



Strategic Skills Initiative Research and ID Grant
Cover Sheet

Economic Growth Region # 6 : Eastern Indiana Economic Growth Region

1. Funding Request			
Requested: \$ 303,581		Start Date: 6/15/05	End Date: 2/28/06
2. Designated Grantee			
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County: Delaware	FEIN: 31-1103963		
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Lead Team Members			
Name:	Industry:	Title:	Signature:
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Dennis Burns	Construction	President	<i>Dennis A. Burns</i>
Dennis Chambers	Education	Asst. Superintendent	<i>Dennis A. Chambers</i>
Joseph Evans	Labor	Business Representative	<i>Joseph Evans</i>
Dr. Rob Jeffs	Education	Chancellor	<i>Dr. Rob Jeffs</i>
Nancy Kinder	Economic Development	Executive Director	<i>Nancy D. Kinder</i>
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Executive Summary

The Proposal

This proposal outlines a comprehensive plan of action to assess, analyze, and address the workforce shortcomings and the economic development of eastern Indiana – the nine county region designated as Economic Growth Region 6. Our basic goal is to fundamentally change the approach to workforce development by deploying resources to meet the most pressing needs in the economy, instead of offering a fixed menu of services. As will be seen below, this effort is broad-based, with region-wide support and participation. Throughout the research and identification process, we have built in the support and structure for carrying on this important work beyond the life of this project, through the addition of permanent, trained staff.

For this Research and Identification phase of Strategic Skills Initiative, the Eastern Indiana Economic Growth Region requests funds in the amount of \$303,581, for work to be conducted over the period 6/15/2005 until 2/28/2006. In the remainder of this summary, we detail (i) the special circumstances in this region that support this request, (ii) the team of leaders, advisors, and consultants that will direct and participate in this project, and (iii) the major steps taken in the project itself.

The Need For Action

The nine counties that comprise Eastern Indiana, or Economic Growth Region 6, have a proud history. The gas boom, the invention of motorized aircraft, and the first development of the automatic transmission have roots in this part of the state. Yet the most recent decades have produced much less favorable results for the economy of this region. We feel these circumstances argue strongly for increased attention and focus on the labor force needs in eastern Indiana.

The population loss that affected many portions of Indiana in the wake of the 1980's recessions did not stop in eastern Indiana in subsequent years. That is in stark contrast to other areas of the state, as shown in Figure 1. The nine counties that comprise Region 6 are the only economic growth region in the entire state to have fewer residents today than in 1990. Population in eastern Indiana is about 6,000 lower, or 0.2 percent, in 2004 than in 1990 (Source: STATS Indiana). By comparison, the Indianapolis region added almost 300,000 new residents over the same period.

This population loss is due to out-migration of younger aged people, in response to better economic opportunities elsewhere. The decline in opportunity in the region can be summarized by comparing its job growth to what has occurred in the remainder of the state.

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Figure 1
Population Growth, 1990-2004
Indiana Economic Growth Regions

