased basic skills and comfort with new technology. These new skill sets and the enthusiasm and increased sense of belonging they bring to the worker will show the employer that investing in basic skills pays off.

This simple diagram from business.govt.nz shows the impact when combined with the purpose of the business and understanding the needs of the customers.



Listen well and keep digging to learn impact!

Employers and individuals within a business look at performance in different ways. It often depends on the type of business and position within the business of your contact.

A production manager at an auto parts manufacturer that is moving to a more automated production environment will have different skill needs and performance expectations than a long-term care shift leader who desires to increase communications with residents or a distribution and logistics human resource manager managing high turnover.

It's important to listen well and ask good questions of your employer to learn the pressures your business customer voices. Continually look for ways that the employer says are an important measure of success and then align these to your performance measures.

An adult education program can be said to have a business impact if it positively influences the business' operations in one or more broad categories. These align well with the areas employers are often looking for in the first place that we described above.

HOW EMPLOYERS MEASURE IMPACT	WHAT EMPLOYERS ARE LOOKING FOR
The cost of doing business	Retaining workers Recruiting new workers Finding or developing skilled talent
Quality/customer satisfaction	Increasing customer service
Productivity/efficiency/safety	Developing capacity to migrate to digital or automated work environments Developing a safer or effective workforce
Competitive stature/market share	Becoming an "employer of choice" Providing a "benefit" delivered at no/low cost

What to watch out for

Well-considered attention to the impact desired by the business through adult education is a critical element to the success of the partnership and will keep them interested and invested from beginning to end.

A frequent barrier to effective partnership is the lack of understanding or poor communication between and among partners. The private and public sectors often do not speak the same language or are viewing ideas and situations through different lenses.

Usually though, what businesses want to accomplish through your services is typically the type of outcomes you are looking for in your program performance.

We all treasure what we measure, but how we view performance and the terms and jargon we use may be very different from how a business describes performance.

Typically, business won't describe success using teams we hold near and dear like pre-posttest, HSE, educational functioning level, IET, or measurable skills gain, so avoid those terms!

Instead, listen well and "translate" what the employers say and work to align this to your measures.

Let the employer define where change is needed, by what margins, and how they will recognize positive change when it happens. What the business wants will often be outcomes that require increased basic skills, digital abilities, English communication, or obtaining business-required credentials. These are the stock and trade of adult education performance accountability!

Aligning expectations on performance

Your role is to communicate and align what the employers say is important to what you need, and to do this in such a way that it does not become a barrier to the partnership. What evidence will be used to determine if the desired impact has occurred and by how much?

"Translating" business performance to your measures may look something like this. Again, we can use the areas employers are often looking for in the first place described previously.

What Employers Are Looking For	Adult Education Service/ Competency	Potential WIOA Measure[1]
Finding or developing skilled talent	Pre-testing to identify workers ready for advancement or areas of needed development Identifying "hidden talent," such as internationally trained professionals, through an intake interview	✓ MSG Type 1a or Type 4
Increasing customer service	English skills and ESL gains	✓ MSG Type 1a or Type 4
Developing capacity to migrate to digital or automated work environments	Reading and digital skills and gains	✓ MSG Type 1a or Type 4
Increasing safety/reducing accidents	Reading and English skills	✓ MSG Type 1a or Type 4
Obtaining business-required credentials	Reading, math, and English skills/ (depending on the certification) test preparation	✓ MSG Type 1a, Type 4, Type 5 ✓ Credential attainment

1 Workforce Innovation and Opportunity Act Performance measures. More at: https://nrsweb.org/policy-data/Resources-for-Reporting

Making the connection to your performance won't be difficult. Your role is to facilitate a dialogue with the business that helps all partners understand what is needed to meet each other's performance goals.

It is important to be able to speak the language of and translate between and among all the partners. Making certain that all partners fully understand their roles and responsibilities is critical to the success of a partnership program.

V. Good Communication—Developing a True Partnership With Employers

The creation of true partnerships with employers will be the barometer of your success in communicating with employers. You will recognize a true partnership with employers if they make substantial commitments to the program's design, implementation, evaluation, and continuation. Use strong communication tools to start building a lasting working relationship with employers.

A frequent barrier to effective partnerships is a lack of understanding or poor communication between and among partners from different sectors. The private and public sectors often do not speak the same language or are viewing ideas and situations through different lenses. Keeping your focus on how the employer talks about business impact is an important way to begin and keep employers interested and invested from beginning to end.

In the role of the education and workforce professional, we need to facilitate dialogue that helps all partners involved understand what is needed to meet programmatic goals. If the workforce board, immigrant-serving community organizations, or others are involved, it is critically important to understand their performance needs and perspectives and be able to speak the language of and translate between and among them.

Making certain that all partners fully understand their roles and responsibilities is critical to the success of a partnership program.

