



Career Readiness Planning Institute

for

Oklahoma

Oklahoma Specifics:

Oklahoma Contact: **Terry Watson**, Director Workforce Solutions,
405.815.5206, terry_watson@OKcommerce.gov

Logistics:

Institute: June 14 to 16, 2010

Location: TBD

Pre-Institute Interviews: May 18 to 20, 2010 (tentative)

Location: TBD

National CRC Advocates Contact: **Bill Guest**, Executive Director
616.430.0828, bill.guest@ncrcadvocates.org
www.NationalCRCadvocates.org

The Career Readiness Planning Institute

The purpose of the planning institute is to share models for statewide alignment around the certificate and to provide support as the leadership team from your state adapts the material to the specific needs of your state. The models are based on lessons learned and best practices from the leading states. These models will help your team to develop: (1) specific goals for your state, (2) a budget for the statewide implementation, and (3) Return on Investment (ROI) calculations to quantify the benefits of statewide alignment around the certificate in financial terms.

The Planning Institute – A Seminar and Planning Event

The planning institute is designed to help the leaders in your state with your program. It would be optimal if the 10 to 15 key leaders in your state that will be responsible for the planning and leadership of the certificate program attend. Additional suggestions for membership in your “Guiding Team” are provided on page 9.

While we are calling this an institute, the sessions are essentially a three-day seminar with a mix of training and technical assistance to help your state make your plan and budget.

The following models have been developed to assist with this effort:

1. The Statewide Alignment Model
2. The Eight-Step Alignment Process
3. Penciltucky Budget Illustration
4. Skills Now! – A Case for Urgent Action to Build the Skills of America’s Workers
5. Goal #1 – Employer Engagement (including the Employer Handbook)
6. Goal #2 – Learning: Improving Workplace Relevant Skills
7. Goal #3 – Skill Certification Systems (including NAM, NCCER, etc.)

The event will run for 3 days. Participants are asked to arrive the previous day, if needed. We will spend all day on day one learning about the above models. The key emphasis is on the Alignment Model, the Eight-Step Process, the Penciltucky Budget, and Employer Engagement. The Skills Now presentation will be used as an overview and introduction. It is recommended that each participant download *Skills Now!* and read the presentation ahead of the sessions so that all participants are ready to work immediately upon arrival. The career coaching model and the certificate systems will not be a prime focus but are provided so the team is fully informed of potential next steps that deal effectively with the alignment of “soft skills” and occupational skills with the certificate. There will be exercises and time for discussion so that the team has adequate time to absorb the material and begin application to the state’s specific needs.

Link to download ***Skills Now! – A Case for Urgent Action*** (12.8 MB):

https://www.ncrcadvocates.org/PublicDocs/G4_Advocacy/Skills_Now_-_A_Case_for_Urgent_Action.pdf

The next two days will be spent in planning sessions. These are designed to be working sessions. The steps are:

1. The team will map out the “as is” status to have a clear understanding of the starting point. Many states have made investments in WorkKeys and CRC programs that provide an excellent platform for forward progress.
2. The team will calculate goals for the program that would lead to a significant change in the certification rates and educational attainment rates in the state. Goals are set in three areas: (1) employer engagement, (2) learning, and (3) certification. This program is designed to have a substantial impact on the state. Many programs have had wonderful anecdotal success. This program is design to “notch it up” to have a substantial impact.
3. The team will make a first draft of a three-year budget as a means to document certification levels and costs for the first three years. This provides a specific goal.
4. The team will then modify the Eight-Step Process to customize it for their state. All references to the Advocates would be removed so that the final product is solely the product of the team. This is a key document that the team will use to make presentations to state leadership to gain statewide buy-in of the goals and budget. This process details the journey from the “as is” to the “future” state based on achievement of the goals.
5. The team would then make a second pass through the documents to dovetail the plan with other state specific goals. The team will consider how priorities such as; soft skills, employability skills, sector strategies, NAM, NCCER, Energy, Green Jobs, career coaching, personal skills assessments, and career pathways might be included in the three-year plan.

