GROWING YOUR SKILLED WORKFORCE

A Toolkit for Manufacturers on Implementing the NAM-Endorsed Skills Certification System
This toolkit is a working document and will be updated periodically. To suggest changes or updates, please email AJ Jorgenson at ajjorgenson@nam.org

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Toolkit Overview

What is Workforce Certification?

Talk to any manufacturer and you’ll hear how difficult it is to find good people. Workforce Certification together with community partnerships is a strategy to build a talent pipeline to help ensure a steady supply of new employees for your company. In brief, Workforce Certification provides third party testing and validation of industry specific skills determined to be essential for specific jobs. See Step 1 of this Toolkit for an in-depth explanation.

Why a Toolkit?

Manufacturers understand perhaps better than anyone the value of good tools. Having the right tool makes it possible to do any job easier and better.

This Toolkit has two broad goals:

1. To demonstrate the value of community partnerships and workforce certification as THE SMART WAY to address your company’s talent needs.
2. To guide you – or someone tasked with this challenge – through the necessary steps to create a new improved talent pipeline for your company.

The process and tools explained in the following pages provide a road map for manufacturing companies traveling the path to workforce certification. Until now, this work has been done by a small number of companies that have each evolved their own techniques and tools. This manual brings together their BEST practices so that others who do this work can benefit.

Who is it for?

Several people in your company or facility have a stake in solving workforce challenges, and this guide should be helpful for you no matter where you sit in the company structure. In many small and medium-sized companies, one person may hold several of these roles!

<table>
<thead>
<tr>
<th>Owners</th>
<th>You have a vision of a better talent pipeline to help ensure the success of your company into the future; you just need a little guidance (or a roadmap for your staff) to help you create that future.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives/ Managers &amp; Supervisors</td>
<td>You may be frustrated with the quality of workers you’re getting and how much effort it takes to train them; then they leave! You’re searching for (or have been tasked with) finding a better way to keep the business running.</td>
</tr>
<tr>
<td>HR professionals</td>
<td>Your company is expecting you to solve their talent problems; you need ideas and a road map you can follow.</td>
</tr>
<tr>
<td>Training professionals</td>
<td>You train your heart out in what seems a never-ending battle to instill, enhance, and then keep the talent necessary to make your operations work smoothly. You long for a better way.</td>
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</table>

Your company is unique! Yet most companies struggle with similar concerns . . . and often figure it out for themselves after a lot of blood, sweat and tears. This Toolkit was designed to help YOU, no matter your industry or size. While a uniform six-step approach is presented, along the way you will find a variety of options and various resources just right for your size and situation.
How is This Toolkit Structured?

First, we answer the question WHY? We help you consider the cost of an open position and the costs associated with your current hiring practices. Then we look at the Return on Investment (ROI) for implementing Workforce Certification.

Once you have made the decision to move forward, then we focus on the HOW. This Toolkit is designed to walk you through the typical steps necessary to implement Workforce Certification. Sometimes the steps occur in tandem; or they may take place over a longer time.

Each company must answer the basic question, *Is certification right for us?* before it is ready to begin the process outlined here.

What is Certification? Is it right for us?

Marketplace demands, evolving technology and new processes alter the nature of the work and what is required of employees; so regularly revisit what has been put in place in order to sustain and improve it.

This step turns a successful pilot into an ongoing process that is sustainable over time. It may also mean expanding the focus (or reach) of the initial pilot to the next level.

Having clarified (and updated) the exact skills they require for their job, the company now needs to agree on a good certification match and in some cases determine the exact skill levels they require for their job.

By this point, the employer is deeply invested. Now, work out the details to implement certification. As with any new process, employers often want to “test” or pilot the approach in a limited environment.

This Toolkit is organized around these process steps. Each chapter (or tab) tackles a step, describing the work to be done and the recommended tools for doing this work.
Layout of Each Step

Each of the steps in this Toolkit covers the following topics:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Topic</th>
<th>What it Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌍</td>
<td>Overview</td>
<td>Each step in this Toolkit begins with a high-level overview of the step so you see how it fits within the overall workforce certification process. Those interested in only a quick overview can focus here.</td>
</tr>
<tr>
<td>📚</td>
<td>Preparation</td>
<td>This section provides a checklist of things to be done as you begin the step or prior to meeting with your internal or external partners as outlined in the step.</td>
</tr>
<tr>
<td>🛠️</td>
<td>Facilitation</td>
<td>This section suggests best approaches to help you facilitate the planning and decision-making work of this step.</td>
</tr>
<tr>
<td>✔️</td>
<td>Success</td>
<td>A brief checklist describes the achievements you should see when this step has been successfully completed.</td>
</tr>
<tr>
<td>🔧</td>
<td>Tools</td>
<td>Finally, each step lists tools available to support the work to be done. Each tool is briefly described and links are provided so that you can access and use the tool.</td>
</tr>
</tbody>
</table>

You’ll be able to jump to any step and to any of the above sections at any time, simply by clicking on the appropriate tab.

How to Get Started

Begin with “What is Certification & Is it right for us?” to make sure you understand workforce certification and have examined the financial impact it can have on your company.

Once you reach agreement that it is something you need to do, you’ll want to review the rest of the steps to ensure you have a high-level understanding of the overall process for implementing workforce certification. Then return to the beginning and work through each step, using the tips and tools presented as a road map to guide you along the path to implement your workforce certification program.
Step 1 – Decision: Is Certification Right for You?

What is Certification? Is it right for us?

Analyze Company Skill Needs

Develop Pilot Plan (Beta)

Match Job Certification & Skill Levels

Institutionalize (Deploy) Certification

Improve and Sustain
Overview

Before committing the time and resources outlined in this Toolkit, company leaders need to answer two basic questions:

What is certification?
Many companies have heard about workforce certification; but owners, managers, and even HR professionals may not understand what it really is. Tools and resources in this section can be used to help you and your staff learn about workforce certification, how it works, and its benefits.

"Is certification right for us?"
Once you have an understanding of workforce certification, answering the question, “Is certification right for us?” is straightforward. You may help your company leaders look at the value (or the ROI) certifications can provide, and whether it is something the company wants to pursue.

The tips and tools in this section are designed to equip you to facilitate these discussions.

Preparation

Obviously, to lead others through this step it is critical that you have a clear grasp of skills certification and its value to manufacturing companies. You should thoroughly study the background information provided in this section to ensure that you have the necessary understanding and comfort discussing these issues.

Decide WHO needs to be part of the discussion around these questions. Depending on the situation, this could be any number of individuals:

- The company owner or senior leaders
- The operations manager or supervisors
- The HR manager, or a trainer

You might want to run some preliminary numbers through the Workforce Certification ROI Calculator in advance of any formal meetings. This can give you the confidence to know this is worth pursuing. (See TOOLS: Workforce Certification ROI Calculator)
The Problem: Open Positions and the Skills Gap Cost You Money

We all know that money talks! Before you or your company move ahead with any initiative it has to make sense! The short answer to “Why should I get behind this?” is: Open positions and the skills gap are a threat to your success AND cost you big money.

Manufacturing Challenges

Surveys and reports on manufacturing consistently report that finding talent – qualified skilled workers – is one of the most significant issues facing the industry. How many of these challenges have you experienced?

- Parents and teachers who discourage kids from careers in education
- School systems biased toward liberal arts education, even though many students need different options
- Pitifully few (and hardly any qualified) applicants for your open positions
- Uncertainty about what an applicant’s education and training has really equipped him/her to do
- Lack of confidence if an experienced worker has the skills to do what your company requires
- Veterans who may have transferable skills, but you’re left guessing because the terminology and descriptions do not match

Hits to Your Bottom Line

The challenges around hiring and onboarding new employees result in a host of added costs:

- Recruiting and hiring costs mushroom because it is so hard to find people
- On-the-job training is time consuming, costly to provide, and delays getting people on the floor
- Turnover increases because employees don’t work out, resulting in hours of wasted time; and then you start over
- Productivity and quality suffer, with a corresponding rise in customer complaints
- Lost opportunities occur due to back-orders, long wait times, which means the additional work you’d like to take on goes to your competitors

Add-up these costs and you’ll quickly realize that talent problems are costing your company dearly. These bloated costs undermine profitability and your ability to compete. Our online Workforce Certification ROI Calculator helps you do just that.
Calculating the Costs – The ROI of Workforce Certification

Recruiting and Hiring Costs
Most companies incur several costs when attempting to fill open positions, including:

• Advertising for applicants
• Interviewing candidates
• Internal meetings to screen and select candidates
• Testing candidates
• Fees paid to a placement firm or temporary agency

One way to arrive at your company’s true hiring costs is to add up these costs and divide by the number of hires.

In a minute we’ll introduce you to an on-line calculator; but here’s a quick and dirty way: An American Management Association Trendwatcher (7/13/2010) article suggested that the cost of hiring and training a new employee ranges from 30% – 200% of annual compensation.

The Return on Investment Calculator walks you through the steps to coming up with your own costs for your company. In many cases, the costs are higher than companies initially estimate, especially when considering the impact on overtime, productivity, and training costs.


The Solutions

Increasingly we recognize the vital role that local manufacturing companies play in sustaining healthy communities. They create livable wage jobs and generate wealth for our cities, counties, and states. We can and we must solve our talent pipeline challenges. The good news is that the solutions are not difficult and the rewards are significant; but it requires that we make some deliberate investments.

Solution 1: Industry Certifications
Health care provides a good example of the value of certifications. Regardless of which nursing school someone attends, in order to become an RN they pass the National Council Licensure Examination for Registered Nurses. Everyone understands what that means and views it as a validation of the individual’s knowledge and skills. In the same way, we need a unified, comprehensive educational pathway to ensure a skilled manufacturing workforce and to improve competitiveness for the industry.

Solution 2: Business-Education Partnerships
Business-education partnerships are necessary to provide the talent to keep manufacturing humming. Colleges can no longer afford to set up one-off programs and churn out graduates in hopes they’ll find employment. We do a disservice to students when we send them into the job market without tangible credentials that are recognized by employers across the country. In addition, businesses cannot bear the added frustration and expense of having to guess at candidates’ skills, and then provide the training that should be the responsibility of our schools.
Solution 3: Community Partnerships
Additionally, a number of other community partners are eager to help you construct the talent pipeline needed to support manufacturing in your region. They can help locate, prepare, and support new workers for your industry. To make the talent pipeline work, manufacturers and communities must band together as partners in a spirit of cooperation and mutual support.

The sections that follow explain each of these solutions in greater depth.
Solution 1: Implement Industry Certifications

How Certification Works

Workforce certification can be complex; after all, many things are required for a worker to be successful on the job. Several levels of certification might qualify a person for a position as shown by this pyramid.

**Core Technical:** Core technical skills that impact the bottom line include: safety, quality and measurement, maintenance installation and repair, production, and sustainable manufacturing. Would you hire with more confidence if a candidate had third-party verification of these?

**Occupation-Related:** High-demand occupations are matched with critical industry certifications in such areas as machining and welding. At the top of the pyramid are managerial and specialty occupations, including engineering.