The memorandum of agreement, which we discuss more fully in the last section of this guide, will help you negotiate and solidify employer commitments to the roles and responsibilities that will be critical to success. These begin with clear communication about the following:

- ✓ Identifying employer-specific needs
- ✓ Providing available and relevant data
- ✓ Developing or customizing curriculum and other program elements
- ✓ Assisting or facilitating worker outreach, recruitment, and selection for services
- ✓ Providing instruction
- ✓ The time and place for services

- ✓ Compensation or incentives for participation
- ✓ Modifying work schedules when needed
- ✓ Providing or donating time, cash, equipment, materials, or training space
- ✓ Providing work experience or job shadow opportunities
- ✓ Assisting with job development/placement
- ✓ Advancement of participating workers
- ✓ Program oversight and evaluation (i.e., serving on a project advisory board)
- ✓ Exploring program sustainability

In the remainder of this guide we present strategies for developing employer interest in adult education services and obtaining employer commitment and maintaining it over the course of the project.

The process begins with establishing a relationship with the employer that enables you and the employer together to define the program objectives and performance and use them to design and manage services.

The foundation for this relationship starts with your understanding of the business itself. The following section describes the due diligence required to prepare for your first conversations with employers.

VI. Getting the Meeting

If employer engagement is new to you and your biggest worry is just finding employers who are interested in adult education and getting a meeting, how do you start?

To be a solution provider you don't have to "go it alone"

If you're reading this guide, you're probably not an expert in employer-engagement. You may be unsure how to start, not very comfortable with the concept of reaching out to employers, or feel like you're just too busy to start this journey. Don't worry. You don't have to be the trailblazer in this initial journey. It may just be time to reach out to your partners.

There are other people in the community who work with businesses every day. These may be people who you already meet or attend community meetings with.

Most **workforce investment boards** have departments that specialize in reaching out to businesses. These business service units have employers—not workforce clients— as their main customers. Their job is to help businesses thrive in the local community by making it easy for employers to do business and access services that the workforce board or board partners have to offer.

Another group that has businesses as its main customers is your local **community college, customized training department**. This group is often a revenue-generating department at the college whose job is to sell customized college training and services to businesses. They're often very entrepreneurial minded and are always looking for new opportunities.

Both of these potential matchmakers can lead the way for you and will be familiar with the services that businesses often ask about. By meeting with these new groups, you are also helping them expand their portfolio of what they can offer the business beyond high skill training or workforce center services.

These allies can work with you as partners to offer a complete solution for supporting the employer.

If done well, the employer who thought they were going to get an ESL class comes out with that, as well as training for management, access to job seekers, grant-funded services, and other valuable solutions for the business.

Let these groups open the door for you and ask to go to their meetings with businesses to learn the ropes from the experts!

VII. Homework Time! Due Diligence in Building the Relationship

Your relationship with employer partners will set the tone and chemistry of the project, and thus it is important to get it right. Diligent preparation will convey your intention to provide real and tangible benefits to the employer. You want your services to not be "just another government program" or misaligned education service.

Your first task is to understand the business or industry of the employer. Conducting due diligence effectively at this stage will make your meetings with the employer much more productive.

There are a variety of resources that will help you understand the issues confronting your employer's industry and individual business. Below is an outline of the types of information you should look for and possible sources for that information. You may not be able to find all the information elements listed below, but do your best to gather as much information as possible prior to your first meeting.

Review the company website, read the business section of local news, and talk to colleagues at your local workforce board or community college customized training department. This will provide multiple perspectives of what the company is and does.

Important areas to research will include the following:

- ✓ Significant products or services
- ✓ Market share and primary customers for key product or service lines
- ✓ Company size by workforce and by annual revenues
- ✓ Comparative position and reputation within the community/state (i.e., largest employer, primary employer of lathe operators, provides entry-level positions for low-income workers, imports high-level researchers, etc.).

Questions you should pursue in your research include the following:

- ✓ Has there been a prior relationship with either the workforce board, career center, community college, or community-based organizations? What were the results?
- ✓ Has the employer used the local career center or community college? How often? For what types of jobs? Who were the primary contacts for prior relationships both within the company and within these organizations?
- ✓ What are the predominant issues within the industry sector that might affect this employer and its labor force?
- ✓ Have demographic changes in the community created new opportunities for employment for immigrant and refugee populations?
- ✓ What are current industry trends? Is the company looking for workers or avoiding layoffs?
- ✓ What are the opportunities that the industry is trying to take advantage of?
- ✓ What are the problems, current and projected, that the industry is grappling with?
- ✓ Is the workforce for this industry/company aging? What is the current average age and median age?

Get in the game

One of the best ways to learn about the businesses and industries in your area is to get in their game by attending meetings frequented by businesses. Just like educators, businesses have their own local, regional, and state meetings and conferences. Each offers its own value.

Local meetings, like meetings of your workforce board, the Society for Human Resource Management (SHRM), the Association for Talent Development (ATD), economic development associations, and chambers of commerce are great places to learn the local ground game of what is happening in your employer community and what pressure points and trends are hot. Some of these groups will have separate “workforce” or “education” subcommittees. Look for meetings of these smaller topic-specific groups.