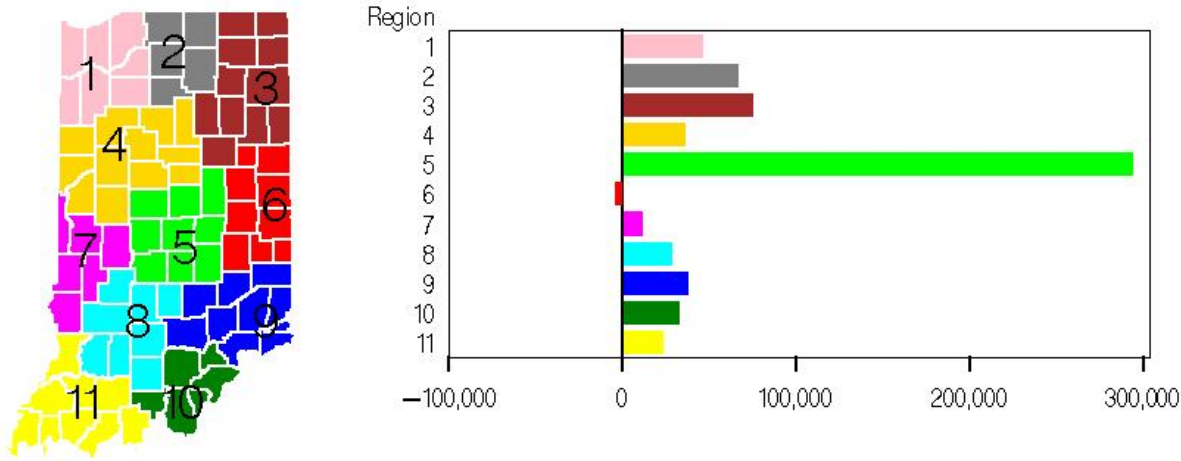
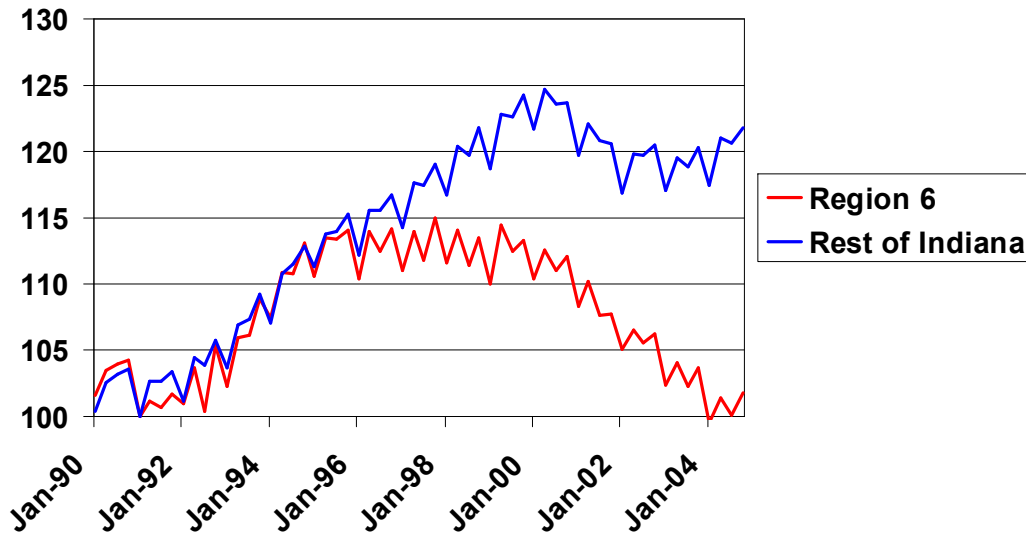


Figure 2
Region 6 and Indiana Covered Employment, 1990-2004
Index, 1991 Q1 = 100



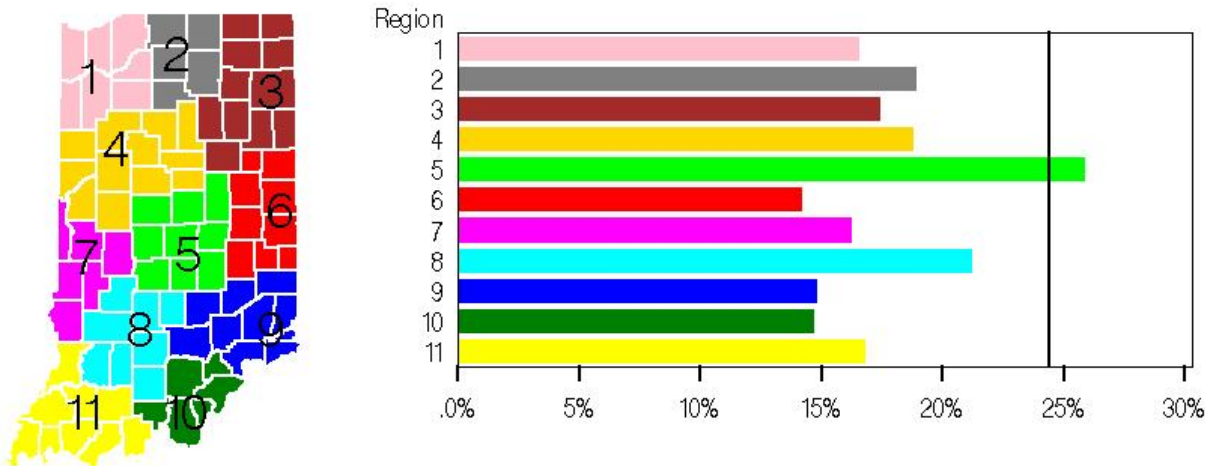
Employment growth was very similar, and very healthy, for both Region 6 and the rest of the state of Indiana through the first half of the 1990's, as is shown in Figure 2. (The graph shows job totals for each geography relative to their levels in the first quarter of 1991. Source: U.S. Bureau of Labor Statistics). But at the decade's midpoint, employment in eastern Indiana stagnated while the rest of the state kept growing payrolls. And even though the most recent recession was difficult and painful, its effect on Region 6 was even more severe.

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The distressing result is that while covered employment is about 20 percent higher everywhere else in the state of Indiana than it was fourteen years ago, it is virtually unchanged in eastern Indiana. The decline in relative job opportunities in this part of the state is an urgent problem that is deserving of attention.