**Foundational:** There are basic skills that cut across all sectors in manufacturing. Would it help you to know if your new employee possessed these things?

- **Personal effectiveness:** In other words, will they show up on time, be dependable, and demonstrate initiative?
- **Academic competencies:** Do they have basic applied skills in reading, writing, math, and locating information? Can they communicate effectively, follow instructions, and read manuals?
- **Workplace competencies:** Can they demonstrate critical thinking, work in teams, and solve problems?

The National Career Readiness Certificate is one way of assessing these foundational skills. (You will learn more later about specific certifications!)
Industry certifications are not tied to a single educational institution; they are not awarded by a school but rather they are awarded by an independent third party that maintains the assessments and oversees their administration and use. An industry-endorsed certification validates an individual’s knowledge and skills as compared to industry standards. It takes the “guess work” out of the hiring process and provides an objective assessment of the skills needed to do a specific job.

While third-party certification can be awarded after testing, totally apart from the education process itself, embedding certifications within education pathways just makes sense.

The Manufacturing Institute is helping to identify common industry-specific technical competencies to support skill building for high-demand manufacturing careers. Those include the broad functional areas of work, such as safety and quality, and targeted occupations such as welding and machining. The Institute is also working with employers to map career paths, such as the one illustrated below.

When jobs are linked together to form career paths, and analyzed in light of the many credentials that prepare individuals for entry-level and increasingly more advanced jobs, we find that the credentials are “stackable,” and they become the building blocks of a Skills Certification System.

Obviously, the U.S. has a ways to go until there are certifications at every level and they are properly aligned with the thousands of jobs in manufacturing. It will take time for colleges all across the country to understand the value and incorporate these certifications into their curriculum; and it will require more manufacturers recognizing the value of hiring certified workers and creating demand for these certified workers.

Benefits of a Skills Certification System

If it’s not already clear, let’s emphasize that Industry Certifications are a true WIN-WIN for everyone. They provide an objective way for:

- Employees or students to validate their talent to employers all across the U.S.
- Education providers to establish the value of their product
- Employers to have a level of certainty about the skill level of an individual before hiring them

Let’s look briefly at the benefits to each.
As an Employer you have increased confidence and ease accessing a skilled workforce; and you can focus your recruitment energies on other important qualities you are looking for. As a result, you reduce hiring costs, minimize the costs of re-training an unprepared new hire, improve workforce productivity, and reduce turnover. It can be shown that manufacturers not only cut expenses; they increase revenues.

Students (future employees) who’ve been certified find that their skills are recognized and this gives them a leg-up in the job market. Once hired, they find themselves better prepared, because typically their education included an internship experience.

Education Providers with programs leading to industry certifications demonstrate a tangible outcome that delivers real career value and attracts students to their program. Their strong partnerships with local manufacturers helps ensure internships and job opportunities; students are more willing to invest in training that clearly leads to work in their new career field.

In short, using industry certifications as a tool to address talent challenges can positively impact a company’s bottom line and an individual’s career options.

Solution 2: Create Business-Education Partnerships

With the growing demand for highly skilled workers in manufacturing, many communities are exploring ways to engage younger students in technical training. High schools, two-year, and four-year schools are coming together to work on this. These efforts may be labeled: work-based learning, pre-engineering, pre-apprenticeship, or science, technology, engineering, and math (STEM) education. Many of these have industry certifications embedded within them.

In the past, business-education partnership simply meant that businesses would pay for equipment, or perhaps sign-off on something. More is needed. To be meaningful, partnerships must be substantive, and produce tangible benefits for all parties.

Your voice can make a difference. As manufacturers, we should expect to influence the focus and quality of technical programs provided by our educational system. You should feel fully empowered to call your local community college and get involved.

What HR Representatives Say

Industry certifications help take the guesswork out of hiring and promoting because they provide a valid, independent evaluation of a worker’s competencies.

Sylvia Wertzel, CLO, Bison Gear & Engineering

At Sun Hydraulics we believe developing and certifying the skills of our workforce is a direct investment in the productivity and overall performance of the company.

Tim Twitty, Operations

Candidates with the MSSC CPT certification are familiar with key manufacturing concepts like safety and quality before they walk through our door. That allows them to be more productive sooner.

Thomas A. Barnes, HR Manager, Bilstein

If you are firmly convinced of the value workforce certifications provide, you will be more effective as you lead this effort for your company.
Create Real-Life Work Experiences to Deepen Learning

It goes without saying that we learn more when DOING something than we do sitting in a classroom. Educational institutions need YOUR help to create real-life work experiences.

Work-Based Learning is the broad term for any process outside the school that effectively integrates classroom curriculum and training with workplace experiences to enhance learning and to develop strong academic and workplace knowledge. It emphasizes the student-employee as a learner first, provides student skill development through alternative methods of education and training, and rewards and acknowledges learning that occurs on the job.

You can access a Working Guide to help you implement Work-Based Learning [HERE](#).

Internships provide an employer-based learning experience for a student that offers supervised practical application of academic content in a professional setting related to a student’s career goals. Internships can occur during the academic year or the summer. Many educational institutions are eager to make connections with manufacturers willing to partner with them to create these experiences.

Apprenticeship programs are another powerful tool to help close the manufacturing skills gap. The U.S. Department of Labor defines apprenticeship is an “earn and learn” training model that combines work-based learning with related classroom instruction using the highest industry standards. An apprenticeship can:

- Formalize work-based learning.
- Show workers exactly how to progress toward their career goals.
- Help companies know who is on the path toward promotion into new positions or to replace retiring workers.

Apprenticeships may be registered or unregistered.

- **Registered Apprenticeships** are managed by the U.S. Department of Labor, which publishes nationally approved training models and verifies the credentials of individual learners.

- Companies may also set up their own **unregistered apprenticeships** to meet their individual needs. The important elements include:
  - A **structured learning pathway** that documents learning that occurs both on the job and in the classroom.
  - **Competency-based standards** that allow for advancement based on demonstrated performance, as opposed to strict minimum times that were more traditional.
  - **Industry certifications** can be an important measure of these competencies.
Whether your apprenticeship is registered or unregistered, you may conduct the training in-house or partner with training centers, technical schools, or community colleges. The goal is to provide workers with advanced skillsets that meet your specific needs.

The Manufacturing Institute has created a complete guide with accompanying tools to help set-up internships. It covers the following key steps:

1. Workforce Planning
2. Building a Business Case
3. Public-Private Partnerships
4. Program Design
5. Branding & Marketing the Program
6. Selection of Participants
7. Monitoring Program Performance
8. Transitioning Out of the Apprenticeship
9. Maintaining Program Relevance

You can access it [HERE](#).
Research Possible Education Partners

So, you’re eager to see more collaboration between manufacturing and education, but where do you begin? There are so many academic programs that it’s hard to know where to start. Here are two suggestions:

- The Manufacturing Institute publishes the M-List of schools that are teaching up to industry standards and providing access to manufacturing certifications. The list identifies schools with quality manufacturing programs, the certifications they offer, descriptions of their degree programs, and a list of contacts. Check out the list. How does your region stack up?
- Most industry certification web sites (see List of Possible Certifications) have lists of partners who administer their tests. Go to the site for the certification you are considering to locate a list of their accredited test facilities – usually at one of the schools in your area.

Of course, you will go to their website(s) to look at their technical programs in manufacturing, engineering, and other STEM training. You need to know they have solid outcomes that meet your needs!

Credit vs Non-Credit Programs

Community colleges generally have two separate delivery structures: credit and non-credit. It is important to recognize which you are dealing with and which is best for your needs. Academic programs offer credit and formal credentials ranging from one-year certificates to associate’s degrees or bachelor degrees. Some advantages of working with the academic college are:

- Students have the chance to attain an associate’s degree or other college credential.
- Students have more access to financial aid, the GI Bill, and other financial supports.

Non-credit programs are typically shorter and provide industry-specific training. Some advantages of working with the non-credit side of the college are:

- They are usually more nimble to create new courses and programs.
- Course content can often be customized for a single industry sector or employer.
- They may be a good choice for your incumbent workers (lower-cost, easier to enroll, shorter). This can provide an excellent vehicle to get your people trained in something necessary to win new business or maintain production schedule.

The Manufacturing Institute believes that it is in the best interest of companies and students for manufacturing programs to lead to college credit and industry certifications. This is also the best way to make sure as many students as possible can enter into technical programs and build a career based on lifelong learning.

Connect with the President and Dean

The president and/or dean of the college can be a great ally in getting new training programs set up in a timely manner. They can also assist you in developing other programs, including internships and apprenticeships. Here are some questions to ask education providers:

- Are your programs credit or non-credit? In non-credit programs, how can students earn credit for their learning? Do the non-credit programs articulate to credit?
- Will the credits transfer and apply toward a college or university degree?
- Does your program lead to certifications in the Skills Certification System? If yes, which ones? If not, do you have plans to build certifications into your programs?
- How many students earn the certifications?
- Who is on your industry advisory committee? How often does it meet? Can I speak with the chair and other industry representatives?
Set an Objective and Push for Results

Most education providers want to be responsive to employers, so it helps if you are very clear about your objectives and stick with them until you get results. Make it clear you are interested in technical training that leads to industry certifications—those that make up the Skills Certification System.

However, this cannot be a one-way street. You should be able to offer one or more of the following:

- Join an industry advisory group; actively participate in helping shape the curriculum.
- Share a job analysis of your key recruitment needs, including the competencies and industry certifications you value or require.
- Donate equipment that may help modernize a program.
- Offer plant tours for students in the program.
- Set up a formal process for student internships. (See below)
- Agree to interview students who earn your preferred industry certifications.
- Recognize the certifications in your interview and hiring processes.
- Provide testimonials the education provider can use in marketing their programs.
- Volunteer to assist with learning activities, like SkillsUSA and FIRST Robotics teams, and capstone projects.

Solution 3: Build Community Partnerships

Changing fundamental components of your business like recruiting and HR practices can be difficult; however, you needn’t go it alone. A number of community partners and workforce intermediaries exist to support you, address your challenges, and connect you with resources.

Available partners vary from state to state; and you may seek out different partners depending on your industry sector, the size of your company, your needs, and the degree of activity already underway in your area. Here are some typical partners found in many communities:

- **The Public Workforce System:**
  - Workforce Investment Board (WIB) – These regional entities were created to implement the [Workforce Investment Act of 1998](https://www.doleta.gov/). The WIB’s main role is to direct federal, state and local funding to workforce development programs. WIBs conduct and publish research on these programs and the needs of their regional economy. They also oversee the One-Stop Career Centers.
  - One-Stop Career Centers – Established under the [Workforce Investment Act](https://www.doleta.gov/), the centers offer training referrals, career counseling, job listings, and similar employment-related services.

- **Regional Economic Development Organizations** – Many communities have economic development officers or agencies in place to provide assistance to employers and address issues of concern to them.

- **Manufacturing Extension Partnerships** (or MEPs) are government-sponsored groups that work with small and mid-sized U.S. manufacturers to help them create and retain jobs, increase profits, and save time and money.