State-level meetings, such as your state workforce investment board meeting or state economic development meetings, are also good opportunities to learn about the macro trends in the state, such as demographic trends in the workforce, shifts or changes in emerging industries, major layoffs, and state efforts to attract business to the area.

VIII. The First Meeting (that will get you to the second)

So, you got the first meeting! Congratulations! Now your goal is to make sure that this meeting is impactful enough to the business to get invited back to discuss implementation in a second meeting.

You are the facilitator of a very important dialogue with the employer. You will also translate the employer’s needs to your programmatic needs and listen for where other program partners may be needed. For example, the conversation may venture into developing an integrated education and training program, so you will need to engage your local training provider or community college. Perhaps the business asks about hiring from a growing group of refugees who have located in the community. You will want to contact your local immigrant serving or refugee resettlement organization. Perhaps the business is having difficulty recruiting workers. In that case, the workforce board partners would be critical.

Your role is to listen well and dig beneath the surface of what the employer is saying, identify the most critical needs of the employer, and determine how the employer’s workforce plays a role in solving the problems identified.

A word about confidentiality

As you engage employees it’s important to understand the critical role of confidentiality in the relationship-building process. Employers must be constantly aware of and concerned about their competitive stature. Firm-specific information about workforce issues, proprietary products, processes, or strategies are protected and key to the employer’s competitiveness and reputation. Public organizations like schools and workforce agencies, by contrast, share data widely, often by statutory requirements.

Think through how your local policies and statutory or regulatory funding requirements will affect the employer’s need to keep information confidential.

Where do you have reporting leeway? Can you arrange to report data in aggregate terms only so that no one worker or employer can be identified? Are you willing to negotiate with the employer about which data can be shared and which cannot as you enter into a dialogue with the employer? You must provide the employers with assurances that proprietary information will be kept confidential.

IX. Listening Well and Digging Deeper

Don't assume that the initial problem that is presented by the employer is the actual problem or the most significant.

Remember that the employer knows his or her business but does not necessarily know about the education and training needs of their lowest skilled workers. You will bring your expertise to a mutual discovery process. Here are some examples from our work.

Two of our favorite stories took place very early in our history while working directly with employers and provides an example of how digging just a little deeper made a tremendous difference in addressing an employer's problems.

Example 1

A large West Texas welding company that services the oil and gas industry had reached out to the workforce board for assistance in supporting their growing number of skilled Spanish-speaking welders.

Welding was an area where we felt very confident. We were at a community college, and the director of the industrial sciences department—that included welding—was now the dean of the department I was in. We often saw each other and spoke at departmental meetings.

To prep for the meeting with the welding company, we met with the welding team and started doing our homework to prepare questions. We assumed that there may be a lot of need for an ESL class that addressed areas like safety, reading work orders, and perhaps measurement in the standard measurement system. We were excited and felt well prepared.

When we met with the business, we had a very good initial discussion and tour. When we got to the portion of the meeting about the actual needs of the business, we talked about our plans and what we had prepared. The CEO seemed very impressed and commented with insightful comments throughout.

Toward the end of the discussion, he said something that taught us a very good lesson: "I think everything you've described is well thought out and we really appreciate it. We probably do need support in some of these areas, but what I was really looking for was for these workers to just come in on a Monday morning and tell me how the weekend was."

The CEO went on to explain that they were a small and growing company and really valued the culture and community they had fostered. They did not want to lose that as they grew. He said that in this field, the work is hard, and he felt like they were developing two distinct workforces because of the inability to talk about things other than the work itself.

All the CEO really wanted was a basic ESL communication class! Of course, this was a curriculum we routinely offer in our catalog. For us, this was a good example of us overthinking the meeting and getting ahead of ourselves in presenting what we thought the business needed. The homework we did was very useful in the long run, and we did end up offering a contextualized ESL class focused on command English for safety, but the basic communication classes came first! We actually called the class, “Tell me about your weekend”!

The lesson we took away was that we needed to listen better at the start of the meeting to the reasons why the business sought our services out in the first place.

Example 2

Another important example stands out.

Another business in the community reached out to us at a local chamber of commerce meeting to discuss an upcoming resettlement of a large group of Afghan workers to our community.

While at the meeting, we spoke with a large manufacturer in our community who noticed we were from a community college. He said he had been meaning to call someone at the college about services for his company. He said a competitor in another area of the state had already hired a group of Afghan workers, and he was interested in doing the same to address his staffing needs but was not sure what to expect. We told him we would be happy to help, and we set a date to meet.

We went to the meeting fully expecting that the business was interested in an ESL class. When we got into the discussion, we learned that while an ESL class was something on their mind, like the welding company, it was not their main concern.

The HR manager explained that the company had already hired a small group of Afghan workers that had been in the community for a few years and these workers had been some of the most consistent and reliable workers they had. They were happy to talk about an ESL class but were much more concerned about how they could create a culturally sensitive workplace for these workers.

