

SECTION 2 Scope of Work

2.1 Executive Summary

Iowa Workforce Development (IWD) has been working diligently to become fully compliant with the Workforce Innovation and Opportunity Act (WIOA). As part of that effort, the Iowa State Workforce Development Board (ISWDB) has been working with IWD to designate new local workforce development areas (LWDA). As part of this transition, IWD is being intentional about preparing all the local workforce system partners to carry out their respective roles and responsibilities. Further, IWD would like to enhance its capacity at the state level to sustain and support the local workforce system infrastructure for the long term.

Maher & Maher is the sole-source technical assistance (TA) contractor to the United States of Labor's Employment and Training Administration (ETA) for implementation of WIOA. They are a specialized change management and workforce development consulting firm that delivers tailored solutions to public sector organizations and commercial clientele. The firm is known for innovative organizational development solutions that focus on managing change, fostering collaboration, process improvement, specialized training, message customization, e-Learning strategy and design, and executive and work group facilitation.

2.2 Project Tasks

Refer to Attachment A, for a detailed breakdown of Maher & Maher's approach to support IWD in the realignment of Iowa's local workforce areas. Each project task addresses a specific need previously identified and will deliver important outcomes to establish Iowa as a WIOA compliant state. IWD may select which tasks to pursue, given strategic and resource consideration. Task 1 is the only required task.

SECTION 3 Project Managers

4.1 Project Manager – Maher & Maher

The project team which we have assembled for this work includes workforce experts who possess deep subject matter knowledge combined with technical assistance and training expertise and deep expertise in transformational change. Brief biographies of our lead team members are below.

Beth Brinly, our Vice President of Workforce Innovation, will provide oversight to the project as well as act as a subject matter expert (SME) on this project. Beth is a transformational leader and a significant advocate nationally for regional approaches, spanning 28 years of state and federal service, including projects in statewide and regional workforce asset mapping, sector strategy development, school to work partnerships, and talent pipeline development. Beth led the WIOA governance planning and implementation process in Kentucky. Beth also cofacilitated the Ohio Workforce Leadership Forum coalescing local workforce area leaders regarding strategic and systemic issues statewide around an action plan to address them. Most recently, Beth served as Deputy Secretary of the Kentucky State Education and Workforce Development Cabinet. She also served as Commissioner of the Kentucky Department of Workforce Investment and was the Division Chief of Workforce Investment in the U.S. Department of Labor’s Philadelphia Regional Office. Beth holds a BS from the University of Louisville and an M.Ed. from Pennsylvania State University.

Carrie Yeats, our Director of State and Regional Workforce Solutions, will be the Project Director and provide strategic direction, oversight, guidance and counsel to the project team. Carrie has extensive experience leading large initiatives for local, regional, and state workforce and economic development collaboratives. Her consulting experience includes projects in organizational benchmarking, competitive assessments, asset mapping, regional planning, sector strategy development, and target industry analysis. Immediately before coming to Maher & Maher, Carrie served as a consultant with Luminance, Inc., a performance improvement company based in Toronto, Canada. She developed customized training materials and delivered training courses for global consumer products manufacturers. Carrie also held practitioner and management roles in several economic development organizations where she worked closely with US-based and international manufacturing on workforce and relocation issues.

Lynn Bajorek is a Program Manager at Maher and will serve as a subject matter expert on the project. She has 20 years of experience supporting continuous improvement across all levels of the public workforce system. Lynn leads and supports a variety of projects with the United States Department of Labor’s Employment and Training Administration and states and local areas to support effective WIOA implementation. Lynn’s most recent work includes managing two CareerSource Florida sector strategy and career pathways projects as well as serving as the

regional advocate for two USDOL/ETA's Regional Offices to plan technical assistance and training designed to help states and local areas in those regions implement innovative workforce solutions. Lynn also develops and delivers training and resources for effective programmatic monitoring, high impact Workforce Boards, integrated business services and sector strategies, as well as provides support for strategic planning and project implementation. Prior to her work at Maher, as a Policy Specialist with the Michigan Works! Association, Lynn worked with both the state workforce agency and local areas in Michigan to develop compliant and innovative policy designed to drive strong outcomes for business and job seeker customers. As a Federal Project Officer with the USDOL/ETA in both Regions 4 and 5, Lynn worked with State and local system grantees to improve performance outcomes through effective service design and delivery. Lynn's work in the ETA regional office included involvement in a collaborative project to identify indicators of local level integration for the development of a regional assessment tool; and substantial work on the development of the ETA Core Monitoring Guide, which assesses grantee effectiveness through key indicators around governance, policy, case management and placement.