Once the above is accomplished the team will select two or three participants to each take a turn to present the plan back to the team. We’ll run through these “dress rehearsal” presentations with questions and discussion as a way to work out the details and practice communicating the plan. We’ll also record action items as we discuss the plan.

Sessions will end at 2:00 p.m. on day three so the team can travel home.

Bill Guest

Preparation for the Career Readiness Planning Institute

Homework Assignments:

1. Look up Lumina “Big Goal” for your state
2. Read through “Skills Now – A Case for Urgent Action” and note key thoughts
3. Make notes on ideas you have heard from other states that you would like to discuss

Please collect and bring this information for your state to the planning session:

1. Career Readiness Certificate history
2. Data on CRC’s for each area: K-12, workforce, community colleges, Human Services, etc.
3. Educational attainment levels
4. Occupational certificate systems
5. Sector strategies
6. Employer associations and councils
7. Career pathways
8. Reports on the skills gap
9. Reports on middle-skills jobs
10. Reports on educational attainment
11. Strategic plans for increasing educational attainment
12. Strategic plans for increasing adult learning
13. Other items that should be included in the planning process
14. State-specific documents similar to the reports referenced in Skills Now!

Interviews – Listening Trip

Prior to the Institute we will schedule a “listening trip” to conduct one-on-one interviews of the participants. Effective planning builds on the previous work. This is the opportunity for each participant to advise the facilitator prior to the sessions so that we maximize the effectiveness of the planning sessions. We will attempt to schedule all of the interviews during a three-day block about one month prior to the institute. If anyone is not available during that time, we’ll conduct follow up phone interviews to ensure everyone has an opportunity for input. Draft questions:

1. What do you like most about your current certificate program?
2. What do you feel are opportunities for improvement?
3. If you could redesign or reposition the program, what would you like it to become?
4. What key initiatives are underway to accomplish the Lumina Big Goal?
5. How could the certificate program align to support achievement of that goal?
6. How effective is the current employer engagement part of your certificate program?
7. What suggestions do you have for changes?
8. How is your certificate program used to prepare adults for vocational training?
9. What suggestions do you have for changes?
10. How is your certificate included in certificate stacks and career pathways?
11. What suggestions do you have for changes?
12. What thoughts do you have regarding energizing an advocacy movement?

Schedule – Day One – The Models (Learning Best Practices)

- 7:30 – 8:30 Breakfast
- 8:30 – 9:15 Session 1: Skills Now! – Part One – As Is
- 9:15 – 10:00 Session 2: Skills Now! – Part Two – Vision and Goals
- 10:00 – 10:30 Break
- 10:30 – 11:15 Session 3: NCRC Alignment Model
- 11:15 – 12:00 Session 4: NCRC Eight-Step Alignment Process
- 12:00 – 1:00 Lunch
- 1:00 – 1:45 Session 5: Penciltucky Budget Illustration and Goals (based on Lumina Data)
- 1:45 – 2:30 Session 6: Employer Engagement – Advocates Goal #1: Employers
- 2:30 – 3:00 Break
- 3:00 – 3:45 Session 7: Learning Gains – Advocates Goal #2: Learning
- 3:45 – 4:30 Session 8: Skill Certification Systems – Advocates Goal #3: Certificates
- 4:30 – 5:00 Wrap Up, Feedback, and Departure
- 6:00 Dinner and social event