They explained that their desire was to try and attract 50 to 75 Afghan workers from this new resettlement group and wanted to create an inviting work environment that was also culturally and religiously sensitive for the new workers they planned to hire.

Increased English would be great, but their jobs did not really require English, so that was not top of mind. They were much more focused on working with us to learn how we could help them with a better understanding of religious, dietary, and work culture norms so they could make adjustments in their cafeteria, break times, and spaces for prayer time.

They said that the competitor in another area of the state had approached their local college about these services, but the college had told them, “They could only do ESL.” We smiled and said we would be happy to help. We explained that as an ESL team, we were very knowledgeable about students in our community classes.

In this example, the ESL class was important, but it wasn’t the main issue for the business.

We ended up providing a consulting service about making appropriate workplace accommodations as well as a class on cultural customs that we provided for managers and supervisors at the company in partnership with colleagues at the resettlement agency. We ended up offering ESL classes 6 months later when the workers arrived and were hired, including a curriculum on cultural norms in the U.S. workplace.

X. Prepping Potential Questions Before the Meeting: Considerations

Like you, the employer is new at this. Take your time to plan, don't make any assumptions, and avoid using educational jargon. Most of all, don't spend the first meeting explaining how institutional constraints like semester start dates, teacher availability, or performance requirements will limit your options!

Be sure to take time to explain options for how you see the program working as well as the pluses and minuses of each option. Let's begin with some general considerations the employer may need to consider. We will use a workplace ESL class example.

General considerations—Questions and options

Situation: The employer says it wants to support workers in increasing their English skills. They have a very good training room that is used throughout the day and evening, but there are always open slots.

On-site or off-site?

Perceived Positives: Offer the class on-site in the training room so workers do not need to leave the worksite.

- It is more likely that the class will see a greater number of workers participating, better attendance, and so a greater improvement in language skills.
- The class can be offered for more hours because there is no need to add extra commute time, so there will likely be skill attainment increases.

Potential Challenges:

- The training room is available consistently at the same time only one hour after the shift of the workers is over. Having to stay that extra hour may negate the value of having the class on-site.
- Training room availability fluctuates each week so the class time will change. The teacher and worker will need to adjust to the changing schedule. This fluctuation is hard for everyone and may disrupt attendance and focus.
- The training room is next to a loading dock. The noise disrupts the room frequently. It's difficult to teach language skills and pronunciation in an environment where listening is difficult.

Possible Solution: Offer the class off-site at a nearby location, such as a school, community center, or church.

- **Positive:** You will have more options for scheduling and workers may want to "get away from work."
- **Potential Challenge**: Once workers get in their car, things can change. They may stop off to grab food or realize that going home seems like a better option after a busy day at work.

Paid or unpaid?

Perceived Positive of Paid Time: Offering classes during work hours or with paid release time seems like the obvious right thing to do.

Potential Challenges:

- If there are more workers who want to take the class than there is room for them in the class or no availability for a second class, some students will not be able to participate. The company will be forced to select who gets in and who does not. This presents a new challenge for the employer (something you obviously don't want) and possible disgruntlement or resentment about the class from workers who don't get in. The business may also think that cycling the workers through class in cohorts is a solution because they do not fully understand how long language learning takes. One group of workers would attend for 6 weeks and then a new group can attend. This limits the amount of time workers have to learn English and may result in no one—the workers, the employer, and you—satisfied with the outcomes.
- Paying workers presents new work for the HR department and can be difficult, especially if it is overtime or release time. Try to avoid creating new problems for the business.
- Some workers may attend to get paid and be less interested in learning English. After all, getting off the line at work or spending an hour in an air-conditioned classroom may seem like a really good idea, learning English, not so much. This will hurt your outcomes. When the class is unpaid, it tends to attract the workers who really want to learn English and have convenient access to ESL services.

Possible Solution:

- Offer gift cards or other perks for class-based performance (not seat time). It is typically easy for the business to purchase gift cards, and because it is based on performance (earning an MSG or meeting an employer-defined outcome), you are more assured of positive performance for all and the employer will like the performance aspect of the model. We have seen employers do other things to incentivize attendance such as providing a valuable or useful product the company produces, allocating a day off of work, or allowing access to the company equipment for personal use, such as machine shop equipment.

Work-related or nonwork-related curriculum?

Perceived Positive: It's a workplace class, after all. The business wants the class to be about work-related topics, right? Not necessarily.

Potential Challenges

- While some workers will see work-related content as valuable for their jobs, other workers may not want to "talk about work" anymore, and have other objectives, like talking to their neighbors, the teachers of their children, or objectives common in ESL, such as getting a driver's license.
- Contextualizing ESL curriculum for the business is one more thing the business will need help with and the right staff may not have the time to sit and do that. If the employer desires a work-related class, be sure to explain what your process will be, who you need to talk with at the company, and what the commitment time will be.