An unfortunate consequence of the relative deterioration in the eastern Indiana economy has been the training and skill level of the labor force. Since younger, more educated people also tend to be most mobile, the outcome of net out-migration has been a relative decline in educational attainment of the adult population. As is depicted in Figure 3, the fraction of the population aged 25 and older who have at least a 4-year college degree is lower than any other region of the state, and 10 percentage points lower than the national average (shown by the vertical reference line on the graph).

Figure 3
Percent of Adult Population with a College Degree, 2000
Indiana Economic Growth Regions



The Strategic Skills Initiative recognizes that the preparation and training of the labor force, particularly in occupations with high wages and high growth potential, is of crucial importance for the performance of the regional economy. Eastern Indiana is a region that has an especially urgent need to understand the impediments to its economic growth, and to act decisively and effectively to relieve them.

The Leadership Team

We have assembled an outstanding team of executives and key leaders to direct and participate in this project.

SSI Executive Team

The SSI Executive Team (E-Team) is a small focused group that will be the coordinating, guiding, driving, and final decision making body for the Region 6 Strategic Skills Initiative. The E-Team will direct the Project Staff and receive input from the Consortium as well as from the work generated by Project Staff and Consultants.

Eastern Indiana Region 6 Strategic Skills Initiative

The Executive team consists of:

- **Jim Riggle (chair)**, Economic Development and Community Affairs Manager for Indiana Michigan Power.
- **E. Roy Budd**, Executive Director of Energize-ECI, a regional non-profit economic development entity for East Central Indiana.
- **Dennis Burns**, President, Burns Corporation, Hagerstown, Indiana
- **Dennis Chambers**, Assistant Superintendent, Rush County Schools.
- **Joe Evans**, Business Agent, Indiana/Kentucky Regional Council of Carpenters
- **Dr. Rob Jeffs**, Chancellor of Ivy Tech Community College of Indiana, East Central Region.
- **Nancy Kinder**, Executive Director of the Eastern Indiana Development District.

SSI Consortium

Equally and perhaps even more important than the Executive Team is the SSI Consortium. The Consortium, which includes the Executive Team, is a much broader coalition of individuals than the Executive Team. The Consortium represents all counties and many sectors providing for a geographic and sector representation diverse group. Membership to this important group was determined, in part, through the identification of key regional stakeholders. The Consortium will be heavily involved in all phases of the Strategic Skills Initiative. It is the role of each individual member and the body as a whole to support, promote and participate in SSI activities as appropriate, i.e. forums, focus groups, interviews, surveys, strategic planning, etc.; bring his/her specific knowledge/expertise to bear on this initiative; provide input into SSI research/products/reports; and provide input to the Executive Team when each report is at the review and approval level. In addition it is the role of the Consortium to keep their respective boards and constituency aware of this initiative and its progress.

Eastern Indiana Region 6 Strategic Skills Initiative

The Consortium members of this project are provided in the following listing.

**Region 6 Eastern Indiana Economic Growth Region
Strategic Skills Initiative Consortium
7/29/2005**

First Name	Last Name	Organization Name	City	County									Sector	
				Blackford.	Delaware	Fayette	Henry	Jay	Randolph	Rush	Union	Wayne		
Terry	Allen	Cardinal Health System, Inc.	Muncie		X									Employer
Will	Barada	Barada Associates, Inc.	Rushville							X				Employer
Dr. Patrick	Barkey	Ball State University	Albany		X									Education
Delaina	Boyd	BSU - COR	Muncie		X									Education
Larry	Braden	Community & Family Svs., Inc.	Portland					X						CBO
John	Brooks	Delaware County Commissioner	Muncie		X									Government
Kathy	Clayton	AFL-CIO	Connersville			X								Labor
Bryan	Coats	Henry County EDC	New Castle				X							Economic Development
Mayor Steve	Croyle	City of Winchester	Winchester						X					Government
Fred	Davis	U.A.W. C.A.P. Council	Winchester						X					Labor
Milton	Eley	Whitewater Technical Career Center	Connersville			X								Education
Elaine	Fisher	Center for Econ. & Comm. Dev.	Muncie		X									Economic Development
Vicki	Glaze	DWD	Muncie		X									Labor Market Information
Greg	Griffin	Rush County EDC	Rushville							X				Economic Development
Betty Lou	Heintz	New Castle-Henry Co. COC	New Castle				X							Business Organization
Rusty	Hensley	Richmond High School	Richmond										X	Education
Richard	Heupel	Center for Econ. & Comm. Dev.	Muncie		X									Economic Development
Bob	Hobbs	New Castle Community Schools	New Castle				X							Education
Vikki	Johnson	Wayne County EDC	Richmond										X	Economic Development
Mindy	Kenworthy	Blackford County EDC	Hartford City	X										Economic Development
Jim	Kraft	East Central Indiana SBDC	Richmond										X	Business Organization
Pam	Leisure	Rush Co. COC	Rushville							X				Business Organization
Jo Ann	McCowan	Muncie Area Career Center	Muncie		X									Education
Jim	Meinerding	United Communities National Bank	Winchester						X					Employer
Terry	Murphy	Delaware Advancement Corp.	Muncie		X									Economic Development
John	Oberle	Oberle & Associates Inc.	Richmond										X	Labor
Bob	Quadrozzi	Jay County Development Corp.	Portland					X						Economic Development
Howard	Scheetz	Jarden Home Brands	Muncie		X									Employer
Jim	Steck	Ivy Tech Community College	Richmond										X	Education
Christy	Steele	Vision 2006 Econ. Dev. Alliance	Muncie		X									Economic Development
Blanche	Stelle	Union County Dev. Corp.	Liberty								X			Economic Development
Dan	Stewart	Achieva	Richmond										X	Employer
Avis	Stewart	Earlham College	Richmond										X	Education
Vicki	Tague	Portland C.O.C.	Portland					X						Business Organization
Rick	Taylor	Delaware Machine&Tool Co.,Inc.	Muncie		X									Employer
Elizabeth	Troy	Consulting Partners, LLC	Farmland						X					Employer
Mayor Dennis	Whitesell	City of Hartford City	Hartford City	X										Government
Joe	Wolfe	Reandolph County EDC	Winchester						X					Economic Development