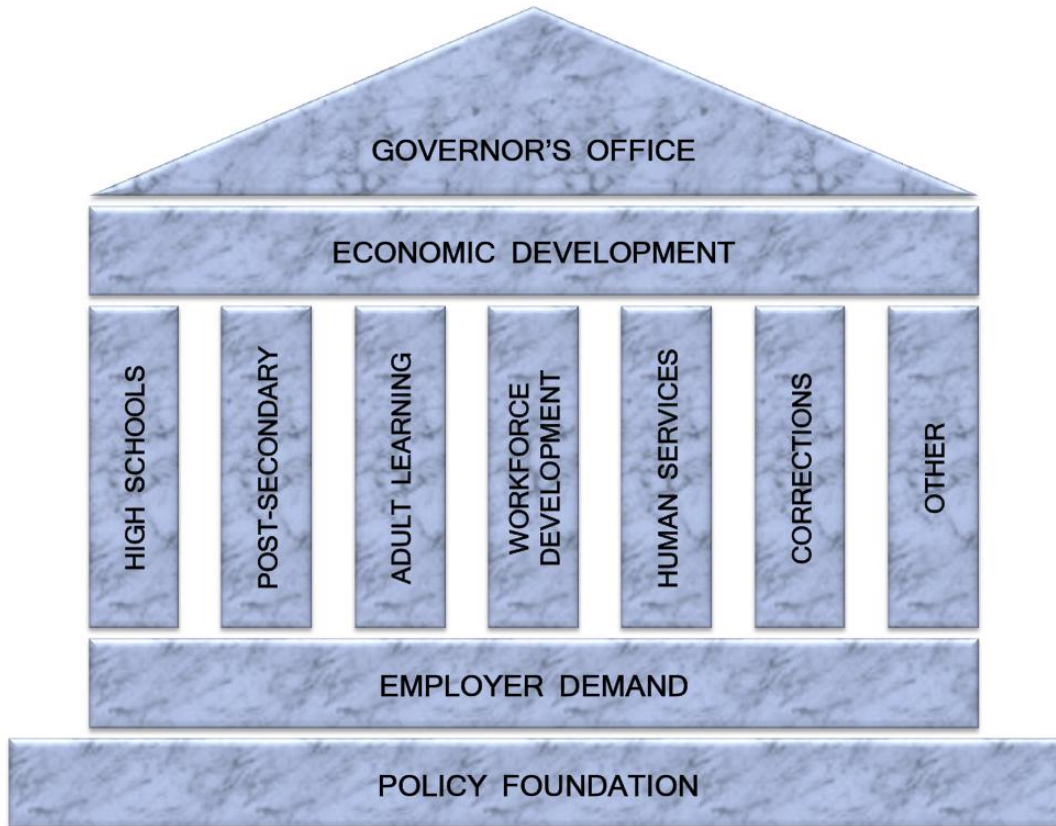
Schedule – Day Two – Building the State Plan and Budget

- 7:30 – 8:30 Breakfast
- 8:30 – 9:15 Session 1: Document the “As Is”
- 9:15 – 10:00 Session 2: Develop and document 3-year and long-term goals
- 10:00 – 10:30 Break
- 10:30 – 11:15 Session 3: Develop and document the 3-year budget
- 11:15 – 12:00 Session 4: Customize Steps 1, 2, 3, and 4 of the Eight-Step Model
- 12:00 – 1:00 Lunch
- 1:00 – 1:45 Session 5: Customize Steps 5, 6, 7, and 8 of the Eight Step Model
- 1:45 – 2:30 Session 6: Dovetail and Support State-Specific Priorities
- 2:30 – 3:00 Break
- 3:00 – 3:45 Session 7: Build the “draft” presentation and budget
- 3:45 – 4:30 Session 8: First practice delivery and edits of the presentation
- 4:30 – 5:00 Wrap Up, Feedback, and Departure
- 6:00 Dinner and social event

