SERVING AS AN EFFECTIVE INTERMEDIARY

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Veronica Buckwalter, Senior Program Manager, Jobs for the Future

Judy Hasselkus, Program Director for Employer Engagement and Sector Specialist for Health Care, Agriculture, and Life Sciences, IDWD

Shannon Doody, Director of Education Workforce Partnerships, Center of Excellence in Leadership of Learning
OVERVIEW OF PRESENTATION

Key Roles and Functions of the Intermediary

Key Capabilities, Knowledge, and Experience of Effective Intermediaries

Addressing Gaps to Identify/Become a Strong Intermediary

Toolkits, Templates, and Resources to Help Guide Intermediaries
KEY ROLES AND FUNCTIONS OF THE INTERMEDIARY
FISCAL INTERMEDIARY VS. INTERMEDIARY

• Fiscal Intermediaries (aka fiscal agent, fiscal employer, fiscal support entity, financial management service, fiscal sponsor)
  • Often the direct grantee/recipient of funds
  • Responsible for tracking, monitoring budget expenditures, invoicing, and identifying potential over- and under-spending
  • Assures adherence to federal and state laws and regulations
  • Ensures compliance with documentation requirements related to management of public funds

• Intermediaries (aka backbone organizations, conveners, organizers, mobilizers)
  • May or may not be a partnership’s fiscal intermediary (one way is not better than the other)
WHY IS AN INTERMEDIARY IMPORTANT?

Intermediary

- Economic & Workforce Development
- Industry Associations
- K-12
- Higher Education
- Local/State Agencies
- CBOs, Non-Profits, Foundations
- Employers
- Adult Basic Education

Sector Partnerships

- K-12
- Higher Education
- CBOs & Non-Profits
- Employers
- Organized Labor
- Industry Associations
- Economic & Workforce Development
- Local/State Agencies
- Adult Basic Education
KEY ROLES AND FUNCTIONS

Guide Vision and Strategy

Establish Shared Measurement Practices

Advance Policy

Support and Align Activities

Build Public Awareness and Will

Mobilize Resources
GUIDING VISION AND STRATEGY

- The status quo
- Different agendas & priorities
- Mistrust and competition
- Short-term versus long-term
- Lack of awareness of the issues
SUPPORT AND ALIGN ACTIVITIES

Data Collection & Analysis
Career Awareness
Work-Based Learning
Incumbent Worker Training
Policy Advocacy

Career Awareness
Work-Based Learning
Program Advisory Committees
Incumbent Worker Training
Data Collection & Analysis
Policy Advocacy
What can be and should be measured to demonstrate impact and success?

What are stakeholders currently measuring and how are they measuring it?

What must be measured that we are currently not measuring and are we able to start measuring it? What are the barriers?

What other partners, resources, policies or systems are needed in order to measure and assess impact?

How do we engage, partner, and collaborate to effectively and legally gather the data we need?
BUILD PUBLIC AWARENESS AND WILL

1. Onboarding/Recruitment of stakeholders
2. Gathering success stories and testimonials
3. Management of website & social media presence
4. Development of branding/logo campaign
5. Enabling stakeholder ownership and buy-in
6. Management of media requests, marketing materials, public appearances
POLICY ADVOCACY

Roles of the intermediary

- Set Goals & objectives
- Identify Advocacy Issue
- Develop Message
- Identify Targets/Threats
- Mobilize Resources
- Gather Evidence
- Monitor, Evaluate, Learn
- Analyze the Situation
- Implement Action Plan
MOBILIZE RESOURCES

What does it mean to “mobilize” resources?

What it DOES mean
• Identifying potential sources of funding
• Gathering necessary data and information to submit for funding
• Identifying creative ways of raising funds and securing new partners
• Engaging necessary partners and funders
• Evaluating the effectiveness and efficiency of staff, projects, initiatives supported by funds
• Identifying ways that funding can support/align to programmatic activities
• Identifying opportunities to blend or braid funding streams

What it does NOT mean
• Responsible for securing all needed financial and non-financial support
• Responsible for coordinating, responding to, and applying for all funding opportunities
• Taking full responsibility for the sustainability and continued operation of the partnership
KEY CAPABILITIES, KNOWLEDGE, AND EXPERIENCE OF EFFECTIVE INTERMEDIARIES
**CAPABILITIES**

**Staff Capacity**
Dedicated staff and resources focused on partnership development, supporting the activities of the partnership, and measuring success.