Eastern Indiana Region 6 Strategic Skills Initiative

Project Overview

This Strategic Skills Initiative, funded by the Indiana Workforce Development, presents a unique opportunity for the counties identified as Region 6 to:

1. congeal as a Region,
2. clearly understand its strengths and weaknesses as a Region,
3. determine causes for its weaknesses, and the opportunities for growth,
4. identify a broad based strategy to capitalize on its strengths, and
5. develop an action plan to address the root causes preventing the Region from increasing employment opportunities for its residents and increasing their income.

Our objective is to develop a clear understanding of the skill shortages expected both in the near term and long term, their root causes and specific executable solutions tied to those root causes thus creating a demand driven system. The solutions will be evaluated based upon the best return on investment in achieving the overall goals of increasing employment and income for our residents.

In order to achieve these objectives it will be imperative that good data is available to be analyzed, which requires the preliminary investment in a well organized and focused research and identification component. Furthermore it is crucial to involve the solutions sectors in this initiative in order to create understanding and ownership of the root causes and ultimate solutions.

An important by product of this initiative is the creation of a diverse, but cohesive group of individuals and organizations from the Region committed to managing a dynamic and evolving economy. As this driving force becomes convinced of the value of the process and its ability to produce results, the process can become institutionalized and continue beyond the seed resources committed by the Indiana Workforce Development.

In the end the Region 6 Eastern Indiana Economic Growth Region will have answered the following questions.

1. Where are the skills shortages and how large are they – actual and projected – existing industries and emerging?
2. What are our skills advantages and other strengths that provide an opportunity to grow employment as the demand side of the equation?
3. Why do these skills shortages really exist, are they supply or demand side causes, and
4. What are some very specific actions that can be taken to address those root causes that will achieve the goals of this initiative, which is to increase the employment and earnings of the residents of this Region while contributing to the health of the economy of the State of Indiana and the Nation?

In addition we will have accomplished the following:

1. Validation of each specific solution against the Skills Shortages Report and Root Causes Report to assure there is a clear connection.
2. Evaluation and prioritization of each validated specific solution with regard to such factors as innovation, sustainability and returns on investment.

Eastern Indiana Region 6 Strategic Skills Initiative

This project's major activities include:

Organizational Activities

- Assembling and tasking the Consortium and the Executive Team

The leadership, experience, and region-specific knowledge of these groups of individuals will play a crucial role in the success of the overall project;

- Hiring and training of a Project Lead/Analyst and Support Staff

The increase in our capacity to continue the analysis and strategic decision making process beyond the life of this project is an important benefit;

- Procurement of consultants

Analysis

- Regional Wage and Fringe Benefits Survey

We will contract with a consultant to carry out a comprehensive assessment of compensation practices for selected occupations in the region;

- Key Cluster and Competitiveness Analysis

An analysis of the key industry clusters, both present and emerging, as well as their growth potential, will be prepared by the Project Lead/Analyst and the Ball State University Bureau of Business Research;

Skills Shortage Analysis

Working with the data and training tools from Indiana Business Research Center (IBRC) and Workforce Associates, we will carry out detailed projections of demand and supply for key occupations in the regional economy;

Information Gathering

- We will make extensive use of community forums and focus groups to gain insights from key stakeholders and to gather feedback to preliminary results;
- We will contract with a consultant to carry out approximately 60 in-depth, one-on-one interviews with executives and key institutional leaders to learn their concerns and obtain their assessment of the factors that influence the state of the workforce;

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- We will contract with a consultant to conduct 240 surveys of incumbent workers and students as it relates to understanding the gaps in entries into and preparation for occupations in demand/skills shortages.
- The project will have an important presence on the Web, with a professionally designed web site to announce project activities, distribute important resources, and to solicit input from the community;

Discussion and Assessment

- We will work with a consultant to convene a day-long strategic planning retreat that will examine and prioritize the root cause findings of the first two phases of the project, to develop the basis for the solutions proposed.