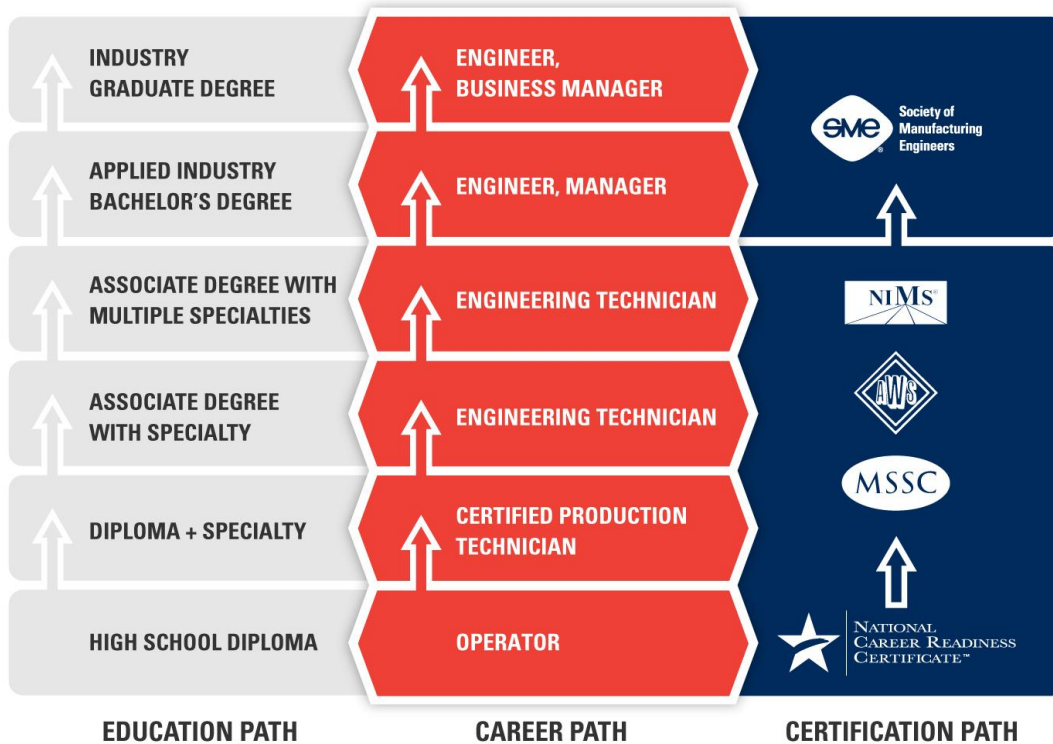
Schedule – Day Three – Communicating the Plan and Budget

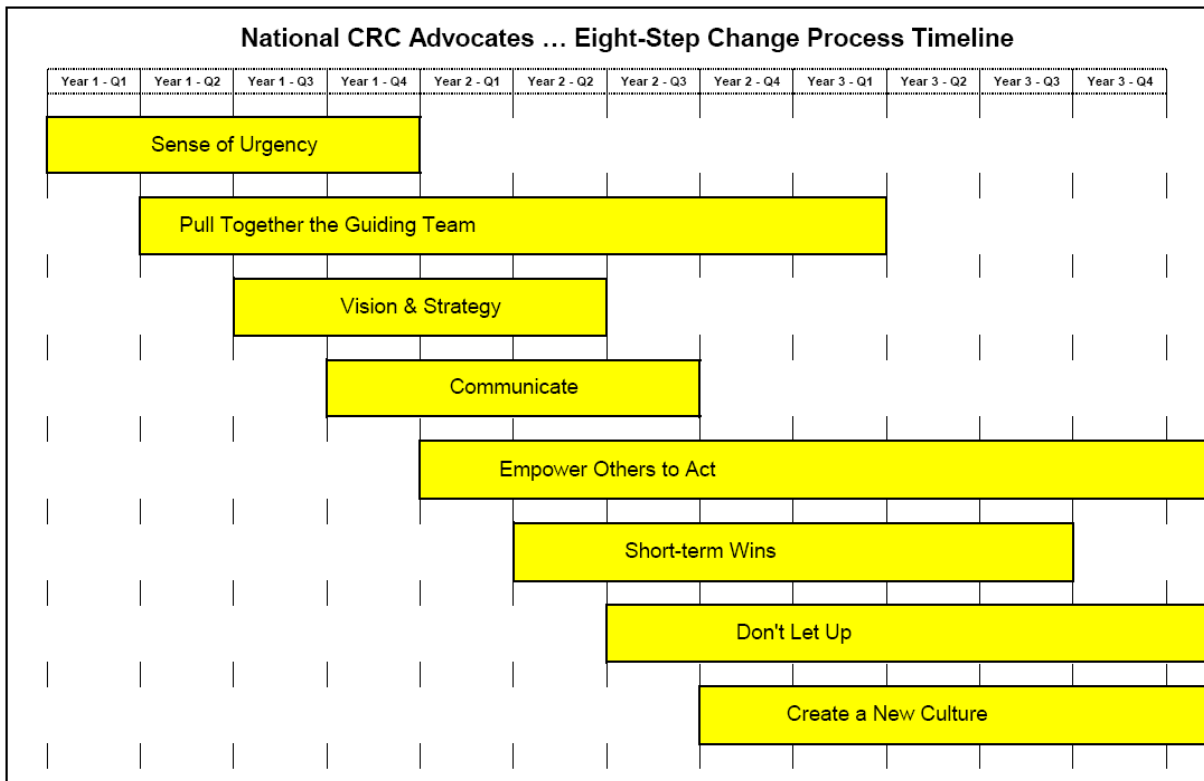
- 7:30 – 8:30 Breakfast
- 8:30 – 9:15 Session 1: Second practice run and edit of the presentation
- 9:15 – 10:00 Session 2: Final practice run and edits of the presentation
- 10:00 – 10:30 Break
- 10:30 – 11:15 Session 3: National CRC Advocates State Chapter and Website Support
- 11:15 – 12:00 Session 4: Record action items so the team jumps into action upon return home
- 12:00 – 1:00 Lunch
- 1:00 – 2:00 Open Issues List, Wrap Up, Feedback, and Departure