- **Manufacturers’ Association** – Most states have a state association affiliated with the [National Association of Manufacturers](https://www.nam.org). Your state association can be a great resource.

- The **Manufacturing Institute** addresses the current and future skills and workforce development gaps through the three pillars: image, quality, and policy.

- **National trade associations (and your local chapter)** are usually knowledgeable about your industry’s challenges and opportunities. They will connect you to information, programs, and services as well as with other manufacturers.

- **Other manufacturers** – Who else in the community needs to hire workers with similar skills? If you are having a challenge finding the right talent, you can be sure other companies face the same challenge and will be eager to partner with you to find a solution.
• **Chamber of Commerce** – Some chambers have a manufacturing liaison or committee that is focused on manufacturing. They can connect you with other manufacturers and with useful resources.

• **Wrap-around, support services** – Community based, social services agencies often focus on helping individuals reduce barriers so they can be employed. United Way often funds these groups and can point you toward agencies that may be good partners.

In summary, don’t go it alone! No matter where you are in the process, it makes sense to reach out to community resources and partners. A key component of building a talent pipeline that solves many of your workforce challenges is building partnerships across your community.

Now, if you’re convinced that it’s time to take action, then you’re ready to move on with the other steps in this Toolkit.
Success

It is important that your leadership has settled in their own minds that certification is right for them BEFORE investing the time and energy to pursue the additional steps outlined in this Toolkit. You’ll know your company is READY to move on to the next step when most of the following are true:

- Your leaders understand workforce certifications and how they, together with community and education partnerships, are beneficial.
- You have calculated some preliminary ROI numbers, and you are convinced your investment of time and resources in this effort will pay-off.
- Your company has one or more problem positions where a more reliable talent pipeline is needed; and you want to be more certain of applicants’ skills in order to make better hiring decisions.
- The team is ready to do an initial analysis of one or more jobs to determine if there might be a match with one of the NAM-endorsed certifications.

NOTE: A compiled checklist containing the success indicators for ALL steps of the process can be downloaded HERE. You may wish to print this and use it to track your progress as you make the journey to implementing certification.

Tools

There are a number of educational tools available to help manufacturers understand what workforce certification is, how it works, and why it might be beneficial for them.

- Booklet: Developing Skilled Workers
- Booklet: Implementation of a Work-Based Learning Model
- Booklet: Employer’s Playbook for Building an Apprenticeship Program
- PowerPoint: Building the Manufacturing Talent Pipeline
- Manufacturing Institute flyers on a variety of Skills Certification System (SCS) topics
- Success Case Studies (Employer Spotlights) from a variety of companies
- Handout: Calculating Value and ROI for Workforce Certification
- Online resource: Workforce Certification ROI Calculator

Each tool listed above is previewed on the following pages; when possible a link is provided that will take you directly to the tool.
Booklet: Developing Skilled Workers

The Manufacturing Institute has developed a one-stop, how-to guide on developing and recruiting a skilled workforce. Written by and for manufacturers, the toolkit on Developing Skilled Workers speaks to chief executives, human resources professionals, and operations managers, with steps to take, partnerships to build, and templates to use to grow their talent pipeline.

You can access this booklet through the Tools and Resources for Manufacturers page.

Booklet: Employer’s Playbook for Building an Internship Program

This 7-page booklet developed by MAGNET of Ohio provides the basic instructions and tools needed to help an employer establish an internship program.

This manual focuses on setting up internships for post-high school students.

Manufacturing Institute Flyers on a Variety of Skills Certification System Topics

The Manufacturing Institute has developed a number of 1-2 page flyers to help explain the Skills Certification System. You may wish to print specific flyers and hand these to company leaders; or email them as attachments.

All of this information can be accessed HERE.
Success Case Studies (Employer Spotlights)

Manufacturing leaders want to know if skills certification will actually WORK for them; and whether implementing this approach is a smart business decision.

Several short case studies have been collected which help illustrate various kinds of successes that have been realized as a result of implementing the Skills Certification System.

You can access these case studies [HERE](#).

Calculating Value and ROI for Workforce Certification

This 6-page document provides a simple overview and examples that illustrate how companies can calculate the value (ROI) from implementing workforce certification.  

Online ROI Calculator

The Return on Investment calculator is an online tool that allows you to enter your company’s numbers in order to calculate your workforce hiring and training costs. It also allows you to estimate the cost of implementing a variety of workforce solutions and the potential return-on-investment from each given your financial situation.

The real-time ROI calculation updates with each entry so you can play “What If?” games as you make various assumptions and entries.
Step 2: Analyze Company Skill Needs

- Analyze Company Skill Needs
- Develop Pilot Plan (Beta)
- Institutionalize (Deploy) Certification
- Match Job Certification & Skill Levels
- Improve and Sustain
Overview

To implement workforce certification you must first have a clear understanding of the skills needed to perform a job or family of jobs. There are ways to get this clarity:

- Perform an **Informal job analysis** based on job descriptions – This can be accomplished during one or two meetings with company employees in key positions related to the job to be analyzed. This is something you will be able to facilitate.

- Complete a **formal job analysis or job profile** – Companies that require a legally defensible certification system may opt to complete a formal job analysis or job profile. This work requires an assessor trained and certified in the process. It typically costs between two and four thousand dollars. Most often, you will bring in another resource if required to do this.

Let’s explore each approach, with emphasis given to the informal process. Conducting a full job analysis goes beyond the scope of this Toolkit.

Informal Job Analysis

Since a comprehensive skill analysis usually costs two to four thousand dollars per job, companies often prefer to do an informal job analysis. In this Toolkit, we focus on the informal job analysis. A good starting point is the job description. The revision date provides some idea of how current it is; but even if it is recent, it may not be **accurate**. It is futile to put energy into locating an industry certification that matches a job description that does not accurately reflect the job.

Preparation

In preparation for an informal job task analysis, you might want to:

- **Get familiar with the job** and its skill requirements.
  - Secure and review the job description for the position. Is it well written and does it fit with what you know about the job?
  - Observe the job beforehand if possible, noting the general responsibilities, working conditions, kinds of interactions with other employees, foundational skills needed (e.g., reading, math, observation, mechanical ability) and physical/mental demands.
  - Review any training materials for the position. Look for specific skills taught.

- **Plan/Set up a meeting** to conduct the informal job analysis.
  - It is usually best to plan for 90 minutes.
  - Ensure meeting is calendared, space reserved, and correct participants have been invited. Best participants include:
    - Knowledgeable supervisors who manage employees doing the work.
    - Experienced incumbent workers who represent diversity and who can speak to the day-to-day work challenges.
    - HR or training professionals involved in hiring and training employees for the job, and
    - The management leader for the functional area.
  - Send (or at a minimum prepare and bring along) a meeting agenda.

- **Share any background slides and handouts** that may have been presented during earlier sessions with those in their organization who are NEW to workforce skill certification so that they are up-to-speed when this meeting begins. (You want to avoid a complete re-hash of your earlier meeting topics because of the additional new participants joining your team late.)
Facilitation

Keep these tips and techniques in mind as you meet with the team to facilitate the informal job analysis.

- Depending on your company’s meeting culture and meeting space, it may be useful to have some slides on-screen to guide the session, or you could use a handout or flipchart.
- Adjust your approach to the participants present.

A typical agenda for this meeting includes the following: Getting Started

- **Introductions** – There may be new players in the room; take a few minutes for introductions if necessary; ensure everyone’s role is clear.
- Review the **purpose and the agenda** – You may have sent this in advance, but it is good to bring along hard copies; or post it on a flip chart or a slide if you’ll be using slides to guide the session.
- **Set the stage** – Review the company’s challenges (from previous conversations that took place prior to this meeting) to set a context for the meeting and the work to be completed.

- **Review the Advanced Manufacturing Competency Model**
  - It is helpful to begin by painting the broader picture (rationale) behind skills certification.
  - Highlight the levels or types of skills and corresponding certifications.
  - Make the point that before any meaningful match can be made, it is critical to first ensure that the job description accurately documents the skills needed for the job.

Several slides from the PowerPoint: *Building the Manufacturing Talent Pipeline* and other handouts provided as part of the Step 1 Tools can be useful at this point. (If you have previously covered these, make it a quick review.)
- **Introduce Career Pathways**
  - Point out the relationship between the certification system and career pathways. (See slides from the above PowerPoint on pathways.). Certifications are often an enhancement to the learning or training that takes place in a career pathway.
  - Mention that as you progress you will want to look at how the certification program we are building fits within a career pathway.

- **Analyze and update the job description and identify skills needed.** Point out that an accurate job description is the necessary foundation for selecting the right candidates (and identifying the certification that best matches the needs of the position). Then go through the job description with the experts in the room.
  - Share any questions or concerns you identified during your job description review.
  - Does the job title accurately describe the position? If not, is there a better job title?
  - Is there anything critical to the job not mentioned on the job description? Facilitate dialogue to get them thinking and talking about the day-to-day work. Not every discrete task needs to be on the job description; yet these things may be important in relation to the certifications. (Be sure to capture detailed notes for use later in your matching work.)
  - Do the specific skills required still accurately reflect the needs of the position? Employers might have implemented changes, such as automation in production processes.

**Review and Wrap-up (Next Steps)**
- **Next steps** – As you wrap-up the meeting, take a couple minutes to explain the overall process and the next steps along the path to implementing the certification system. At our next meeting, we will be matching this job to one or more appropriate certifications and setting the levels needed.
- **TO DO’s** – It is a good idea to capture any assignments as the meeting progresses. This can be done on a flip chart or by a note-taker. Review these now. Add any additional assignments that the group thinks will be important to move the process forward.
- **Next Meeting** – If possible set a next meeting when the action items will be reviewed and the next steps will be taken.
**Full Job Analysis**

If necessary, a **full job analysis or job profile** can be completed in order to more accurately identify the job skill requirements and possible certifications that might apply.

**WHY do a full job analysis?**

There are many reasons your company might wish to do a formal job analysis:

- You may wish to redesign multiple jobs, blend or eliminate jobs, and develop others as part of a restructuring or lean process.
- In order to adequately address a job with high turnover or high hiring numbers, your company may want a more accurate picture of the skills and tasks than an informal job analysis provides.
- You might be in the process of creating a new production line or seeking to attract a new customer base, which may require new skills and/or new equipment.
- The company might want to foster a collaborative culture within the organization by including more participants in the process.
- Union considerations or requirements—as a part of an existing contract, or to begin to lay the groundwork for the next one—may necessitate a more formal process.
- If the goal is to create alignment with a local college’s curriculum, a more formal analysis may be requested by the college as part of their instructional design process.

**HOW a full job analysis is conducted**

A full job analysis involves a number of key individuals in an organization and a specially trained facilitator who guides the subject matter experts through a formal process that helps them identify the knowledge, skills, and abilities required for the position. The results are used to determine the scores required on the ACT WorkKeys National Career Readiness Certificate (NCRC) in order to successfully perform a specific job. Details and related information about the job task analysis can be found at these sites:

- [https://www.act.org/workkeys/analysis/](https://www.act.org/workkeys/analysis/)

Other job analysis systems are available for analyzing and understanding job requirements.