This Planning Grant Application has been developed under the leadership of the Executive Team with the opportunity for input and comment by each Consortium member. Just under 50% of the Consortium and Executive Team members provided comments on the draft plan. Those comments are contained in an Attachment to this Application beginning on Page 48. The Summary of Comments demonstrates the depth and breadth of concern of Consortium members and, as such, has been preserved as a part of this document so they can be revisited during the appropriate Phase of this Project. Other comments were valid, as noted, and the draft Application was adjusted accordingly.

Work Statement

This statement of work responds to the direct questions asked in the Request For Application (RFA). Woven throughout this section are parts of the overall elements of the Eastern Indiana Economic Growth Region's Plan to Plan. While the RFA is a well thought out framework for accomplishing the stated goals of the Strategic Skills Initiative, much of the information from which the planning will be derived is not yet available. Therefore, this Plan to Plan is presented with the qualification that it is the best description of the anticipated process to provide the Executive Team and Consortium with the information required to make good decisions. This section describes the foundation and process for the planning and the expected methods to be employed. The Executive Team is optimistic that the IWD SSI Team will be open to flexibility, with permission, if primary and secondary research dictates that another type or mix of research would be more appropriate within the approved budget.

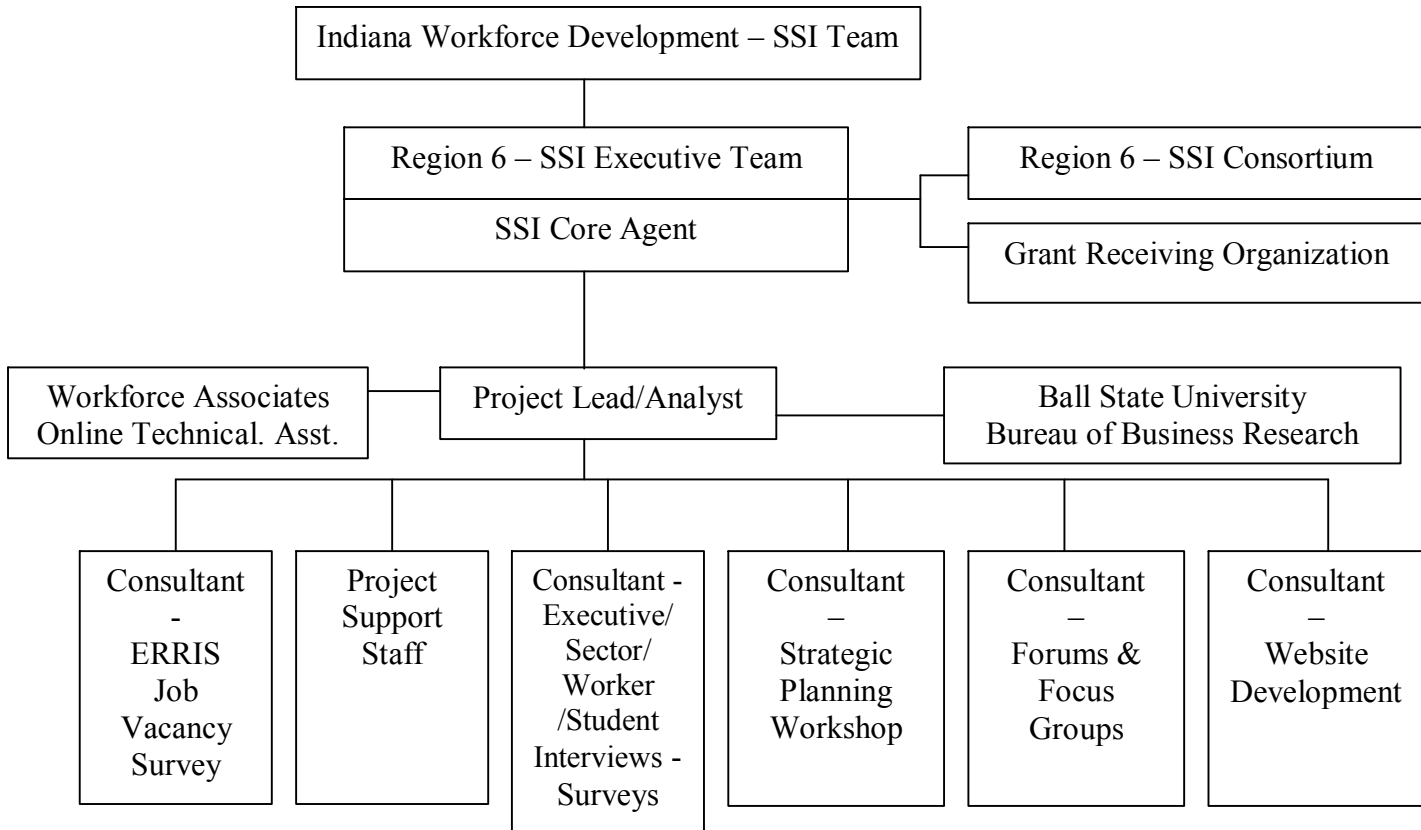
1. Description of Qualifications of the individuals who will undertake the work.