**Engage Regional Stakeholders**
Confident approaching potential partners and conveying partnership benefits in order to recruit new stakeholders.

**Maintain Objectivity**
Ability to listen to and process ideas and suggestions taking into account all perspectives and ensure all voices are heard while maintaining neutrality.

**See the Long-Term, Big Picture**
Recognize the importance of maintaining momentum and securing quick wins while keeping in mind the long-term goals and objectives of the initiative.

**Network & Build Awareness**
Well-established and recognized throughout the region as a trusted and reputable organization capable of building public support and buy-in.
KNOWLEDGE

Industry Dynamics
- Key industry leaders, workforce challenges, and policies and regulations impacting workforce

Workforce Development Strategies
- Proven models, strategies and best practices such as career pathways, industry-recognized and stackable credentials, work-based learning, career awareness, and incumbent worker training

Economic Drivers and Challenges
- Key factors that significantly impact the economic well-being of the region and the challenges that are currently influencing those factors

Marketing and Communication Strategies
- Effective strategies for communicating the partnerships missions, objectives, and success to the community and regional stakeholders

Fiscal Compliance and Management
- Understanding of key fiscal management practices to ensure compliance and adherence to state and federal regulations
EXPERIENCE

Organizing Stakeholders across Multiple Committees
Managing the agendas, objectives, activities and achievements of multiple committees and subcommittees

Identifying & Recruiting Partners
Seeking out new potential stakeholders that can impact the success of partnership activities and grow capacity

Developing a Common Agenda and Goals
Aligning the agendas and priorities of diverse stakeholders to identify common threads and shared goals among the entire group

Managing Meetings & Events
Scheduling, planning and executing effective meetings for high-level executives to include meeting logistics, materials, staffing, and follow-up

Fundraising, Grant Writing, Resource Development
Identifying and securing funding from a variety of sources utilizing a variety of innovative strategies. Thinking creatively about resource allocation
ADDRESSING THE GAPS

What strategies do you suggest for organizations seeking to serve as intermediaries that may not have all of these key capabilities, knowledge, and experience?

What advice do you have for collaboratives looking for a strong convener/backbone, but are having difficulty finding an organization that has the required skills, experience, and knowledge?

Ms. Shannon Doody

Director of Education Workforce Partnerships, Center of Excellence in Leadership of Learning (CELL)
INNOVATION NETWORKS
Q&A
TOOLS, TEMPLATES, AND RESOURCES TO GUIDE INTERMEDIARIES
http://www.nextgensectorpartnerships.com/

Developed by JP MorganChase, the State of California, and the Colorado Workforce Development Council

All resources are free of charge.

Resources include:
• Community of Practice
• Comprehensive toolkit
• Samples, templates, worksheets
• Successful strategies/models
• Videos of actual partnership meetings
www.collectiveimpactforum.org

• Developed by FSG and The Aspen Institute
• Free of charge, but registration required
• Aimed at collective impact initiatives, but can be adapted for sector partnership activities

Resources:
• Training manuals and toolkits
• Templates, worksheets, sample job descriptions
• Free webinars and technical assistance events
• Inventory of Initiatives and Success Stories
• Communities of Practice for backbones and funders
http://ctb.ku.edu/en

- Developed by the University of Kansas
- Free of charge, but registration required
- Aimed at collective impact initiatives, but can be adapted for sector partnership activities

Numerous toolkits specific to:
- Creating and Maintaining Partnerships
- Assessing Needs and Resources
- Analyzing Problems and Goals
- Developing Strategic and Action Plans
- Influencing Policy Development
- Evaluating the Initiative
- Writing Grant Applications for Funding
- Sustaining the Work and Initiatives
THANK YOU!

PLEASE REMEMBER TO COMPLETE THE SUMMIT EVALUATION IN YOUR FOLDERS AND RETURN AT THE REGISTRATION DESK