For most *middle skill* manufacturing jobs, this level of analysis is not necessary unless the employer intends to use the assessment as a **criterion for selection**. In that case, a certified assessor should be brought in to ensure that the process is legally defensible. If you make the certification ‘preferred’ rather than required, you can avoid some of the legal issues. It generally costs $2,000-4,000 to do this. Unless grant funding is available, many companies, especially the smaller ones, will not go this route.
How to locate a job profiler

Some large companies have had someone in HR certified as a “job profiler” so that any time a position comes up they can profile it. Other companies have an ongoing relationship with someone at their local community college or with a consultant who does this work for them. Most community college workforce departments have staff familiar with and often certified to do formal job analysis; or they have a partner organization that is available to assist with doing this analysis. Reach out to your local college if you require assistance or need help finding a profiler.

One of the most common job analysis systems is provided by ACT WorkKeys National Career Readiness Certificate (NCRC). Details about the process and how to access these services is available at: http://www.act.org/products/workforce.act-workkeys/

Local HR organizations such as the Society for Human Resource Management (SHRM) can provide additional information on other job profiling systems. Some of the more common ones used in conjunction with education partners include Saville-Holsworth LTD and Developmental Dimensions International (DDI).

Success

You will know you have completed the necessary work and are READY to move on to the next step when most of the following are true:

- You have confirmation that the job description accurately describes the job and skills required.
- The group has begun to think about certifications that may match the skills required.
- They continue to express interest in moving forward with implementing a workforce certification for at least one job.
Step 3: Match Job Certification & Skill Levels

- Analyze Company Skill Needs
- Develop Pilot Plan (Beta)
- Institutionalize (Deploy) Certification
- Match Job Certification & Skill Levels

Improve and Sustain
Overview

Having clarified (and updated) the exact skills required for the position, you now locate an appropriate certification that matches your needs. There are three primary tasks to accomplish in this step:

1. Research and identify possible industry certifications.
2. Select the best certification/s that most closely match the needs of the position.
3. Establish (set) the appropriate levels for the various skills. For example, the National Career Readiness Certificate (NCRC) has individual scores for each competency and bronze, silver, gold, and platinum levels based on common scores across all three; other certifications, like NIMS, have levels 1, 2, and 3, and some are pass/fail.

Preparation

Your careful preparation between meetings will ensure that each session is as productive as possible. Prior to beginning Step 3, you should do the following:

- Send a follow-up email to the group summarizing the outcomes from the previous Step 2 meeting and outlining the work to be done.

- Identify the National Career Readiness Certificate (NCRC) scores that seem appropriate to you based on the job description and the information in the ACT database. You will share your preliminary thoughts during the upcoming Step3 meeting. Over the years, ACT has acquired an extensive database of NCRC scores based on job titles and classifications. The ACT website provides a great resource for this work.

- Research possible industry certification matches. Compare the job skill requirements with the metrics in the industry certifications and select the assessments and levels that seem to you to be a close match to the position.
  - Most of this research is completed on-line by visiting the web sites of the various certification vendors.
  - Look for certification skill lists that seem similar to the job requirement for the position you are reviewing – Do the descriptions listed there appear to parallel those you see on the job description?
  - If you need assistance:
    - Reach out to your local community college for assistance.
    - Request the services of a professional job profiler (see Step 2: Full Job Analysis)
    - Send a copy of (or link to) the certification web site pages along with a copy of the job description to an instructor who teaches these skills and enlist their help to see if there is a match.

- Collect data to share with your team. During your web research, copy and paste details regarding the skills validated by each assessment; OR copy and save the relevant links. Then during your upcoming meeting, you can easily access the information as you review/discuss the certification details.
Send the Step 3 Meeting Agenda. Consider including links to best-matched certification web pages so that participants can review the information in advance. (Here it is helpful to know your audience. You don’t want to overwhelm them or confuse them. Based on your audience, it may be better to just walk them through this information in person.)

- We’ve reviewed your job description/s – we think the _________ might be a good match. Here is a link, If you have time, you might take a look.
- OR, We’ll take a look at this together during our meeting to see what you think.

Depending on the number of jobs under consideration, the size of the company, and the complexity of the certifications, you might form Pre-Work Teams with the following assignments:

- **Team 1** – Establish foundational skills and levels (NCRC, MSSC)
- **Team 2** – Gather employee representatives from common occupations to consider technical certifications and set levels
- **Union and management discussion** if needed prior to common meeting
- **Team 3** – Work with college staff to review existing curriculum, what certifications are currently offered, and how much capacity or how open they are to this effort. You may want to do the same with Workforce and Economic Development, if they are important partners in the region.

The Step 3 meeting then becomes a large group meeting where each sub-team presents their findings and recommendations.

**Facilitation**

Keep these tips and techniques in mind as you meet with company personnel during this certification matching step.

- Make sure that the right stakeholders are present so that you can leave this meeting with final confirmation of the certification match. Possible players include:
  - Supervisors and Hiring Managers,
  - Human Resources
  - Trainers
  - Key Employees (Subject Matter Experts)
  - Union Representatives, if appropriate.

- **Getting Started**
  - **Welcome and Introductions** – Introduce any new players in the room; take a few minutes to get to know them and to highlight their contribution to the effort.
  - Review the **meeting purpose and the agenda** – You may have sent this in advance, but it is good to bring along hard copies; or post it on a flip chart or a slide if you'll be using slides to guide the session.
  - **Recap Progress** – Review the history of the group and what has been accomplished in the weeks leading up to this meeting.
  - Pass out copies of the **updated job description** and highlight the changes that have been made, especially those relevant to the certifications that you will be recommending next as good matches for the position.
  - **Answer any questions** those present may have.
• Discuss/Agree on National Career Readiness Certification (NCRC) and Set Levels – We recommend the National Career Readiness Certificate (NCRC) as an initial certification for most jobs. This assessment measures three key foundational skills for success in middle-skill jobs. Candidates who have the foundational skills to read, apply math, and locate information (including reading charts and graphs) should be able to complete any of the other assessments and should be prepared to enter the work environment and quickly learn the required tasks.

  o Provide an overview of the Career Readiness Certificate.
    ▪ Use website pages or the Intro to NCRC PowerPoint. You may want to use some or all of these slides as part of your presentation to the group.
    ▪ Get confirmation from the group that this certification is appropriate and useful for the position.

  o Discuss and agree on the required level
    ▪ You may choose an overall level such as bronze, silver, gold, or platinum for the job; OR, the group may wish to examine the descriptions for each competency and set levels separately for each.
    ▪ Since the NCRC system already has a national database of previously profiled jobs, often the group can locate a similar job – then set their levels based on this research.

• Discuss/Agree on Other Skill Certification(s) – Continue presenting and discussing the other viable certifications, based on your research. (You may have sent these out with the meeting agenda.)
  o Review Closest Matches
    ▪ Review detailed descriptions of the certifications previously identified in your preparation. Pass out printed copies from the web sites, or bring them up on screen.
    ▪ As a group, discuss the skill descriptions looking for those that most closely match the job requirements.

  o Agree on the Certification that Best Fits the Job
    ▪ Usually one clear best match emerges. Help the group settle on one match. The goal is to have everyone confident that we made a good choice regarding the certification systems to be used as a guide for future hiring (and promotions).
    ▪ If the job does not require skills in one specific area, the National Career Readiness Certificate (NCRC) alone may be the best assessment.

  o Set Levels for Technical Skills Certification – If there are multiple levels for the technical certifications [for example NIMS certifications typically have levels 1, 2, and 3] then the group must reach consensus regarding the certification level that best matches the job requirements for an entry-level employee.
• **Discuss Use of Certifications** – Ask the group to consider HOW they intend to use the certification(s) they have selected and to whom they will apply.
  o Most commonly, the certification will be used as a preferred criterion for **new hires** into the position.
  o **IF** these same certification tests (and levels) will be used to test for **promotion**, the company should do some testing of **incumbents** to establish that those currently doing the job actually meet the new standard. If this is done, it involves the following:
    ▪ Identify and schedule incumbent workers to take the certification test/s. (This may involve written and performance tests. You may need to locate certified testers and testing centers where these tests are administered.)
    ▪ Employees complete testing and scores are collected.
    ▪ The team reviews the test results; they discuss/confirm the levels set or **adjust if necessary**. (If a third of the current workforce scores below the level believed to be needed, it’s time to evaluate whether we REALLY need this level, and if so, determine how we’ll get the existing employees up to the required level.) Maybe you don’t need this high of a level!!
  o Companies do not usually need to benchmark their current workers, unless they are looking to use the test results for promotion as well as selection.

  **Reminder:** unless you have profiled the jobs using a **certified job profiler**, the certifications cannot be **required** for hiring or promotion. They can be a **preferred qualification** used as one of many activities in the process but not as a way to disqualify a candidate.

• **Consider Implementation Details** – While most of the following will actually be determined and planned in the next step, it is helpful to set the stage by raising several issues now.
  o **Education Provider(s)** – Following this meeting, your education partners may wish to do some legwork to explore educational options. It will help them if your team is prepared to provide the following input:
    ▪ Your past experience working with the community college (and other community partners)
    ▪ Anyone providing the technical training your employees need or offering the certification/s that you have identified
    ▪ The number of employees you anticipate hiring (over what timeframe)
    ▪ Your willingness to commit to hiring (or to offering paid internships) for some number of individuals
    ▪ Any other manufacturers you are aware of with similar needs who might become partners in order to form a class and sustain a viable program
    ▪ Any staffing agencies you work with to fill vacancies

If you do not yet have an education partner present, you might wish to assign someone from your team to look into this.
Growing Your Skilled Workforce

- **Testing** – It is a good idea to get an initial idea of possible testing costs. These can include:
  - Cost of the test, including any required administration or center fees (if not on-line)
  - Costs associated with pulling people off the line to take the test

  Typically these costs will be built into the education process. However, if your company chooses to test incumbents, then you will cover these costs.

  Sometimes, once the levels have been set companies test incumbents to see if they meet the minimum levels established for the job. If not, they may have been set too high; or some employee development may be required.

- **Candidates** – It is not too early to begin thinking about how you might find a pool of candidates. You might assign someone to research where you have successfully recruited in the past.

- **Timeline/Need** – If not already established, determine (estimate) the number of candidates you will hire and over what time period. This number may be too small for an educational partner to do the necessary work to create the certification training program. But if you can suggest other local companies who may have a similar need you may be able to set up a viable program.

  **NOTE:** These issues do not need to be resolved today but will be the focus of the planning work, which begins in the next step.