Statewide Alignment Model:



NAM- Endorsed Skills Certification System:





The Eight-Step Process of Successful Change:

SET THE STAGE

- 1. Create a sense of urgency.** – Help others see the need for change and the importance of acting immediately.
- 2. Pull together the guiding team.** – Make sure there is a powerful group guiding the change – one with leadership skills, credibility, communications ability, authority, analytical skills, and a sense of urgency.

DECIDE WHAT TO DO

- 3. Develop the change vision and strategy.** – Clarify how the future will be different from the past and how you can make that future a reality.

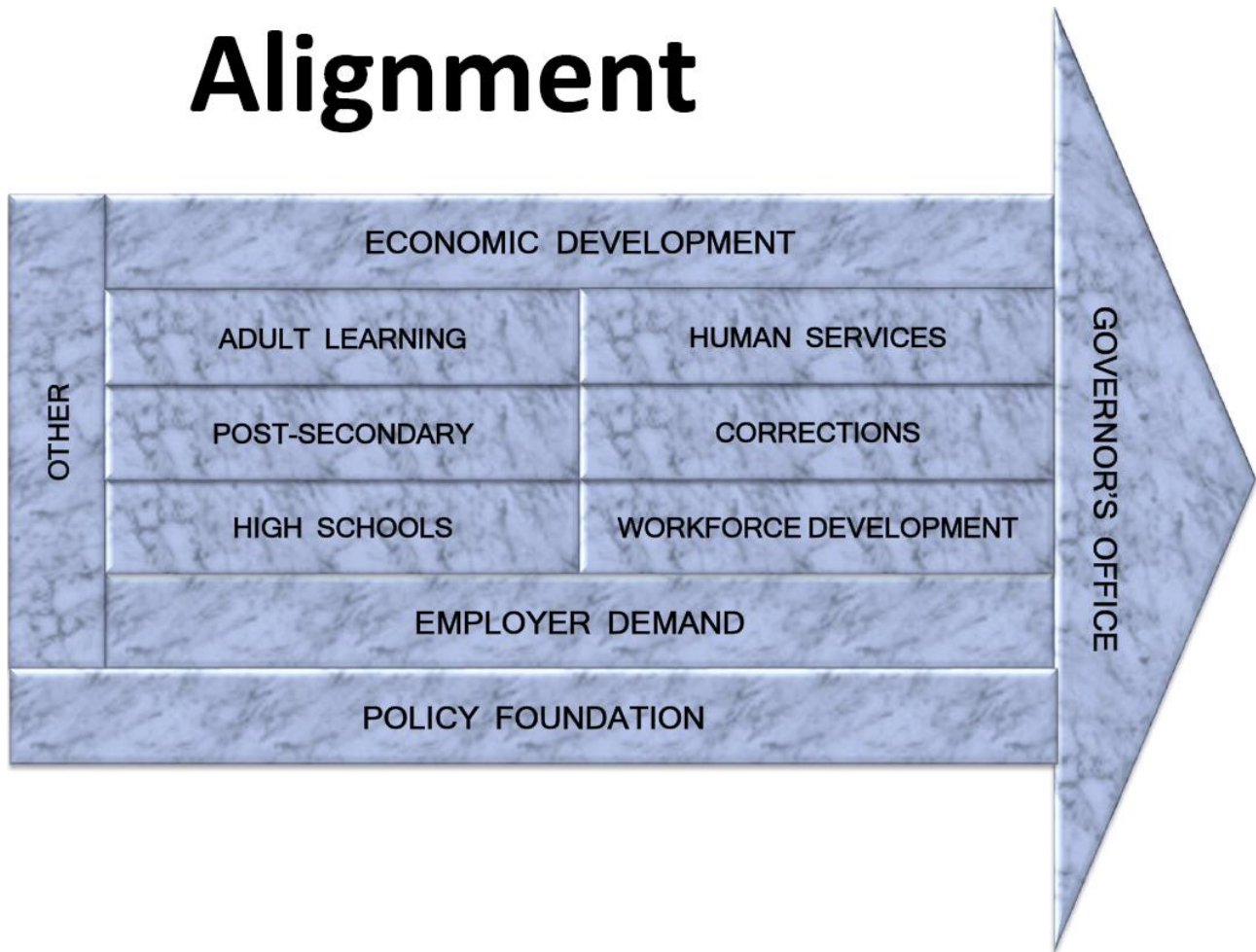
MAKE IT HAPPEN

- 4. Communicate for understanding and buy-in.** – Make sure as many others as possible understand and accept the vision and the strategy.
- 5. Empower others to act.** – Remove as many barriers as possible so that those who want to make the vision a reality can do so.
- 6. Produce short-term wins.** – Create some visible unambiguous successes as soon as possible.
- 7. Don't let up.** – Press harder and faster after the first successes. Be relentless with initiating change after change until the vision is a reality.

MAKE IT STICK

- 8. Create a new culture.** – Hold on to the new ways of behaving, and make sure they succeed until they have become strong enough to replace old traditions.

Alignment



John Kotter:

- ***Leading Change: Why Transformation Efforts Fail***, HBR, March 1995
- ***Leading Change***, Harvard Business School Press, 1996
- ***The Heart of Change***: Real-life stories of how people change their organizations, Harvard Business School Press, 2002
- ***Our Iceberg is Melting***, Harvard Business Press, 2005
- ***A Sense of Urgency***, Harvard Business Press, 2008

Building the Guiding Team - from *Leading Change* and *The Heart of Change* by John Kotter

The first step in putting together the kind of team that can direct a change effort is to find the right membership. Four key characteristics seem to be essential to effective guiding teams:

1. **Position power:** Are enough key players on board, especially the main line managers, so that those left out cannot easily block progress?
2. **Expertise:** Are the various points of view – in terms of discipline, work experience, nationality, etc. – relevant to the task at hand adequately represented so that informed, intelligent decisions will be made?
3. **Credibility:** Does the group have enough people with good reputations in the firm so that its pronouncements will be taken seriously by other employees?
4. **Leadership:** Does the group include enough proven leaders to be able to drive the change process?

This last concern, about leadership, is particularly important. You need both management and leadership skills on the guiding coalition, and they must work in tandem, teamwork style. The former keeps the whole process under control, while the latter drives the change.