For the State Strategic Skills Initiative the Indiana Workforce Development has designated Barbara Street as the Core Agent for the Region 6 Eastern Indiana Economic Growth Region. Street functions on a day-to-day basis as the full time executive director to the East Central Indiana Workforce Investment Board, Inc. (ECIWIB). In that capacity she is assisted by part-time staff to provide the financial accounting and Board/Committee support. This newly formed Region spans across the East Central Indiana Workforce Service Area in its entirety and the four northern most counties of the Southeastern Indiana Workforce Service Area. This geographic region, in and of itself, offers a challenge to staff to organize it into a cohesive region under the newly released State Strategic Skills Initiative. The lack of ECIWIB staff to dedicate to this Initiative, when coupled with very tight timelines for achievement of the stated goals and the locally determined activities deemed necessary for success, dictates the need to increase the staff in order to accomplish the work of the project.

The Executive Team embraces the importance of the concept of hiring staff and developing the capacity of that staff to conduct the regional analysis as described in the SSI Request for Application. Much like the old adage, ***“If you don't know where you are going any road will take you there.”*** but the question is ***“Will you like the destination when you get there?”*** The drivers of the Eastern Indiana Economic Growth Region are determined that the region's destiny can be positively influenced and as such has developed the following staffing pattern in order to accomplish the work at hand. This project is staffed through a blend of seasoned workforce staff and economic experts combined with dedicated Project Staff and consultants to provide specific work products. The Executive Team believes this approach to accomplishing the work will allow Project Staff to focus on and develop skills during this Research & ID phase while benefiting from the work of skilled experts in areas beyond his/her skill sets.

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The following chart depicts the governance and staffing of this project more fully described in the subsequent narrative.



SSI Executive Team

The SSI Executive Team (E-Team) is a small focused group that will be the coordinating, guiding, driving, and final decision making body for the Region 6 Strategic Skills Initiative. The E-Team will direct the Project Staff and receive input from the Consortium, as well as, from the work generated by Project Staff and Consultants.

The E-Team will be chaired by **Jim Riggle**, Economic Development and Community Affairs Manager for Indiana Michigan Power. Mr. Riggle brings to the E-Team his knowledge and understanding of economic development through his work with Indiana Michigan Power in a multi-county area of this Region. He works directly with Local Economic Development Organizations and their professional staff in industry attraction and expansion efforts. Riggle is entering his 3rd term as Chairman of the East Central Indiana Workforce Investment Board, Inc. guiding the implementation of a successful strategic planning effort during his Chairmanship.

The E-Team includes **E. Roy Budd**, Executive Director of Energize-ECI, a regional non-profit economic development entity for East Central Indiana. Energize-ECI is a collaborative organization structured to coordinate and facilitate economic development, workforce issues, and federal grants to enhance the region’s economic development. Budd was the former President and CEO of Opportunity, Inc., of Hampton Roads, Virginia (Virginia’s largest workforce development program) and Executive Director of the Peninsula Workforce

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Development Center for Thomas Nelson Community College in Hampton, Virginia, one of the first workforce development centers located in the Commonwealth of Virginia.

Dennis Burns joins the E-Team representing private sector as the President of Burns Corporation located at Hagerstown in Wayne County Indiana. Burns has been a member of the Workforce Investment Board of Southeastern Indiana since 2003 and has functioned as the Chair since 2004. Mr. Burns is a board member of the Richmond/Wayne County Chamber of Commerce and Economic Development Corporation of Wayne County. He served as Chairman of the EDC in 2003. Recruited for his keen business sense and knowledge of both the Workforce and Economic Development sectors, Burns brings a wealth of understanding and leadership to this initiative.