This is a good discussion point for your employer and is related to you really listening closely to what is driving the interest from the company.

Some employers simply want to offer ESL services to create a positive benefit that will support the worker and their families more generally. They desire to provide the educational opportunity to help their workers matriculate into U.S. society. Many employers will see these types of services as part of their diversity, equity, and inclusion (DEI), corporate social responsibility (CSR), or environmental, social, and (corporate) governance (ESG) efforts.

Specific work-related questions

You've done your homework on the business and industry and have spoken to local leaders at the community college and workforce board who routinely engage with business. Now is your moment!

You're now well prepped on some of the general considerations that are good for employers to consider at the start. Now let us think about some questions we can prepare before we meet with the employer.

Beyond the general considerations described above, it's good to go in with prepared questions. These can help you in a few ways. They can provide you with good ways to drill down on conversations that will be helpful to target your approach, stay on track or redirect if the meeting hits a soft spot, and overall can act as guide if you get the jitters.

Most of all, these questions can show the business you really care about this meeting and have done research. Be sure though that you don't let the questions and research get in the way of listening well to the business as described previously!

Primary questions: These are the conversation starters and are typically easy areas for the employer to talk about.

Questions about staffing constraints and challenges[2]

- Is there a cohort of more tenured workers who were hired before practices were put in place to carefully screen new hires for basic skills and digital literacy?
- What is the company's strategy for recruiting new workers?
- Are new hires increasingly from immigrant or refugee populations?
- Has there been a drop in the quality of job applicants or new gaps in skills?
- Is turnover a problem?
- Does the company work with workers from a temporary staffing agency and would like to screen from that pool?
- Do frontline workers have key customer contact relationships?
- What about "incidental" customer contact where English is important?
- Are there problems with morale in the company?
- Are there challenges with relationships between supervisors and frontline workers?

Questions about technology, new equipment, or new processes

- Has the company recently upgraded or introduced new equipment or computerized systems?
- Is the company introducing automation or smart factory processes? Is the company hesitant about introducing such advances due to worries about upskilling current workers to work within the technological enhancements?
- Does the company want to shift certain human resource systems to self-service online options?
- Are frontline workers responsible for working with expensive machinery or machinery that, when offline, can represent costly downtime?

2 Some of these questions were adapted from Levenson, A. (2001). Investing in Workers' Basic Skills: Lessons from Company-Funded Workplace-Based Programs. (National Institute for Literacy). Available at https://eric.ed.gov/?id=ED462541

- Are career ladder opportunities available for workers? What is the most common pathway? Are there other less common pathways?

Questions about internal company processes or company culture

- What is the company's philosophy on training? What about training for frontline incumbent workers?
- Are internal promotions a key source of recruits for higher level jobs? If not, would the company like them to be?
- How important is communication with frontline workers?
- Is there a union that might be involved in these issues? Has the union been engaged in the conversation?

Secondary questions: You may be excited that the meeting is going well, but don't feel like you need to get everything in the first meeting!

Questions about prior solutions and prior experiences

- Have solutions been tried in the past? What happened?
- What would you do differently now, based on what's been tried in the past?
- Are the circumstances different now than in the past? In what ways?
- Who else, what other organizations, have been involved in helping you to find ways to address these problems?
- Have you been satisfied with their involvement? How could they be more responsive to your needs?
- Who trains and educates your workers now?
- Is training and education for workers paid by the company, by employees, or by some combination?
- How are employees selected for training opportunities?

Questions about defining success

- What success indicators would tell you that the effort is successful?
- What data elements can be collected to determine that the program is working?
- Can a comparison group be established to better demonstrate that the effort is having an effect on outcomes?
- Can we establish a baseline with data before the program starts in order to evaluate the program's effectiveness over time?

Questions about commitment

- Would your company be able to financially support a results-oriented workforce development intervention if we could help you design and implement it, or will you require funding and support?
- It is imperative that an employer be involved in the design, implementation, and oversight of a program from beginning to end if it is to deliver the best results for that employer. Would you be willing to work with us as a partner in this effort?

Questions about workforce training needs

- Will the employer provide paid release time for incumbent workers to be trained?
- Will the employer pay for the cost of training? Materials?
- Can the employer provide a training venue? If so, where?
- How many workers and supervisors will participate? (See Memorandum of Agreement for additional employer commitments.)
- If training was part of the solution in the past, was the training program customized to meet your specific needs? Did representatives from your company help design the curriculum?
- Were the affected employees consulted about what worked and what didn't? What were the results of any surveys or evaluations that have been completed?

Questions on staffing data

These are the drill-down questions that may require you to contact people or to seek additional information or contacts within the business for answers. They may also be good to use as follow ups in an email after the meeting for your second meeting with the business. They also may represent areas of confidential company information the company is not yet ready to share. Let the company know you are aware of the sensitivity of some of these areas.