- **Review and Wrap-up (Next Steps)**
  - **Next steps** – As you wrap-up the meeting, take a couple minutes to reconnect the team with where you are in the overall process and the next steps along the path to implementing their certification system. At our next meeting, we will begin answering many of these questions so that we can put together a pilot project.
  - **TO DO’s** – It is a good idea to capture any assignments as the meeting progresses. This can be done on a flip chart or by a note-taker. Review these now. Add any additional assignments that the group thinks will be important to move the process forward.
  - **Next Meeting** – If possible set a next meeting when the action items will be reviewed and the next steps will be taken.
Success

It is important that your team has confirmed one or more certifications that are a good match for your position and that they are ready to pilot this. You are READY to move forward when the following are true:

- There is a consensus among the company leaders (and those involved in hiring, training, and supervising these workers) that the certifications and levels are appropriate for the position.
- If necessary or preferred by the company, there is initial agreement to test selected incumbent workers. (This planning will be part of the next step.)
- You have identified a potential training partner and potential sources of qualified candidates.
- There are/will soon be job vacancies and the company is willing to use these certifications as a preferred qualification.
- You understand the ballpark costs, and are prepared to discuss moving forward with a pilot.

Tools

The following tools are helpful to groups doing this validation work:

- Sample Step 3 Meeting Agenda
- PowerPoint: Step 3 Meeting Slides
- PowerPoint: Intro to NCRC
- PowerPoint: Intro to MSSC
- Sample Follow-up Memo
Sample Step 3 Meeting Agenda

This planning work may take place over a couple of meetings. If your situation requires more or less meetings, you will need to adjust this agenda, making sure that all pertinent topics are addressed.

**PURPOSE:** Our goal is to reach consensus on the certification(s) that best match our job and to set any levels necessary.

**AGENDA:**

**Getting Started**
- Welcome & Introductions
- Meeting Purpose and Agenda
- Recap Progress to Date
- Updated Job Description

**Discuss/Agree on Career Readiness Certification and Set Levels**
- Discuss National Career Readiness Certificate (NCRC)
- Set Appropriate Levels

**Discuss/Agree on Other Skill Certification(s)**
- Review Closest Matches
- Agree on Best Match
- Set Levels

**Discuss Use of Certifications**

**Consider Implementation Details**
- Possible Education Partner(s)
- Testing Costs
- Candidates
- Timeline/Need

**Wrap-up**
- Next Steps
- Review Assignments
- Schedule next meeting
PowerPoint: Step 3 Meeting Slides

This PowerPoint show consisting of 8 slides is designed for use in facilitating a Step 3 Certification Matching meeting. After a few slides to set the stage for the session, it then presents step-by-step the work to be completed within the meeting.

Slides can be customized for your particular group or situation.

Detailed facilitation notes in the Notes Section of each slide provide talking points and tips for facilitating the meeting.

PowerPoint: Intro to NCRC

This set of 22 slides provides an overview of the WorkKeys system. The [National Career Readiness Certificate](https://www.erna.org/products/certificates/ncrc/) (NCRC), issued by ACT, is a portable, evidence-based credential that certifies essential skills needed for workplace success.

PowerPoint: Intro to MSSC

This set of 20 slides provides an overview of the Manufacturing Skill Standards Council, and specifically the Certified Production Technician.
Sample Follow-up Memo

Following the Step 3 meeting, you may wish to send a memo similar to the following:

<Meeting Name, Location, Date>
<List of Those Present>

Meeting Notes

Thanks again so much for taking the time to meet today. I appreciated the opportunity to talk with you about certifications and how they can support your efforts to secure qualified <INSERT NAME of POSITION> workers. Following is a summary of our conversation and next steps, based on my notes.

Job Description – Our review uncovered a couple of new skill requirements, which your HR contact will be considering in filling the vacancies.

We agreed that bronze NCRC is appropriate for this position, and that a NIMS 1 in machining is the best match for your technical skill needs.

Here are a few of the implementation details that we touched on briefly at the end of our meeting:

1. We’ll be supporting this effort as your education partner – I’ll be making a contact with several of my colleagues in the next week or two to explore their interest in working together on this.
2. You have indicated that you would be hiring 10-12 people in the next 3-4 months; and that this need is likely to continue or grow in the next year.
3. You have identified a couple of additional companies [insert names here] that may have a similar need; and I will follow-up with them to explore this possibility.
4. We discussed the possibility that you might provide up to 10 paid internships for a minimum of 200 hours at an hourly rate TBD. This pool will be given first consideration when filling your vacancies.

TO DO’s

<table>
<thead>
<tr>
<th>TASK</th>
<th>OWNER</th>
<th>DUE</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revise Job Description per input from meeting – Then forward to Tracy</td>
<td>Bill</td>
<td>3/18</td>
<td></td>
</tr>
<tr>
<td>Reach out to education colleagues, invite them to next meeting with this group</td>
<td>Tracy</td>
<td>4/5</td>
<td></td>
</tr>
<tr>
<td>Follow-up with other manufacturers to explore interest in joining this certification pilot</td>
<td>Tracy</td>
<td>4/5</td>
<td></td>
</tr>
<tr>
<td>Discuss internship commitment, possible pay rate with management team</td>
<td>Virginia</td>
<td>4/5</td>
<td></td>
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</tbody>
</table>

Please don’t hesitate to call or email if I omitted anything from our conversation today or if you have questions or would like additional information. We look forward to continuing the conversation and moving forward to developing and piloting a couple strategies to address current and future workforce challenges.

Our next meeting is set for April 5, 10:00 – 11:30 at your location (TBD).

Regards,
Step 4: Develop Pilot Plan (Beta)

- Analyze Company Skill Needs
- Match Job Certification & Skill Levels
- Institutionalize (Deploy) Certification
- Develop Pilot Plan (Beta)

Improve and Sustain
Overview

By now, your company is deeply invested. You have reached agreement on the desired certification and levels; and your implementation team has started thinking about educational partnerships, testing, and where candidates might be found. NOW, you need to work out the details and get something going.

As with any new process, you’ll probably want to “test” or PILOT the approach in a limited environment. Perhaps you will hire a few candidates with the certification/s to see how they perform in the workplace. Does their performance exceed that of previous new hires? Can you collect data that documents this?

NOTE: Usually starting with new hires is more successful – This is lower cost for the company, because you may be able to get public dollars to help pay for the training and testing.

This step is all about facilitating commitments, establishing action plans:

1. You will need commitments from the community college and any other educational partners about what they will do to provide the training and a pool of certified candidates.
2. The community college and any other educational partner(s) will also want commitments from you as the manufacturer so that they can operate a viable training program that leads to jobs for their students.
3. And, together you must iron-out all the details about how this pilot of the program will work.

Finally, the PILOT program must be implemented according to the plans and commitments made.

Preparation

Your role at this point is to choreograph and facilitate a couple of meetings that bring together participants from your company (and any other companies you might chose to partner with), the community college, and the any other educational providers (if appropriate) and community partners (if needed) to finalize commitments and action plans. Here are some preparation steps you should take:

- Meet with the key education and community partners, if appropriate, to relay to them your company’s needs, desires, and commitment to partnering. (See TOOLS: College and Community Partner Discussion Checklist for a list of things to discuss.) Invite any partner representatives to the next meeting with your company.

- As part of your homework, you should learn where various certification assessments are already offered in your area. (Your college partners can help you with this.) Employers who accept a certification as “preferred” criteria for their positions need to know where to refer applicants for training and testing. You should bring a list of those locations to your next meeting. (The web sites for each certification provide a list of approved testing centers.) If there are no certification testing centers already operational in your community, begin researching what’s required to set them up. (Again, you college partner might take the lead on this.)
Schedule a meeting (or two meetings, 2-3 weeks apart) to plan the rollout of the pilot. Be sure to include the following:

- Key company personnel (Management, HR, Training) – likely the team you’ve been working with, perhaps with one or two additions.
- Similar personnel from other companies that are possible partners (if the pilot requires greater participation/numbers in order to be viable)
- Appropriate individuals authorized to represent the college and make commitments regarding the pilot program.
- Representatives of any other community partners.

Prepare and send the agenda/s prior to each of the meetings. (See TOOLS: Sample Meeting Agendas)

Ensure meeting results are documented and distributed following each meeting.

Facilitation

Keep these tips and techniques in mind as you facilitate these meetings. We will assume two meetings are held; keep in mind that some groups may be able to do this work in ONE meeting; some may require more than two meetings.

Meeting 1 (at Company Location)

- Welcome everyone – Introduce any new players in the room; Review the meeting purpose and agenda
- Set the Context – It’s generally helpful to paint the BIG PICTURE (the vision) each time you begin a meeting, not only to keep everyone focused but also to bring new players up-to-speed with the group. Be sure to:
  - Provide an overview of the previous conversations – Likely you will have documented much of this in notes from previous meetings.
  - Answer any questions - provide clarifications as needed.
- Clarify Expectations and Commitments – Since success depends on clear expectations and creating something that works for everyone, you need to be sure that all the cards are laid on the table during this meeting. Throughout this section, look for points of potential collaboration, ways all parties can leverage resources.
  - Manufacturing Partner(s): Discuss your company requirements and commitments to the program – along with those of any partner companies. Obviously, this discussion may toggle back-and-forth as the possible partners become aware of each other’s needs and seek to reach workable agreements. Companies often commit to:
    - Provide input to the curriculum – The curriculum is much stronger when manufacturers provide guidance, or in some cases offer to teach classes or provide guest presentations.
    - Participate in student interviews – When the employer gets involved up-front in screening those applying to the training program, it sets a tone for the students that they are preparing for a possible job, and helps ensure that the training investment will lead to graduates who are more likely to be hired.
    - Offer plant tours for students in the program so that their learning experience is enhanced by seeing how their new knowledge and skills will be applicable on-the-job. This can be highly motivating to students, as it allows them to visualize the goal they are working toward.
    - Provide paid internships – It is great to give students some real-world experience
during their education process. If the company can provide paid internships these can be a great perk for students; and it allows the company to see potential employees in action.

- **Commit to interview completers** – Knowing that all graduates will, at a minimum, get a job interview is an incentive for students to apply themselves and complete their studies.

  - Community College: Explain the college’s requirements and parameters in order for the partnership to work. This may include things like:
    - Explaining existing training curriculum – Explain how industry certifications may already be part of the academic framework of the program, and if there is certification already taking place with students
    - Options (& possible timeline) to adjust the curriculum
    - Introduce possible career pathway – Show how the specific certification under discussion fits within a larger career pathway with additional education opportunities that an employee can pursue to keep growing their career.
    - Minimum numbers of students
    - Frequency and timing for offering the program
    - Testing
    - Test Preparation – Might consider developing some certification preparation classes or workshops; the company may have employees who want to sit for the exam but need assistance in preparing for test taking.
    - Costs and possible funding sources
    - Expectations for the manufacturing partner/s, such as referrals, helping to convene employers, support for job placement and retention, etc.

