

# Shenandoah Valley Workforce Development Board

## Business Services Action Plan



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*The Shenandoah Valley Team*



# Shenandoah Valley Business Services - Background

- Geographic location and service region
- Alignment of two Business Services Teams
- Shenandoah Valley Region is known for collaboration
- Virginia Career Works - new workforce branding initiative
- Local areas act autonomously (training, outreach materials, CRM, funding, models)
- Business Services Requirements Policy effective 10/1/17
- State Business Services Team

**Integrated  
Business  
Services  
Vision**

In five years the Valley Workforce Business Services Team will be the recognized point of contact for the regional business community by building trust and collaboration among partners to deliver integrated business solutions to regional businesses.

| <b>What are our top 3 strategies?</b>   | <b>How will we get there?</b>   | <b>How long will this take?</b>   | <b>Who's responsible?</b>  | <b>How will we know we're successful?</b>  |
|---|---|---|--|--|
| <i>Think Smart, Measurable, Actionable, Relevant, Time-Oriented)</i>                                      | <i>Specific action items</i>  | <i>Assign a time</i>  | <i>Individual/org accountable</i>  | <i>One year from now</i>   |
| BST Formation<br>(Formalize Team, Build Services Awareness, and Train BST Members)<br>Forming to Storming | <ol style="list-style-type: none"> <li>Determine core BS team and referral partners. Invite partners to join the team</li> <li>Develop Team Charter, Mission, Vision, Values, MOU</li> <li>Fund Business Development Manager</li> <li>Conduct cross partner program business services training</li> <li>Plan for business services training.</li> </ol> | <ol style="list-style-type: none"> <li>Ongoing:<br/>Discussed at April 2018 BST meeting. New members invited to June 2018 meeting.</li> <li>August 2018</li> <li>July 2018</li> <li>June 2018</li> <li>Fall 2018</li> </ol> | <ol style="list-style-type: none"> <li>SVWDB Business Development Manager</li> <li>SVWDB Business Development Manager and Team</li> <li>SVWDB Board, CEO, CFO</li> </ol> | <ol style="list-style-type: none"> <li>The team has engaged member representation from most partners</li> <li>The Charter, Mission, Vision and Values have been collaboratively developed and implementation has begun</li> <li>Business Development Manager and partners have developed a level of trust among team members.</li> </ol> |

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|--|--|--|---|---|
| <p>Functional Alignment<br/>(Conduct asset mapping, align resources)<br/><br/>Storming to Norming</p>        | <ol style="list-style-type: none"> <li>Identify services of each partner and prepare asset map</li> <li>Conduct facilitated partner alignment sessions</li> </ol>  | <ol style="list-style-type: none"> <li>Collect information in June 2018 and present draft at July 2018 meeting</li> <li>Facilitated sessions July - September</li> </ol> | <p>SVWDB staff - Data and Communications Specialist, Business Development Manager</p> | <ol style="list-style-type: none"> <li>BST members are aware of the services offered by each partner and refer businesses to the appropriate team member for services.</li> <li>BST members have participated in the business services integration sessions, understand and have buy-in regarding partner coordination</li> </ol> |
| <p>Integrated Outreach<br/>(Develop materials and incorporate technology)<br/><br/>Norming to Performing</p> | <ol style="list-style-type: none"> <li>Design and produce traditional outreach materials (Hard copy, PowerPoint) based on successful models.</li> <li>Develop a mobile application to connect businesses to services</li> <li>Develop an online orientation for businesses</li> <li>Develop business podcasts</li> </ol> | <ol style="list-style-type: none"> <li>4 months</li> <li>6 months - development process started April 2018</li> <li>Fall 2018</li> <li>Spring 2019</li> </ol>            | <p>SVWDB Data and Communications Specialist, Business Development Manager</p>         | <ol style="list-style-type: none"> <li>Materials are developed and being used successfully by BST members</li> <li>Number of businesses served has increased</li> </ol>   |

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|---|---|--|---|--|
| Customer Relationship Management<br><br>(Partner Communication and business data)<br><br>Performing | <ol style="list-style-type: none"> <li>1. Develop partner communication tool</li> <li>2. Conduct partner communication meetings</li> <li>3. Assess CRM systems being utilized by VA LWDAs</li> <li>4. BST CRM discussion and recommendation regarding next steps</li> <li>5. Board review and funding decision</li> </ol> | <ol style="list-style-type: none"> <li>1. April to implement in May</li> <li>2. Ongoing</li> <li>3. Ongoing</li> <li>4. Fall 2018</li> <li>5. Fall 2018</li> </ol> | SVWDB Data and Communications Specialist and Business Development Manager   | <ol style="list-style-type: none"> <li>1. BST members are using tool to communicate between BST meetings</li> <li>2. BST members are participating in meetings</li> <li>3. LWDA CRM information has been assessed</li> <li>4. BST members have reached consensus regarding CRM vision and product recommendation</li> <li>5. Board decision regarding funding</li> </ol> |
| Seek Funding<br><br>Implementation and Sustainability   | <ol style="list-style-type: none"> <li>1. Investigate funding options</li> <li>2. Cost allocation with partners</li> <li>3. Develop grant proposals</li> </ol>  | <ol style="list-style-type: none"> <li>1. Ongoing</li> <li>2. Summer 2018</li> <li>3. As funding opportunities are available</li> </ol>                            | <ol style="list-style-type: none"> <li>1. SVWDB staff and BST members</li> <li>2. BST member organizations</li> <li>3. SVWDB staff and BST members</li> </ol> | <ol style="list-style-type: none"> <li>1. Funding options have been identified</li> <li>2. Partners have agreed to a cost allocation method for the delivery of business services</li> <li>3. Proposals have been awarded</li> </ol>   |

Questions?