- What are the skill levels and/or educational levels of workers in targeted occupational areas?
- How long do workers stay at each job on average?
- What is the nature of each targeted job, including, but not limited to, job descriptions, shift schedules, level of authority/autonomy, type and level of interaction with other workers/customers?
- How many workers do you have in each job category? What are current and projected vacancy rates?
- How does the problem impact the quality of your product? Customer satisfaction? Cost of doing business? Market share?

Questions on evidence. How does the company know there is a problem?

- How do you know that the impact you see is caused by the problems that you identified?
    - Have you spoken with others in your organization about these problems?
    - Is there agreement on the cause and the resulting impact?
    - What are the divergent perspectives, if any?
- Have workers been engaged in a conversation about these problems? Direct supervisors?
    - If yes, what do they say?
        - Are there ongoing meetings to gather information about employee attitudes or morale?
        - How are relationships between supervisors and workers evaluated? Do you have an in-house program to develop or support supervisors in their role?
        - Is there a union that might be involved in these issues? Has the union been engaged in the conversation?
            - What is the relationship history between labor and management?
            - Where is the company in the collective-bargaining process? When is the current contract up for negotiation?
            - Is worker education and training usually a component of the collective-bargaining agreement? Please describe.

- If together we agree to go forward to develop a workforce development intervention, would you be willing to host meetings for us with other managers and workers to ask them for their perspectives on these issues?

Building and Managing the Memorandum of Agreement

A Memorandum of Agreement (MOA) or Memorandum of Understanding (MOU) is a common term for an important document in partnership development. Check with your organizational leaders or your legal department to determine if they have a standard format or template they use.

The MOA can be used as a tool to negotiate specific commitments, as well as to confirm commitments by each of the partners. The MOA clearly defines an agreement. If money and space are involved, an MOA or formal contract will be needed.

MOA guidelines

- Be specific about the timeline of the agreement. Amendments can be added each year, if needed.
- Be specific. Include specific language on commitments, such as amount of release time, financial contribution, number of people served.
- Use the MOA as a negotiating tool. Developing the MOA gives you a chance to negotiate and get clarity around commitments from your partners. Meet with each partner before drafting an MOA to be clear about commitments. Send a draft of the MOA before sending the final.
- Develop a separate MOA for each partner.
- Each employer or partner may make different commitments. Also, there may be confidentiality issues defined in an MOA that should not be shared with other partners.
- Use the MOA as a commitment. Have two people from the company/organization sign it; the contact person on the project and his/her supervisor, so that the commitment runs through the organization, at as high a level as possible.
- Include your commitments to the partner.
- The MOA also assures your partner what commitments you or the project is making to them, including confidentiality agreements.
- Include an indemnity clause to protect both partners.

Project management

In addition to the MOA, or as a component of it, jointly establish a project work plan with all program partners. The work plan describes project activities and intended outcomes over time and includes each of the partners and their roles.

1. Project management and oversight responsibilities
2. Outside vendors and their roles
3. Project timeline with significant programmatic milestones and predicted impact
4. Schedule of program review, including outline of data to be collected
5. Description of decision-making authority

The work plan in conjunction with partner MOAs are your most important tools for gauging performance and responding to program hurdles and opportunities as they arise.

Identifying Levels of Impact

The program is up and running and you are feeling pretty good about it. Congratulations! But how do you know if you are really having an impact? What can you tell the employer about the impact?

In this section you will review your impact. The impact is the evaluation of the program. Levels of questions are simple to complex, specific to your program and business, and looking at long-term outcomes that impact the customer and business value of service.

It is beyond the scope of this guide to anticipate every business need that you may encounter as you work to create employer-responsive interventions. And it is beyond the scope of your role as an adult educator to know and understand every aspect of how the business will measure impact.