Lori Collins has 25 years of experience in workforce development. She has served as a local workforce development board director as well as a state administrator in Kentucky. Most recently, Lori led programs for a nonprofit focused on individuals with barriers to employment. She has extensive experience in workforce development policy and practice, program planning, integration of multiple programs for a shared vision, as well as program design and delivery for universal populations and targeted populations such as individuals with disabilities and justice system connected individuals. Additionally, Lori has robust experience in employer engagement and business services strategies having led such efforts at a local level and a state level. Lori has a BA in Sociology from Georgetown College and a Master of Rehabilitation Counseling from the University of Kentucky.

Christina Herzog is a Consultant with Maher & Maher with 20 years of experience in the private sector, academia, and the public workforce system. She has most recently served as a Coach and Analyst for projects including Sectors Strategies, Governance and Boards, and is currently providing technical assistance for WIOA Regulations TA. Prior to joining Maher & Maher, Christina was with the New Jersey State Board, leading the state Health Care Workforce Council, managing a project with the National Governor's Association to align state agency work around building the talent pipeline, and providing technical assistance to local boards. Christina also worked for 3 years on multiple projects with the Heldrich Center for Workforce Development at Rutgers University around the development of industry specific career awareness tools, and was the Project Director for a Transportation, Logistics, and Distribution Talent Network (sector engagement effort). Previously she also taught public policy and American government courses at Washington State University, and managed recruitment and placement as well as business development functions in the private sector.

Gretchen Sullivan, with Maher for 11 years, will serve as a SME. Gretchen has been lead facilitator, SME, and trainer on many of the firm's key projects for the federal government; state and regional organizations, and other clients in the workforce development, education,

and economic development spheres. Gretchen has been our lead subject matter expert (SME) in our statewide sectors and WIOA implementation projects in Missouri, South Carolina, Illinois, and Florida. Gretchen played a lead role in supporting the Kentucky's statewide sector strategies development effort and coached regional teams on the design of sector strategies in their particular areas. She also supported Kentucky's Career Center Certification, Workforce Academy, Customer Flow and Unified Business Services efforts, all of which were grounded in a sector strategies framework. Gretchen's current work includes supporting the District of Columbia, Virginia, and Kansas on projects spanning sector strategies, career pathways development, training design and delivery, on-the-job training enhancement efforts, and customer-centered design. Prior to joining Maher & Maher, Gretchen worked for ETA in San Francisco and DC for 8 years. She holds a BA from Smith College.

Reanin McRoberts is a Senior Analyst & Project Manager with over 10 years of experience in workforce development and project management. Reanin will serve as the Project Manager of this project. As a member of the Maher & Maher team, she supports projects in the State and Regional Workforce Solutions Practice. Before joining Maher & Maher she served with community colleges implementing the U.S. Department of Labor's Trade Adjustment Assistance Community College and Career Training (TAACCCT) grant programs, which were designed to align with local business needs to provide industry-recognized credentials and career pathways for adult students. She also worked on evaluations of programs focused on populations with barriers to employment at MDRC, a social policy research organization. Reanin has a Master of Public Affairs and Politics degree from the Edward J. Bloustein School of Planning and Public Policy at Rutgers University, as well as a B.A. in English and Sociology from the College of New Jersey. Reanin lives and works in New Jersey.