Find the Right People:

- With strong position power, broad expertise, and high credibility
- With leadership and management skills, especially the former

Create Trust:

- Through carefully planned off-site events
- With lots of talk and joint activities

Develop a Common Goal

- Sensible to the head
- Appealing to the heart

What Works:

- Showing enthusiasm and commitment (or helping someone do so) to help draw the right people into the group
- Modeling the trust and teamwork needed in the group (or helping someone to do that)
- Structuring meeting formats for the guiding team so as to minimize frustration and increase trust
- Putting your energy into step 1 (raising urgency) if you cannot take on the step 2 challenge and if the right people will not

What Does Not Work:

- Guiding change with weak task forces, single individuals, complex governance structures, or fragmented top teams
- Not confronting the situation when momentum and entrenched power centers undermine the creation of the right group
- Trying to leave out or work around the head of the unit to be changed because he or she is “hopeless”

Example Goals and ROI Calculations:

Goal based on Lumina Foundation Data - NCRC Calculation for Oklahoma		
Less than ninth grade	63,178	3.6%
Ninth to 12th grade, no college	202,403	11.6%
High School Graduate or equivalent	552,110	31.6%
Some college, no degree	436,275	25.0%
Associate's degree	110,126	6.3%
Bachelor's degree	259,037	14.8%
Graduate or professional degree	124,344	7.1%
TOTAL (adults 25-64 years old)	1,747,473	100.0%
Sub-total less than Associate's Degree	1,253,966	71.8%
Goal: Cut in half, over 5 years, the number of people with an educational barrier.		
Half of those with less than Associate's	626,983	35.9%
Annual NCRC to address in 5 years	125,397	7.2%

Earnings of Workers (25 and over) by Educational Attainment Level - Oklahoma						
	Population 25 years and over	Population by Category	Participation Rate	Employed by Category	Annual Earnings	Total Annual Earnings by Category
3.62%	Less than 9th Grade	63,178	46.60%	29,441	\$22,662	\$1,431,739,836
11.58%	9th to 12th, no Diploma	202,403	46.60%	94,320	\$24,881	\$5,035,989,043
31.59%	High school graduate or equivalent	552,110	62.60%	345,621	\$33,609	\$18,555,864,990
24.97%	Some college, no degree	436,275	71.80%	313,245	\$39,106	\$17,060,970,150
6.30%	Associate's degree	110,126	71.80%	79,070	\$41,447	\$4,564,392,322
14.82%	Bachelor's degree	259,037	77.80%	201,531	\$59,356	\$15,375,400,172
7.12%	Graduate or professional degree	124,344	77.80%	96,740	\$70,559	\$8,773,588,296
100.00%	Totals	1,747,473		1,159,968		\$70,797,944,809
Impact if half of the individuals in each category move up to the next level:						
1,747,473	Population 25 years and over	Population by Category	Participation Rate	Employed by Category	Annual Earnings	Total Annual Earnings by Category
1.81%	Less than 9th Grade	31,589	46.60%	14,720	\$22,662	\$715,869,918
5.79%	9th to 12th, no Diploma	101,202	46.60%	47,160	\$24,881	\$2,517,994,522
23.40%	High school graduate or equivalent	408,846	62.60%	255,937	\$33,609	\$13,740,888,410
28.28%	Some college, no degree	494,193	71.80%	354,830	\$39,106	\$19,325,891,905
15.63%	Associate's degree	273,201	71.80%	196,158	\$41,447	\$11,323,341,124
10.56%	Bachelor's degree	184,582	77.80%	143,604	\$59,356	\$10,956,019,514
14.53%	Graduate or professional degree	253,863	77.80%	197,505	\$70,559	\$17,912,284,138
100.00%	Totals	1,747,473		1,209,915		\$76,492,289,529
	Increase in Earnings					\$5,694,344,720
\$5.7 Billion/year x 15% (FICA + taxes) = \$0.9 Billion/year Return						\$854,151,708

Big Ideas for Transformation

The *Advocates Mission, Vision, Strategies, and Goals* define the long-term work of the organization. Further, they define how the Advocates will monitor and report progress toward the goals. This document defines the transformational ideas that will help leadership change the direction from the current path to a new trajectory that will lead to the accomplishment of the Lumina Big Goal with the certificate program as a cornerstone. The certificate is an alignment tool to help focus and align all adult learning activities to support entry and/or re-entry into postsecondary occupational training.