Joining the E-Team, **Dennis Chambers** is employed as the Assistant Superintendent with the Rush County Schools. While an educational representative, Mr. Chambers was chosen for his strategic leadership and out of the box thinking as it relates to development of the region and its workforce. His interest in workforce development has emerged through his work with Rush County on the CAPE III initiative grant to help further the efforts of building a Lifelong Learning Center that will advance the skills of the Rush County Workforce. In addition to school district responsibilities, he also serves on the Rush County Community Center Executive Board and the Whitewater Technical Career Center Advisory Board.

Representing organized labor, **Joe Evans** joins the E-Team as the Business Agent for the Indiana/Kentucky Regional Council of Carpenters. Mr. Evans has served as a member of the East Central Indiana Workforce Investment Board, Inc. for over five years and as a member of the Incumbent Worker Council since its inception. Evans brings to the E-Team a wealth of information and understanding about people and their skills, as well as the respect of all levels of the community from labor to the highest levels of government and business. He is a member the Muncie-Delaware County Chamber of Commerce and functions on four of its six standing committees, is on the Board of Directors of the Youth Opportunities Center and United Way. As a Ball State University graduate with a Bachelor's Degree, Evans is highly involved in the governmental affairs and the community in order to make it a better place for everyone.

Dr. Rob Jeffs is the Chancellor of Ivy Tech Community College of Indiana, East Central Region. With a BA in Biology/Chemistry, MA in Industrial Arts and Ph.D. in Educational Administration, he joined IVTC in 1985. Dr. Jeffs was named as Chancellor of the East Central Region in 1997. He has been instrumental in the development of the Muncie Campus into a valuable community resource that works hand in glove with Ball State University, Area Vocational Schools, the community, and industry in developing the skills and education of our workforce in East Central Indiana. His vision and leadership has placed him at the forefront of many IVTC statewide initiatives, including,

- o distance learning via two-way video,
- o transfer agreements with four-year universities (particularly Ball State),
- o online child development courses,
- o workforce development partnerships, and
- o nursing and allied healthcare program expansion

Eastern Indiana Region 6 Strategic Skills Initiative

The E-Team is rounded out with **Nancy Kinder**, Executive Director of the Eastern Indiana Development District (EIDD), a regional economic development district designated by the Economic Development Administration. Ms. Kinder works closely with communities and their economic developers in the central and southern counties of the region, along with coordinating regional economic development projects. EIDD recently established a Regional Agribusiness Development Specialist to focus on economic development in the agribusiness sector. Ms. Kinder is vice-chair of the Indiana Association of Regional Councils, and is a member of the Indiana Rural Development Council Governing Board and its Rural Entrepreneurship Taskforce.

Core Agent

The Core Agent for this SSI is **Barbara Street** and as such she will act as the Regional SSI Project Leader. This role will include acting as the Single Point of Contact for the completion of the SSI work, including all deliverables many of which will be accomplished by Project Staff or Consultants. She will support the Executive Team and Consortium and provide overall coordination of all aspects of the SSI in conjunction with the Project Staff. The Core Agent will work with the Grant Receiving Organization to assure the project is complying with the requirements of the Fiscal Agent and the state. The Core Agent will provide overall project management and guidance to the Project Staff to assure the work of the SSI is achieved within budgetary and regulatory parameters. In conjunction with the Ball State University Bureau of Research and Workforce Associates, the Core Agent will assure the technical work of the Project Staff meets the expectation of the SSI. As the designated Core Agent, Barbara Street brings to this position the knowledge and understanding of the East Central Workforce Service Area counties, the knowledge and skills of effective community organization and outstanding leadership. With a BS in Business Administration and expertise in planning and project management, she will oversee all aspects of this initiative to assure that the goals are achieved in an organized and timely manner and that regular updates are provided to the respective Executive Team, Consortium, WIBs, Local and State Elected Officials, and future Regional Workforce Boards, as well as, the State.

SSI Consortium

Equally and perhaps even more important than the Executive Team is the SSI Consortium. The Consortium, which includes the Executive Team, is a much broader coalition of individuals than the Executive Team. The Consortium represents all counties and many sectors providing for a geographic and sector representation diverse group. Membership to this important group was determined, in part, through the identification of key regional stakeholders. The Consortium will be heavily involved in all phases of the Strategic Skills Initiative. It is the role of each individual member and the body as a whole to support, promote and participate in SSI activities as appropriate, i.e. forums, focus groups, interviews, surveys, strategic planning, etc.; bring his/her specific knowledge/expertise to bear on this initiative; provide input into SSI research/products/reports; and provide input to the Executive Team when each report is at the review and approval level. In addition it is the role of the Consortium to keep their respective boards and constituency aware of this initiative and its progress.