4.2 Project Manager -Iowa Workforce Development

Beth Townsend – Director

Ryan West – Deputy Director

Cathy Ross – Chief Operations Officer

Mike Witt – Division Administrator, American Job Centers

Brenda Boten – Division Administrator, Workforce Services

Michelle McNertney – Bureau Chief, Workforce Services

ATTACHMENT A Project Tasks

Task 1: Project Kick-off

At the outset of the project, we will meet in person with IWD leadership to prepare the IWD project team members and our team for maximum alignment and effectiveness throughout the project. We will review the scope of work for all phases and validate the approach to each task, activities, and timeline and make any necessary revisions. Elements of this phase include:

- **Project Kick-Off Meeting** – This in-person meeting will serve to level-set expectations early and will cover all key aspects of the project process, including goals, milestones and timelines. We will also establish single points of contacts (SPOCs) between the consulting team and IWD.
- **Discuss and Refine Needs and Coordination with Other Key Initiatives** – The kick-off meeting will include a facilitated discussion designed to (a) get a fuller sense of IWD’s goals and objectives and (b) explore whether there is any significant resistance anticipated throughout any of these activities. We will want to be briefed on related project and policy implementation activities to-date. Finally, we will discuss measurements of success.
- **Senior Leadership Meeting** – The IWD project team will schedule a meeting with Senior Leadership to take place during this first trip to discuss the upcoming work and process and seek their support of and engagement in the project. Maher will attend this meeting and support the IWD project team by providing consultation and direction as requested. Key leaders who we would envision participating include the Governor’s Office representative, Beth Townsend, Ryan West, Cathy Ross, and others.
- **Prepare a Project Plan** – We will develop a detailed project plan and share with the IWD team for concurrence. The plan will include documentation of project tasks, timelines, and responsible parties, along with any other elements desired by the client. The project plan will be tracked on a continuous basis and progress shared regularly with the client team.
- **Develop a Collaborative Workspace (CWS)** – If desired, we will deploy an easy-to-use online CWS to support collection and sharing of information and project deliverables among and between Maher project team members and the IWD project team throughout the life of the work.

Estimated Timeline: May - June 2019

Deliverables:

- In-person kick-off meeting
- Project plan
- Collaborative workspace

Task 2: Stakeholder Engagement to Guide Realignment Implementation

In collaboration with IWD, Maher will support IWD in a stakeholder engagement process designed to involve a variety of important stakeholders in the realignment implementation. The process we recommend is as follows:

Task 2.1: Establish WIOA Core Partners Group

Maher will support IWD in the formation of a WIOA Core Partners Group that is appointed by respective agency leadership and has authority to engage in policy development and other joint activities under WIOA such as monitoring/oversight, technical assistance, etc. Maher will support IWD in the facilitation of quarterly meetings of the group and guide the development of a charter.

Estimated Timeline: Ongoing

Deliverable:

- Quarterly in-person meetings with the WIOA Core Partners Group

Task 2.2: Stakeholder Engagement

IWD, with the logistics support and facilitation of the Maher team, will host three webinars – one for each stakeholder group: chief elected officials, board members, and other stakeholders. The purpose of the webinars is to educate the stakeholders on the realignment process as well as their role in it. The webinars will be recorded and made available to any who miss the live version.

Then the project team, in coordination with IWD, will facilitate three “listening sessions” in six locations across the state (three listening sessions per location). Each stakeholder group (CEOs, local board members, and other stakeholders) will be invited to their own session. The agenda for each session will be customized by audience but will consistently focus on capturing feedback and identifying concerns regarding the realignment implementation process.

We envision that we will complete the sessions (a total of 18 meetings) over two weeks.

Estimated Timeline: June – October 2019

Deliverable:

- Three webinars
- 18 listening sessions
- Summary of listening sessions

Task 3: Develop Realignment Implementation Framework

In collaboration with IWD, the Maher team will facilitate planning sessions and collaborative discussions to develop a detailed framework to implement the realignment. The framework will include processes and timelines to accompany the already-identified realignment tasks.

Multiple stakeholders within IWD should be involved in planning sessions including representation from legal as well as staff who oversee field operations and the certification of local boards. We envision that there will be one in-person planning sessions along with several virtual meetings to finalize the framework.