Strategic Leadership – Align the certificate to support Lumina’s Big Goal.

- Have a 15-year plan to hit the Lumina Big Goal; 2010 to 2025
- Calculate the return on investment (ROI) for success in building “Human Capital”
- Train every government leader on the ROI and gain their support for investing
- Connect the certificate movement to the achievement of Lumina Goals
- Recognize that two-thirds of the 2025 workforce is already in the workforce
- Segment postsecondary preparation for: (a) two-year schools including 3-month, 6-month, 1-year and 2-year programs, and (b) four-year and above schools.
- That is: align postsecondary preparation to middle-skill and high-skill programs
- Calculate the degree gap and the number of degrees needed per year
- Calculate the foundational skill gap and the number of certificates per year
- Calculate the postsecondary completion rate needed to achieve the outcomes
- Create a detailed vision of the Educational Attainment levels in 2025
- Make a detailed year-by-year plan and budget to hit the goal

Employers – Manage Employers as a valued customer group.

- Use terms employers understand like: Talent Supply Chain Management
- Don’t expect your employer customers to solve your system problems
- Don’t expect employers to all ask for the same solution
- Organize the Talent Supply Chain to meet the needs of the employers
- Engage key employers in the design of the regional Talent Supply Chains
- Use both data and emotion to engage advocates and employers
- Document employer commitments with Letters of Commitment on the website
- Document employer case studies, job ads, and news clips on the website
- Use the website to help employers see that others are on board
- Use the website so regional employer groups can be formed and find each other
- Learn and use best practices in sector strategies to help key industry sectors
- Advocates need to work to get employers to recognize certificates – just like advocates worked to get admissions offices to require the ACT – driving demand
- Stimulation and documentation of employer demand is a “start up” issue
- Recognize that employer demand is the only legitimate basis for sustainability

Learning – Design effective learning systems with essential foundations first.

- Make sure everyone understands that foundations are essential to skill building
- Plot the relationship between Locating Information, Reading for Information, Applied Math, and the composite score to course outcomes (A, B, C, D, F)
- Select top predictors of success and set level scores as prerequisites
- Allocate seats in classes first to those with the proper CRC-WKs prerequisites
- Understand WKs levels needed for proficiency in the occupation
- Profile postsecondary occupational course content
- Compare levels needed for course success to levels needed for work success
- Build essential skills first, then build occupational skills
- Build employability skills alongside essential cognitive skills
- Ensure individuals have self-understanding as a basis of career path selection and education path direction
- Make sure individuals fit to the career before they start the career education.
- Individuals need to understand self first, then options, then direction
- Doing something right the first time is always more effective than doing it over
- Everyone belongs as a productive member of society. The talent supply chain must help each individual find where they belong and help them get on the path
- Individuals with a good plan need to be recognized and supported
- Support people to get industry-recognized credentials and degrees

Certificates – Build regional Talent Supply Chains that focus on industry-recognized competency-based credentials.

- Focus on industry-recognized competency-based credentials
- Teach employers the value of competency models and certificate stacks
- Help employers use competency models for incumbent employee development
- Don't wait – start with the CRC and occupational credentials now
- Clarify the difference between WorkKeys and the certificate

Advocacy – This is a new social contract. Engage people everywhere.

- Build advocates in every county
- Train advocates to stimulate and document employer-demand
- See advocacy as building a new culture – a culture of competency building
- Embrace everyone – invite everyone to be an advocate
- Measure and report effectiveness in creating outcomes; certificates and degrees
- Be an important part of the national advocacy for competency-based credentials
- Create and energize regional teams
- Host an annual state-wide conference