- Discuss the **Implementation Process and Timeline** – Introduce the core areas that need to be ironed-out and begin the process of exploring each:
  - **Curriculum:**
    - Review the possible curriculum outline if not done above – Discuss match with company needs and certification requirements.
    - Discuss possible steps, timeline, and costs associated with preparing the educational program for students. (Share possible options to help pay for the training.)
    - Agree on next steps and assignments to finalize the curriculum
  - **Testing:**
    - Most certifications require a controlled testing environment where students complete on-line exams and/or performance tests where the outcome/product is evaluated by a third party. You will need to identify how testing for the desired certification/s will be accomplished.
      - Some certifications can be attained at the workplace. Mid-size and larger companies may choose to establish a testing and training center on site and will assess potential new hires as well as incumbent workers seeking a promotion.
      - Many employers chose to purchase services and assessments through an academic partner; they may arrange testing access on an as-needed basis at the educational site or a one-stop career center.
    - The best approach, costs, and all testing parameters (timeframes) need to be identified and documented.
    - Agree on next steps and assignments to finalize testing.
Students (Job Candidates):

- Creating a pool of appropriate students (or potential job candidates) is key to the success of this venture. The group should discuss ways they will market this opportunity and whether these efforts have a good chance of producing the necessary numbers to make the program work.

- Discuss where qualified candidates for the job (and/or the training program) might be found. Here are some common approaches:

  1. **Recent graduates from the community college or other local education providers** involved in training related to the identified certification/s, i.e. NCRC, NIMS. You should find out if there is a training provider that has the certifications embedded in their program and identify the training/testing cycle. Then inform current students about the opportunity. Allow the company to talk with the students, and perhaps interview them prior to or immediately after graduation.

  2. **Individuals with industry experience** and who are confident that they can pass the assessments can be given the opportunity to take the tests. If they do not pass there should be a process for referral to a remediation option or possibly a short-term training program.

  3. **Veterans** with skills that are similar to those required by the company may be offered the chance to take the assessments and then offered remediation/brush-up training before they test again.

  4. **Random applicants** for the job (but who lack the certifications) may be encouraged to contact the education/assessment provider to take the tests to see how they do.

**REMEMBER:** Unless the jobs have been professionally profiled, a company cannot deny an individual entrance into the pool of candidates if they meet the other requirements for the job. However, individuals with certifications might rank a little higher in the pool.

  5. **Individuals currently participating in a work readiness program** with a community-based organization or a program at an educational institution could be good candidates. A good relationship with the director of this program and clear understanding of the program goals and outcomes is critical to this partnership being a viable source.

  6. **Clients of the local One-Stop Center** may be good candidates. Talk with the One Stops in your area about potential participants to see if they have clients they might funnel into the program.

- Companies can be part of the recruitment process. They can allow their name to be used in announcing the program and they can make referrals. If someone applies directly to the company but does not meet the criteria, the company can suggest that they consider pursuing the certification and can provide information on how to enroll in the training program.

- Often participating companies can help interview applicants to the training program so they know who is involved and can stay connected with the students during the training program.

- Agree on next steps and assignments.
Employment:

- Since employment is the ultimate goal, it is a good idea to begin now to map how the training process will lead into the employment process.
- This is where some of the discussions about employer commitment to tours, internships, and interviews should be documented and formalized.
- When would students complete the training? The certification? And, when/where might the interviews take place?
- What is the interview and selection process the company(ies) will follow?
- Will the company offer a wage incentive for individuals with certification?
  - If the company is paying the same hourly rate to new hires without the certification, it may be less of an incentive to individuals to seek out the certifications.
  - Companies may be more open to paying a wage differential once they have experienced hiring and onboarding certified workers; and they have been able to document some of the cost savings and productivity improvements. (There are some good examples of companies that have done this in the Employer Spotlight series on the MI website.)

**NOTE:** An HR question that frequently surfaces is around the legality of using these certifications for hiring. Point out that certifications are one tool in the selection process. It is best to indicate that a specific certification is preferred, not required. If an applicant has the certification, they may be ahead of someone who does not; but not having it does not disqualify any candidate.

- Agree on any next steps and assignments related to the employment process.

**Wrap-up the Meeting**

- **Summarize & Review Assignments** – It will be important throughout this meeting that commitments and assignments are documented. This is your opportunity to summarize and review each of these in order to lock-it-in. It may be helpful to present these in three sections: (Each of these could be a flip chart that you added to throughout the meeting.)
  - College and other Educational Partner Commitments – Things the college and other education partners have promised throughout the meeting that they will do. (Not specific assignments – captured below under TO DO’s – but the general commitments made.)
  - Company Commitments – Same as above, but for the manufacturing company or companies if multiple companies are partnering.
  - TO DO’s – All actions committed to in order to advance the planning. These should include a brief description of the task, owner, and due date.

- **Schedule next meeting** – It is possible, but unlikely, that all the necessary planning was completed in this meeting. Be sure that a second meeting is on everyone’s calendar in the near future. (Timing will depend on circumstances, and needs to allow enough space for assignments to be completed, but soon enough to keep the project moving forward and on schedule to meet your personnel needs. Two to three weeks is probably ideal.)
Meeting 2 (perhaps at college location)

• If the college can host the second planning meeting on campus, it provides a nice opportunity for them to showcase their facility – you may wish to combine the meeting with a tour of the lab where the training or testing will actually take place. In this case, someone from the college should welcome everyone and set the tone for the meeting before you take over as facilitator. Introduce any new players in the room; Review the meeting purpose and agenda.

• Report on Assignments – The success of this meeting depends on everyone having faithfully carried out their between meeting assignments. For this reason, you need to be sure that good minutes are sent out at the end of the prior meeting; and you may even want to send one or more reminders prior to the follow-up meeting. The information collected and the work completed will pave the way for the detailed planning that needs to happen in this session. Depending on the nature of the tasks undertaken you might follow one of two approaches:
  o Pull out the TO DO list and proceed through each assignment in the order listed in the minutes. The downside of this, is that you may be pulled-into discussions prematurely simply because of the lists organization.
  o Alternatively, you might keep this to very brief reports (“Yes, I did that!” “I’ve got it and can share today”) and then save the actual review of the work or the full input until the appropriate point in the agenda where that topic is being discussed.

• Schedule Implementation Activities –These topics were all addressed during the initial meeting. Your goal now is to circle-back to each area, review any homework done, and make final decisions as needed to firm up the pilot plan.
  o Curriculum:
    ▪ Review the curriculum outline as refined by the college; get confirmation from the company (or companies if you have partners) that the proposed curriculum aligns with the needs.
    ▪ Finalize the training timeline. Confirm training schedule, days, evenings, hours per day, hours per week ending date.
    ▪ Review the costs; agree on how costs will be covered.
  
  o Testing:
    ▪ Confirm how the testing for the desired certification/s will be accomplished. Not all colleges will be able to set up testing sites that are available “on demand.” This could also vary depending on which certifications are selected, because some have more stringent testing requirements than others do. This needs to be carefully explored as part of the research and discussion.
    ▪ Finalize the testing timeline.
    ▪ Review the costs; agree on how the costs will be covered. If possible, include the testing costs in the fees for the class so all students have paid for testing prior to completion.

  o Students:
    ▪ Review and commit to the plan to attract a pool of appropriate students. Be sure the college, any other education partners (if involved), and the business partner(s) are committed to follow-through with their commitments. Getting appropriate candidates into the program is critical.
    ▪ Confirm the required numbers to make the program work and discuss options to deal with lower than anticipated enrollment.

  o Training/Employment Process:
    ▪ Ideally, there should be a seamless process all the way from an initial contact with a potential candidate through to their regular employment with the manufacturing
company. Work out and document these details as described below.

- **Clarify and document the intake process** that all referrals go through in order to be selected for the training program.
  - Where will referrals come from?
  - Will the *National Career Readiness Certificate* (NCRC) be a requirement to enroll in the training? (or a requirement for completing the training program?)
  - Will background checks be required for these employees? If so, should these be required before allowing someone into the training?
  - Is drug testing required? When will it be done? (Before training or before employment?)
  - Will the employer/s interview the candidates before they start the training program or when they are close to completion?

- **Clarify the employment process.** Companies follow a variety of practices when selecting and onboarding new hires. Identify the best process for this pilot. Some elements that may be included:
  - **Resumes** – Do you want to collect and review these prior to a student entering training, or at some later point.
  - **Employment applications** – when would these be needed?
  - Is there any required company testing *(for example drug screening)* or background check? When should these occur?
  - If providing a paid internship, what is the intern selection process? How does that lead to employment?
  - Will you (or any of the partner companies) use temporary employment through a temp agency with the option to hire over time?

- **Confirm (and schedule) company involvement** throughout the educational process, including:
  - Guest teaching engagements
  - Company tours
  - Internships
  - Employment interviews

- It is a good idea to **identify any employee performance metrics** the company will monitor once the individual is hired. These metrics will be collected and used to evaluate the success of the pilot. (For example: retention, reduced OJT time, scrap rate, task completion, etc.)
  - You might ask: Do we have baselines for the metric/s we want to track; or can we get them before we pilot this approach?
  - Asking these questions NOW helps ensure the project outcomes can be clearly documented.

• **Wrap-up the Meeting**
  - **Summarize Decisions or Agreements** – Throughout the meeting be sure all key elements of the implementation plan are captured.
  - **Review Assignments/Next Steps** – End with a clear review of commitments to ensure everyone leaves the meeting ready to implement the plan.
    - It is likely that you will not formally meet again until the pilot is complete; however, you should establish one or more check-in meetings or conference calls with this group to monitor the pilot and ensure everything is working as planned.
    - Certainly, you will continue to coordinate things from the sidelines over the coming months as the pilot is implemented.
Growing Your Skilled Workforce

NOTE: Be sure to send out clear documentation following this meeting. Follow-up phone calls and emails to the group or to individuals will be your primary mechanism to ensure the project stays on track.

Conduct the Certification PILOT

Having facilitated the planning meetings, obtained the necessary commitments, and documented the plan for conducting the pilot program, your role now shifts to that of a coach or a monitor of the project. Ideally, someone from the college will be your partner in managing the project. If not, it may fall to you to monitor the commitments and tasks necessary to implement the pilot program.

- Ensure there is ongoing communication between your company, referral points, and assessment sites. You may find yourself sending follow-up emails, making phone calls, and updating the Gantt chart for the project as necessary.
- Review the process for securing candidates and screening for enrollment.
  - You, or someone from your company, may want to participate in student interviews as part of the hiring process.
  - Ensure the quality of candidates is acceptable and that you are getting quality employees at the end.
  - Provide feedback to the college as appropriate.
- Check that your company (and any partner companies) are maintaining their commitments to provide plant tours, deliver classroom presentations, etc.
- Track internship placements

Additionally, you’ll want to ensure your company is monitoring the performance of the certified individuals you hire and comparing this to your baseline so that you will be able to substantiate the success of the pilot.

- Agree on the metrics you company wishes to use to evaluate the pilot:
  - OJT: For example, if a new hire typically participates in 40 hours of OJT before they are able to work on their own, monitor to see if it is less with these candidates.
  - Scrap Rate: If the department typically has a scrap rate, monitor to see if it is reduced once the new hire is working independently.
  - Productivity: Hopefully the new hires achieve higher productivity, more quickly than past new hires.
  - Quality: Do these new hires demonstrate improved quality (or have they at least maintained the expected level of quality)?
  - Safety: Metrics around safety which could also be considered
  - Retention: If new hire retention after 30 days improves from 40% to 80%, this has a huge financial impact, since the cost of a new hire can easily range from $5,000 to $10,000.
- Gather and document the BASELINE data for all metrics you have decided to track.
- Assign responsibilities for monitoring, aggregating, analyzing, and reporting the data.
- See Calculating Value and ROI for Workforce Certification handout in the Step 1 TOOLS section for additional guidance in establishing metrics to evaluate the success of workforce certification.