The IWD/Maher project team will then facilitate an in-person meeting of senior leadership to review and vet the implementation framework. Key leaders who we would envision participating include Governor's Office representative, Beth Townsend, Ryan West, Cathy Ross, and others. The goal of this meeting is to seek feedback on the framework and make needed refinements, confirm support for the realignment tasks, and affirm the process as stakeholders raise issues or concerns throughout the implementation process.

Estimated Timeline: June - December 2019

Deliverable:

- Realignment Implementation Framework

Task 4: Develop Communication Materials to Support Realignment Process

The Maher team will work with IWD staff to develop a communication plan to support the realignment. The communication plan will include outreach strategies, timelines and channels by audience. Additionally, materials such as FAQs, one-pagers, and content for newsletters and other mediums will be developed through this. Ongoing communication and just-in-time resources for CEOs, board members, and other partners will be priorities.

Estimated Timeline: Ongoing

Deliverables:

- Communications plan
- Materials and resources such as FAQs, one-pagers and other needed content

Task 5: Iowa State Workforce Development Board Orientation and Training

The Maher team will develop and deliver a three-hour orientation, training and visioning session for ISWDB members and staff that outlines the role of state boards under WIOA, the expectation that state boards provide a vision for the state and local workforce system and state board functions and responsibilities. The content will also include suggested promising practices from around the country and strategies for the Board to consider for adoption to maximize their strategic impact and step into their role as the governing body for the Iowa workforce system. The team suggests that this training be provided at one face to face session, if possible, to support the Board's development of a clear vision and consensus around its role and responsibilities.

An accompanying orientation and training guide will be developed and provided to each attendee.

Estimated Timeline: June 2019 - January 2020

Deliverables:

- Orientation / training delivered once
- ISWDB orientation / training and guide

Task 6: CEO Orientation and Training

The Maher team will develop and deliver a 3-hour orientation and training session for chief elected officials. The session can be delivered five times at various locations across the state to ensure maximum participation. The session should include context and background for the realignment, the state's vision for the delivery of workforce services, the role of CEOs, and other important topics relevant to support the realignment.

An accompanying orientation and training guide will be developed and provided to each attendee. Additionally, we will record a virtual, asynchronous session for those unable to attend an in-person session (promoted/offered after the in-person sessions are completed to encourage participation in the in-person training).

We envision conducting the five sessions over the course of two trips.

Estimated Timeline: June 2019 - February 2020

Deliverables:

- Orientation / training delivered three times
- CEO orientation / training and guide
- Virtual, asynchronous session

Task 7: Local Board Member Orientation and Training

Similar to the CEO orientation and training, we will develop and deliver a 3-hour orientation and training session for local board members. Assuming the new local area configuration results in up to six local workforce areas, the session will be delivered one time for each of the local boards. We would plan to deliver the trainings over three trips, traveling to Iowa after the certification of every two boards.

The session should include context and background for the realignment, the state's vision for the delivery of workforce services, the role of the local board and its members, and other important topics. Core partners could be engaged in the development and review of the draft of the Board member training.

An accompanying orientation and training guide will be developed and provided to each attendee. Additionally, we will record a virtual, asynchronous session for those unable to

attend the in-person session (promoted/offered after the in-person sessions are completed to encourage participation in the in-person training).

Estimated Timeline: Rolling (development starting in June, delivery tentatively between February - August 2020, after certification of every two boards)

Deliverables:

- Orientation / training delivered six times over three trips (2 boards per trip)
- Local board member orientation / training and guide
- Virtual, asynchronous session

Task 8: State Level Coaching and Consultation

The Maher project team will provide ongoing coaching and consultation regarding realignment tasks and related policies and forms, as well as on WIOA implementation. We have budgeted 16 hours for this task per month and will work with IWD to identify which staff will participate in this activity. Once identified, a coaching plan will be developed for each staff member for the duration of the coaching activity.

Estimated Timeline: June 2019 – October 2020

Deliverables:

- Personalized coaching plan
- Virtual coaching, consultation and review of policies, forms, etc.