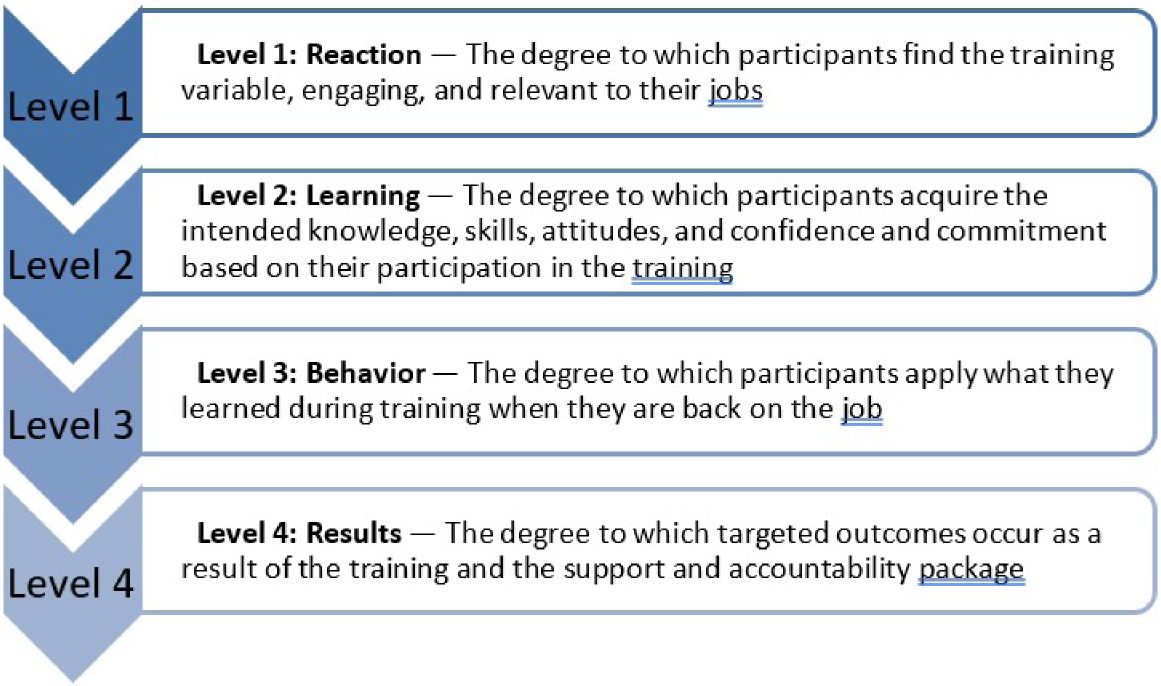
However, it is very important that you understand the general concepts of performance measurement in order to guide the employer to both identify success outcomes that will satisfy them and to commit to reporting the data that will evidence your progress.

A convenient model for evaluating success is the Kirkpatrick model[3] developed by Donald Kirkpatrick, a professor at the University of Wisconsin, for evaluating workforce training.

There are other models of course. We use Kirkpatrick's because the tiers or levels of impact provide a useful structure for organizing your conversations and negotiations with employer partners. We've elaborated on Kirkpatrick's basic concepts to include employer interests and to cover other workforce development interventions in addition to education and training.

There are four levels of impact for a workforce development intervention. The level of impact usually builds with time and resource investment, from Level 1 impact at the low end to a high of Level 4 impact.

3 More at: https://www.kirkpatrickpartners.com/the-kirkpatrick-model/



The following chart provides general evaluation questions for each level of impact. These questions can be asked at key points during the program's implementation, again at the end of the project, and perhaps at a time after the project is completed.

In dialogue with the employer, discuss the levels and how questions might be answered if impact at each level is achieved. Anticipating the evaluation questions will help you guide the employer to decide the focus of the impact on the business and what level of investment is required to achieve desired impact results.

In Level I, for example, you might ask the following questions:

- *What would it take to ensure that the participants are pleased with the program? Can we arrange a focus group to ask them directly?*
- *What would you like participants to be able to do with what they learn? May we ask them how the program can be designed to ensure that they can apply the most important skills to their jobs?*
- *How can we be certain that you are getting the information that you need from us throughout the life of the project, and that there are vehicles for you to keep us up to date on relevant developments?*

Level 1

Were the participants pleased?
What do they plan to do with what they learned?

Level 2

Does the employer feel as though his or her concerns have been heard and incorporated?
Has there been ample time and resources for ongoing evaluation, review, and mid- course corrections as needed?
What skills, knowledge, or attitudes have changed? By how much?

Level 3

How has the employer's capacity changed and in which areas? By how much?
Did the participants change their behavior based on what was offered in the program?

Level 4

How is behavioral change recognized/measured?
Did the change in behavior positively affect the organization? How? By how

A word of caution on evaluation

In dialogue with the employer, don't obsess about the Kirkpatrick model (or any model). This is not a research project, it is a solution for your business partner! Present options for success within the framework and position answers to the employer's questions with different levels of impact that can be achieved.

Anticipating the evaluation questions will help you guide the employer and provide a better focus on what level of investment and time is required to achieve the desired results.

Impact level and resource investment

Remember, investments aren't always hard dollars. Help the employer think about in-kind resources that might enhance the project. Use the charts above as a tool for framing the basic parameters of the project and for checking results as the project is implemented.

It should be made clear that while workers, adult education, and workforce development have an important role to play in helping the company reach its desired goals, unknown or unanticipated factors can often stymie program efforts.

Here too, identifying or aligning other investments in programming can eliminate some deterrents to success. For example, renting a van to transport workers to class, or hiring a childcare provider to watch participants' children during training may ensure higher attendance. In another example, if a rush order from an important customer causes a hiatus in training, the employer may be able to pay the cost of extending the training period. If not, the workers may not be able to attain all of the desired learning objectives.

The hierarchy of potential programmatic effects unsurprisingly often corresponds to the level of investment and time dedicated to the intervention. In other words, the desire for a higher impact level may require a greater investment of resources, time, and energy to achieve results.