Use the above data as you near the end of the pilot and begin to look toward formalizing and institutionalizing your new hiring approach.
Success

The ultimate success of this step is that your pilot program is a success. These are indications that you are on track to be successful:

- All the key players have come together (for the required number of planning sessions) and have actively engaged with each other to build the plan
- The plans are clear, including WHAT, WHO, WHEN; These plans have been well-documented; and everyone involved is committed to the plan
- YOU are committed to continuing to monitor and support those involved throughout the pilot – you are not just saying “Good Luck!” as you head off for other assignments.
- The company has agreed to measure and evaluate the impact of hiring certified workers.
- The college is committed, views this as a sustainable model to be implemented with other companies, and is willing to do what it takes to make this a success.

Tools

- College and Community Partner Discussion Checklist
- Sample Meeting Agenda – Pilot Planning Meeting 1
- Sample Meeting Agenda – Pilot Planning Meeting 2
- PowerPoint: Step 4 Meeting Slides
- Sample Training and Hiring Process
- Sample Application Packet
College and Community Partner Discussion Checklist

By this point in the process you need to begin involving your local college and any other education partner(s). You may have already involved a college partner – perhaps they were even part of your Step 3 meeting. If not, you will need their involvement as you move into Step 4. Here is a list of things the college and community partners need to talk through:

- Identify all the possible partners
- All partners need to understand the manufacturer’s needs, desires, and commitment to partnering.
  - Describe the Job and the certification(s) selected
  - Number of positions to fill and time period
  - Initial commitments to partnering

- Clarify the college’s credentialing status. Do they have someone certified to deliver the desired credentials? They may want to get someone on the faculty certified, or recruit new instructors who already have the required certifications. **NOTE:** The NIMS website has a list of colleges that are certified to offer NIMS if you wish to research this.

- Does the existing curriculum support the chosen certification? What is required to modify or expand the curriculum?

- Would this certification fit within an existing career pathway? (If not, is there a way that it could?)

- What is the **minimum number of participants** required by the college to justify the effort? (NOTE: If this number is larger than your company’s needs, you may be able to pool needs from other similar companies in order to increase the number of students.)

- Who is the contact (from each partner involved) who will work together with you to plan the pilot. (They will want to attend the next meeting. You may need to spend some time with this individual to ensure they are fully up-to-speed and ready to participate in the employer meeting.)

- What are the **funding options** for students – Some can get special loans or grants; Some funding is periodically available for special programs. (You may want to explore options with the college’s financial aid office. Sometimes financial aid such as Pell grants are available or WIA funding.)

- There may be some “selling” required at this point. Explain the bigger picture and **benefits of this partnership** for all partners in the community.
Sample Meeting Agenda – Pilot Planning Meeting 1

This planning work may take place over a couple of meetings. If your situation requires more or less meetings, you will need to adjust this agenda, making sure that all pertinent topics are addressed.

**PURPOSE:** Our goal is to reach necessary agreements to be able to pilot selected industry certifications we have been discussing. This will require commitments from:

- **<Insert name of Company or companies involved>** – How you will support the training and provide job opportunities for graduates.
- **<Insert name of College or Department>** – What you will do to provide the training and a pool of certified candidates.

This will then allow us to move forward with details about how the pilot program will work.

**AGENDA:**
Welcome, Introductions, Meeting Purpose and Agenda

Set the Context
- Provide overview previous conversations
- Answer and Questions - provide clarifications

Discuss/Clarify Expectations and Commitment/s
- Education Partner
- Manufacturing Partner(s)

Discuss Implementation Process and Timeline
- Curriculum
- Testing
- Students
- Employment

Wrap-up
- Summarize and Review Assignments
- Schedule next meeting
Sample Meeting Agenda – Pilot Planning Meeting 2

This planning work may take place over a couple of meetings. If your situation requires more or less meetings, you will need to adjust this agenda, making sure that all pertinent topics are addressed.

**NOTE:** It may be nice to hold the second meeting at the college’s facility; that way you may incorporate a tour of the training lab.

**PURPOSE:** Today we’ll confirm and finalize all necessary agreements and finalize our plan to pilot the certification system we have been discussing.

**AGENDA:**

- Welcome, Review Agenda
- Report on assignments
- Schedule implementation activities
  
  **Curriculum:**
  Finalize curriculum (including company involvement)
  Finalize the training timeline and budget

  **Testing:**
  Confirm how the testing for the desired certification/s will be accomplished
  Finalize the testing timeline and budget

  **Students:**
  Review and commit to the plan to attract a pool of appropriate students
  Confirm the required numbers (and fallback plan)

  **Employment:**
  Finalize how the training process leads to the employment process.
  Confirm (and schedule) company involvement throughout the educational process

- Wrap-up
  Summarize Decisions or Agreements
  Review Assignments/Next Steps
This PowerPoint show has two sections designed for use in facilitating sessions to plan the pilot (or Beta Test) of your new certification system.

1. The first section guides the group through the work to be done in the initial meeting.
2. Use the second set of slides, which begins on slide 9, to guide the group through the work you will do during the follow-up session.

After a few slides to set the stage for the session, it presents step-by-step the work to be completed within the meeting. Customize these slides for your group/situation.

Detailed facilitation notes in the Notes Section of each slide provide talking points and tips for facilitating the meeting.
Sample: Training and Hiring Process

A chart similar to the one shown below is a useful way to outline the training and hiring process, including the decision and testing points along the way. Modify this to match the agreements reached during the planning process.
This sample document is included as an illustration of the kind of packet that might be pulled together to give to job applicants.

Typically, this would be developed jointly by the College and the Company.

Click on the photo to access a copy of this PowerPoint.

Sections you will find in this sample Applicant Packet:

- Overview
- Requirements
- Program Content
- Program Fee:
- Steps to Apply
- Projected Class Schedule
- Program Contacts
- Payment and Funding Option
- Certification Overviews
  - ACT/National Career Readiness Certificate
  - National Institute of Metal Working Skills, (NIMS) Certificate
Step 5: Institutionalize (Deploy) Certification

1. **Analyze Company Skill Needs**
2. **Develop Pilot Plan (Beta)**
3. **Match Job Certification & Skill Levels**
4. **Institutionalize (Deploy) Certification**

**Improve and Sustain**
Overview

This step is all about turning what was (hopefully) a very successful pilot – along with any of the lessons learned – into an ongoing process that is sustainable over time. It may also mean expanding the focus (or reach) of the initial pilot to the next level.

By this time, candidates have completed the training program and their internship experience if appropriate; and ideally they will soon be hired, or have already been on-the-job for a short time. You now reconvene the group to review the pilot process and outcomes and to identify next steps. Since this step may require more than one meeting, be sure to begin early enough so that you are ready to launch the next cohort in time to meet your company’s ongoing workforce needs.

Preparation

Clearly, implementing the pilot program (see step 4) and this step overlap. In many ways, step 5 is simply the logical continuation of your efforts. Still, here are some preparation steps you should take:

- **Review and summarize the project** to date. This might take the form of a PowerPoint slide show; or you may choose to draft a formal report.
  - Pull together any data collected to date. (For example: number of applicants, students trained, program retention, percentage hired, etc.)
  - Collect and review student & employer evaluation forms.
  - Review all your notes from classroom visits and conversations with educators, your recruiters, trainers, and supervisors.
  - Meet with students and discuss their experiences and their expectations for employment and continued education.

- Schedule a meeting with all key players and send an agenda (See TOOLS: Sample Meeting Agenda). Be sure to invite:
  - All internal partners and past team members (HR personnel, Supervisors, Trainers, etc.)
  - College partners (Program Coordinator, Instructors, Recruiters, etc.) and any other education partner/s involved.
  - Any referral sources for candidates
  - Any additional community partners that supported the project through referrals, supportive services, etc.
Facilitation

Keep these tips and techniques in mind as you meet with the group during this step. *We will assume one meeting; but keep in mind that some groups may require additional meetings.*

- **Get the Meeting Started:**
  - Welcome everyone – Introduce any new players in the room.
  - Review purpose and agenda for the meeting (See TOOLS: Sample Step 5 Meeting Agenda)

> Depending on your company’s meeting culture and meeting space, it may be useful to have some slides on-screen to guide the session, or you could use a handout or flip-chart. (See Step 5 Meeting Slides in TOOLS Section.)

- **Review and Discuss Progress**
  - Present your project recap in either PowerPoint slides or report format. When well-done this provides a solid foundation for the discussion that follows. If it is lengthy, you may wish to break it into sections and discuss each area as you proceed. Areas to cover include:
    - Student recruitment and screening
    - Training and Testing
    - Employment (might include internships, hiring process, orientation, and any OJT)
    - Overall results or outcomes to date – Include any metrics you have had access to and any anecdotal information you’ve gleaned.
  - Discuss above information with all participants.
    - Identify *WHAT WORKED* – Things we would like to continue
    - Identify possible *CHANGES* and improvements based on feedback.
  - Review impact metrics tracked by the employer/s involved in the pilot to assess impact and value. (See Step 4 and tools provided there.) It is early, so only minimal data may be available; but it is important to keep the focus on collecting impact data.
    - Ensure monitoring and gathering is continuing. (Sometimes the person initially doing this gets promoted or leaves the company.)
    - Confirm the process for collecting and reporting the data.
    - Identify the timeline for reviewing this information.
    - Document any TO DO’s related to collecting, analyzing, and reporting data.
• **Confirm Ongoing Commitments.** This will be the basis for long-term success.
  • Secure a commitment from the company(ies) involved in the pilot to use certifications as their preferred criteria for hiring and to continue to use this (or a modified) training/internship/hiring process to fill their vacancies.
    o Determine your future workforce needs/timeline. Will you be in a position to continue to offer internships/employment to the next class?
      ▪ If it will be some time before additional employees are needed, the college may need to suspend the training program until a future date.
      ▪ Another option is to identify additional companies to participate going forward. Ask the group to help identify companies that might have similar needs.
    o Provide company testimonial/s that your educational partner and any referral sources can share to attract new candidates.
  
• Discuss the college’s commitment to continue to offer this model program on an ongoing basis, based on demand.
  o It may not run continuously; but the college may be willing to deliver the program as needed, based on company demand. Having this commitment allows everyone to comfortably continue the program, and recruit other companies for future classes.
  o Discuss plans around positioning this certification as part of a larger career pathway that the college will offer to students seeking to improve their employability. (This may also open the door to discuss certifications for other positions within your company.)

• **Make a Decision** to continue the program. If you have commitments from all parties, then move the group into planning the next round. If the decision to continue cannot be made at this time, set a future date when you will re-assess the situation.