> For example, an ESL class offered on-site at a company after hours may cause workers to feel better about the workplace, because the employer is offering an educational opportunity. Those who choose to attend regularly will most likely improve their English language skills. However, the same ESL class, offered on-site during work hours (maybe with paid release time) will likely see a greater number of workers participating, better attendance, and so a greater improvement in language skills of workers. If the class is offered for more hours over the same period or for a longer duration, there will likely be skill-attainment increases. If that ESL class also incorporates occupational information, which will require customized curriculum development, the employer will likely see an improvement in participating workers' actual job performance.

Consider with the employer what levels of uncertainty the project can tolerate.

> For example, an employer wants all workers in a unit to participate in the program but can accept an outcome in which only half of those workers are able to apply the skills they learn or use increased English on the job immediately. The employer may choose to provide the class on-site after work hours and offer an incentive for skill application on the job, gambling that half the participants will be motivated to complete to the desired level.
>
> An employer who desired more comprehensive results might instead pay for the workers' time during training as well as reward learning with promotion opportunities, pay increases, or bonuses.

PDCA Model for Process Improvement

Plan-Do-Check-Act (PDCA) is a widely used process for managing a project for the highest quality outcomes. The four steps, which occur as a repeating cycle throughout the life of the project, refer to ways to move a project forward. The process must be built into the project work plan to be useful and must involve all project partners in its execution.

PDCA effectively keeps projects advancing toward goals rather than toward the fulfillment of a work plan. PDCA is an evidence-driven process that requires data collection and analysis to verify whether strategies are working or in need of revision.

Bear in mind that consensus among partners is the primary decision-making vehicle in the PDCA process. With partner involvement, the four steps to PDCA are as follows:

1 – PLAN

First, plan the action. Or, in the case of a project underway, plan the improvement or solution to an identified problem. If there is more than one possible solution or problem area, focus on those that are expected to have the greatest impact on the process. Generate a list of potential improvements, their expected results, and prioritize their implementation.

2 – DO

Undertake the steps needed to effect the change desired. Take risks. This step allows room for learning from experience. Don't let the perfect be the enemy of the good enough! It is more important that you make something happen and get it implemented knowing that you will make midcourse corrections than to try and implement perfection. But do build in mechanisms for knowing whether the action is effective. What data will you collect and how will you know if you are achieving the desired results?

3 – CHECK

This is the study or analysis step. What does your data tell you about what is working and what is not? Measure and monitor the impact on performance of initial actions or modifications. Determine what you have learned thus far.

4 – ACT

Decide whether to accept or reject the action or change based on its impact and whether any changes need to be made during the remainder of the project. The key part of this phase is to put the lessons learned into wider practice. Incorporating lessons learned takes you back to the Plan step of PDCA.

Summary

- **Plan** how you will integrate lessons learned.
- **Do** implement new practices or other project changes.
- Check how the change is working or not.
- **Act** on new data, taking you back to the beginning of the cycle once again.

The PDCA cycle can be repeated to explore and improve one program area or can be used across a number of program areas. Use PDCA liberally until you reach the desired level of improvement in each targeted area.

Conclusion

The strategies outlined in this guide—understanding employers' needs, identifying areas of impact, developing MOAs—are crucial first steps to creating initiatives that respond best to the needs of your local employers.

The deep understanding that you develop of employers through the dialogue process will serve you well as you engage other program partners, design the project together, and jointly implement and oversee the project to the highest levels of performance. The MOAs are the tools you will use to manage commitments and continued negotiations with partners.

The relationships, knowledge, and commitments that you develop during this initial phase will also set the stage for important consensus-based decision-making during project implementation. You will build solid and lasting relationships within your employer community and a foundation for effective program delivery that benefits both your employer partners and the participants involved.

With this, you will be able to expand and support other employers to increase your presence and support the individuals in your community.

Appendix

This checklist tool is a quick resource to ensure you're getting details in specific areas that will help you with program design and to ensure you are being responsive to business needs.

It will help you in determining the needs of employers once you have done your due diligence and researched the company for your conversation centered on partnership. In addition, this is a helpful tool to determine your capacity for supporting businesses within your workforce program.

Program Assessment Checklist Tool

Name of Program____

Business: ____

Do I have this information from the employer?	Check off
Identifying the needs of workers?	
Knowledge of vacancy, job needs of employer?	
Knowledge of the demographics of employees?	
Knowledge of demographics of the community?	
Paid time for training/education?	
Modifying work schedule for training/education?	
Space for education/training?	
Job shadowing/mentoring opportunities?	
Advancement of employees as a goal?	
Evaluation of impact for the program?	

Is the Adult Education/Workforce Program Ready?	Check Off
Ability to provide flexible scheduling?	
Program alignment with needs of business?	
Career exploration tools?	
Curriculum-contextualized?	
Materials – work related?	
Technology needs?	
Outreach, recruitment, and selection model?	
Instructor available?	
Space needed for training?	
Oversight of training/education program?	
Evaluation of the program?	

Questions?
Coalition on Adult Basic Education (COABE)
888-44-COABE | www.coabe.org | behindeveryemployer@coabe.org