• **Plan Implementation Details** – If all parties are committed to moving forward, take the necessary steps to establish long-term success and sustainability, including:
  • **Identify Process Owners** – Each core process needs an owner to ensure it is sustained over time. Suggested process categories and owners are:

<table>
<thead>
<tr>
<th>Student Recruitment</th>
<th>Joint ownership by company HR and CC recruiter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education/Testing</td>
<td>CC Program Coordinator</td>
</tr>
<tr>
<td>Curriculum</td>
<td>Lead Instructor</td>
</tr>
<tr>
<td>Internship (if applicable)</td>
<td>Company HR</td>
</tr>
<tr>
<td>Hiring</td>
<td>Company HR</td>
</tr>
<tr>
<td>Program Outcome Metrics</td>
<td>Company Manager responsible for employee group</td>
</tr>
</tbody>
</table>

• **Document Processes** – Now that everyone has been through the process once, it is important to collect and put down on paper all the necessary details to successfully repeat the process. Usually each process owner takes the lead to ensure this happens for his/her area of responsibility.

• **Agree on future actions** – During the above discussion where you debriefed each of the core functions of the pilot you may have identified things that need to change. As always, it is best if each action item is documented, and has a clear owner and due date.

• Wrap-up the Meeting – Bring the meeting to a close by recapping the decisions made and all action items as agreed during the meeting. If appropriate, schedule a follow-up meeting to continue the planning, or to check-in on progress.
Once plans to formalize the training and certification process are established, it is common to move into a maintenance mode where the group checks-in with each other on a less frequent basis, such as quarterly or even semi-annually.

Success

You will know your new workforce training and certification process has been ‘institutionalized’ when:

- You have documented quantifiable benefits to the program; and you are willing to promote the program and workforce certifications with other employers.
- You agree to continue to use the certification(s) as preferred criteria for hiring.
- Your team expresses their desire to continue to use this (or a modified) training/internship/hiring process to fill their vacancies.
- The educational partner agrees to continue to make this training program available to students and to meet future needs.
- The college decides to make this new curriculum part of a larger education pathway.
- Everything continues successfully into the second and third cycles through the processes.

Tools

- Sample Step 5 Meeting Agenda
- PowerPoint: Step 5 Meeting Slides
Sample Step 5 Meeting Agenda

This planning work may take place over multiple meetings. You may need to adjust this agenda, making sure that all pertinent topics are addressed.

PURPOSE: Our goal is to evaluate the pilot and plan for the continuation of this certification process.

AGENDA:
Getting Started
  Welcome & Introductions
  Meeting Purpose and Agenda

Review and Discuss Progress
  Project Recap
  What Worked/What do we Change?
  Impact Metrics

Confirm Ongoing Commitments
  Employer Partner(s)
  College and Other Education Partner(s)
  Community Partners
  Decision to Continue

Plan Continuation Details
  Process Owners
  Document Processes
  Future Actions

Wrap-up
  Next Steps
  Review Assignments
  Schedule next meeting
This PowerPoint show consisting of nine slides is designed for use in a facilitating a meeting focused on transitioning from the Pilot to ongoing maintenance of the certification process. After a few slides to set the stage for the session, it then presents step-by-step the work to be completed within the meeting.

Slides can be customized for your particular group or situation.

Detailed facilitation notes in the Notes Section of each slide provide talking points and tips for facilitating the meeting.
Step 6: Improve and Sustain

- Analyze Company Skill Needs
- Develop Pilot Plan (Beta)
- Match Job Certification & Skill Levels
- Institutionalize (Deploy) Certification

Improve and Sustain
Overview
As you’re aware, industry is constantly changing as manufacturers respond to marketplace demands: products sunset; new products emerge; evolving technology and new processes fundamentally alter the nature of the work. The skills you require from your employees change too. For all these reasons it is important to regularly revisit what has been put in place in order to sustain and improve it.

Preparation
Like the previous step, this step is a natural continuation of the partnership and positive momentum that you have built-up over the previous months. Take these actions to prepare for your quarterly or semi-annual check-in:

- Send the meeting reminder and agenda to the full group of partners involved in the certification program. By now you’ll have that distribution list well documented; but be aware of the need to add/remove players as things shift both within your company, and externally. (See Tools: Sample Meeting Agenda)

- Touch base with your manufacturing staff to remind them of the data needed regarding the status of the current workforce as well as any projections or potential changes that will affect future needs.

Facilitation
Keep these tips and techniques in mind as you facilitate the group at this check-in meeting.

- Begin the meeting by welcoming and asking everyone to introduce themselves. Even though the group has likely met many times, there are always members coming and going; and members may forget names and specific roles of those present. Review the meeting purpose and agenda. (See TOOLS: Sample Meeting Agenda)

- **Review the current certification process – Progress Updates** – You might start by providing updates regarding any assignments you or others present have completed since the last meeting. While these may be small details, they are likely important to maintaining the process. Thank those who have completed tasks. Be sure to recognize those present for their contributions on behalf of the program.

- **Confirm the certification process is still working** for the company. Your probing with the following questions may reveal things that have not yet been verbalized:
  - Does the training content and certification still match the needs?
  - Has the product itself changed; or, have new products been added?
  - Has the production process changed? Are there new materials, tools, or technologies?
  - As a result, is there a change in what is required of employees?
  - Does anything need to be added to the curriculum?
• **Review the impact metrics.** Use these regular check-ins as an opportunity to continue to monitor the outcome data you have collected.
  
  o What does the data tell us about our successes? Use success data to underscore the value certification is providing. How are we sharing this success story with others?
  o Does the data indicate any areas for improvement? For example, if the retention metrics are poor and all those great people recently hired are gone, you may want to ask: What happened? If they went down the street to the employer for fifty cents an hour and benefits, this may open the door for a discussion about what can be done? How much is it costing the company to save that 50 cents?
  o Is there a continued reduction in OJT time? Or, do we need to do more than we initially projected?

• **Discuss future plans.** Your company (or partner companies) may be able to make some projections regarding employment needs over the next 6-12 months or beyond. Many companies struggle with making these estimates. So, these questions can help the team explore coming changes that may impact workforce needs:
  
  o Will production continue indefinitely or is the product being sunset?
  o Have other positions emerged that require new/different skill sets? (For example, does the company now need welders?) Some companies are deciding to bring back work that was previously off-shored. Will any new positions be created? (This may be an opportunity to repeat steps 2-5, focusing on this job.)
  o Do we know how many people will be needed and when?
  o Can we begin now to develop a training program and identify a certification to address these needs?
  o Revisit the idea of career pathways – Are there other positions that need to be filled (or next steps for these employees) that we may be able to begin preparing them for now?

• **Wrap-up the meeting** by reviewing any assignments identified during the above discussions. If possible, schedule the next meeting, before you leave so that you will continue the discipline of these regular check-ins.

**Success**

The following are ongoing signs that the certification process you established over months of diligent work is healthy and well:

- The planned review meetings have taken place; they are well attended by all partners.
- The data has been collected and analyzed; the data validates the value of the investment in the program (and sometimes reveals improvement opportunities).
- All parties express an ongoing commitment to continue.
- Additional opportunities may have surfaced for certification and training (and plans to address these are being initiated).

**Tools**

Sample Step 6 Meeting Agenda
Success Checklist (compiled for all six steps)
Sample Step 6 Meeting Agenda

Typically, this will be a quarterly or semi-annual check-in between the manufacturing and educational partners. You may need to adjust this agenda to ensure that all topics pertinent to this company (or carried forward from previous reviews are addressed).

**PURPOSE:** Our goal is to review the status of the certification process and to consider any opportunities to improve what we are doing to better meet current (or future) needs.

**AGENDA:**

**Getting Started**
- Welcome & Introductions
- Meeting Purpose and Agenda

**Review Current Certification Process**
- Provide updates re: assignments
- Confirm process is still working

**Review Impact Metrics**

**Discuss Future Plans**
- Ongoing needs
- New positions/needs

**Wrap-up**
- Review Assignments
- Schedule next meeting
Success Checklist – Compiled for ALL Six Steps

Success with Step 1: Decision: Is Certification Right for US?
It is important that a company has settled in their own minds that certification might be right for them BEFORE you invest the time and energy to pursue the additional steps outlined in this Toolkit. You’ll know the company is READY to move on to the next step when most of the following are true:

- They express a desire to be more certain of the applicant’s skills in order to make better hiring decisions
- Someone has made a preliminary determination that there may be a certification that matches with their skills needs.
- They agree to do an initial analysis of one or more jobs to determine if there might be a match with one of the NAM-endorsed certifications.
- OR, they invite you back to talk with a larger group to see if there is consensus that certifications might be a good fit for them.

Success with Step 2: Analyze Company Skill Needs
You will know you have completed the necessary work and the company is READY to move on to the next step when most of the following are true:

- You have confirmation that the job description accurately describes the job and skills required.
- The group has begun to think about certifications that may match the skills required.
- They continue to express interest in moving forward with implementing a workforce certification for at least one job.

Success with Step 3: Confirm Certification Match and Required Levels
It is important that a company has confirmed the certification(s) are a match for them and that they are ready to pilot this. You will know the company is READY to move forward when the following are true:

- There is a consensus among the company leaders (and SME’s) that the certifications and levels are appropriate for the position.
- If necessary or preferred by the company, there is initial agreement to test selected incumbent workers. (This planning will be part of the next step.)
- You have identified a potential training partner and potential sources of qualified candidates.
- There are/will soon be job vacancies and the company is willing to use these certifications as a preferred qualification.
- They understand the ballpark costs, and are prepared to discuss moving forward with a pilot.
Success with Step 4: Develop Pilot Plan (Beta)

☐ All the key players have come together (for the required number of planning sessions) and have actively engaged with each other to build the plan
☐ The plans are clear, including WHAT, WHO, WHEN; These plans have been well-documented; and everyone involved is committed to the plan
☐ YOU are committed to continuing to monitor and support those involved throughout the pilot – you are not just saying “Good Luck!” as you head off for other assignments.
☐ The company has agreed to measure and evaluate the impact of hiring certified workers.
☐ The college is committed, views this as a sustainable model to be implemented with other companies, and is willing to do what it takes to make this a success.

Success with Step 5: Institutionalize (Deploy) Certification

Step 5: Institutionalize (Deploy) Certification

You will know this new workforce training and certification process has been ‘institutionalized’ when:

☐ The employer documents quantifiable benefits to the program; and they agree to talk with other employers about their experiences and promote the program and workforce certifications.
☐ The employer agrees to identify the certification(s) as preferred criteria for hiring.
☐ The employer agrees to continue to use this (or a modified) training/internship/hiring process to fill their vacancies.
☐ The educational partner agrees to continue to make this training program available to students and to meet future needs.
☐ The college decides to make this new curriculum part of a larger education pathway.
☐ Everything continues successfully into the second and third cycles through the processes.

Success with Step 6: Improve and Sustain

The following are ongoing signs that the certification process you established over months of diligent work is healthy and well:

☐ The planned review meetings have taken place; they are well attended by all partners.
☐ The data has been collected and analyzed; the data validates the value of the investment in the program (and sometimes reveals improvement opportunities).
☐ All parties express an ongoing commitment to continue.
☐ Additional opportunities may have surfaced for certification and training (and plans to address these are being initiated).