Eastern Indiana Region 6 Strategic Skills Initiative

The Consortium will be relatively static in its membership, however members may be added over the course of this Research and ID Phase as research dictates the need. While there are some private sector businesses on the Consortium, those private sector members have been selected more due to their overall interest and leadership in workforce development than their representation of a specific industry cluster. The Executive Team determined that it did not want to prejudice the outcome of the Occupational Skills Shortages Report by involving perceived or assumed Occupational Skills Shortages area industry representation. Industry cluster input and engagement will occur through shorter and more intensive participation in one on one Executive Interviews, Surveys, county forums, and focus groups. In the later phases of the Research & ID process, more industry sector representatives may be included in order to assure they buy into and agree with the root cause and proposed solutions.

The Consortium membership does not contain Service Providers for the Workforce Investment Act, although the input and recommendations of that sector will be sought during the forums, focus groups, and sector interviews. The Consortium at the time of this Planning Grant Application has 38 members identified. The following matrix shows the diversity in geographic and sector representation in the Consortium membership.

SECTOR	COUNTY										
	Blackford	Delaware	Fayette	Henry	Jay	Randolph	Rush	Union	Wayne	Regional	TOTAL
CBO					1						1
Business Organization				1	1		1			1	4
Economic Development	1	2		1	1	1	1	1	1	2	11
Education		1	1	1					1	4	8
Employer		2	1			2	1		1		7
Government	1	1				1					3
Labor						1			1	1	3
Other										1	1
TOTAL	2	6	2	3	3	5	3	1	4	9	38

Eastern Indiana Region 6 Strategic Skills Initiative

The Consortium members of this project are provided in the following listing.

Region 6 Eastern Indiana Economic Growth Region Strategic Skills Initiative Consortium 7/29/2005

First Name	Last Name	Organization Name	City	County										Sector		
				Blackford.	Delaware	Fayette	Henry	Jay	Randolph	Rush	Union	Wayne				
Terry	Allen	Cardinal Health System, Inc.	Muncie		X											Employer
Will	Barada	Barada Associates, Inc.	Rushville								X					Employer
Dr. Patrick	Barkey	Ball State University	Albany		X											Education
Delaina	Boyd	BSU - COR	Muncie		X											Education
Larry	Braden	Community & Family Svs., Inc.	Portland					X								CBO
John	Brooks	Delaware County Commissioner	Muncie		X											Government
Kathy	Clayton	AFL-CIO	Connersville			X										Labor
Bryan	Coats	Henry County EDC	New Castle				X									Economic Development
Mayor Steve	Croyle	City of Winchester	Winchester						X							Government
Fred	Davis	U.A.W. C.A.P. Council	Winchester						X							Labor
Milton	Eley	Whitewater Technical Career Center	Connersville			X										Education
Elaine	Fisher	Center for Econ. & Comm. Dev.	Muncie		X											Economic Development
Vicki	Glaze	DWD	Muncie		X											Labor Market Information
Greg	Griffin	Rush County EDC	Rushville							X						Economic Development
Betty Lou	Heintz	New Castle-Henry Co. COC	New Castle				X									Business Organization
Rusty	Hensley	Richmond High School	Richmond											X		Education
Richard	Heupel	Center for Econ. & Comm. Dev.	Muncie		X											Economic Development
Bob	Hobbs	New Castle Community Schools	New Castle				X									Education
Vikki	Johnson	Wayne County EDC	Richmond											X		Economic Development
Mindy	Kenworthy	Blackford County EDC	Hartford City	X												Economic Development
Jim	Kraft	East Central Indiana SBDC	Richmond											X		Business Organization
Pam	Leisure	Rush Co. COC	Rushville							X						Business Organization
Jo Ann	McCowan	Muncie Area Career Center	Muncie		X											Education
Jim	Meinerding	United Communities National Bank	Winchester						X							Employer
Terry	Murphy	Delaware Advancement Corp.	Muncie		X											Economic Development
John	Oberle	Oberle & Associates Inc.	Richmond											X		Labor
Bob	Quadrozzi	Jay County Development Corp.	Portland					X								Economic Development
Howard	Scheetz	Jarden Home Brands	Muncie		X											Employer
Jim	Steck	Ivy Tech Community College	Richmond											X		Education
Christy	Steele	Vision 2006 Econ. Dev. Alliance	Muncie		X											Economic Development
Blanche	Stelle	Union County Dev. Corp.	Liberty									X				Economic Development
Dan	Stewart	Achieva	Richmond											X		Employer
Avis	Stewart	Earlham College	Richmond											X		Education
Vicki	Tague	Portland C.O.C.	Portland					X								Business Organization
Rick	Taylor	Delaware Machine&Tool Co.,Inc.	Muncie		X											Employer
Elizabeth	Troy	Consulting Partners, LLC	Farmland						X							Employer
Mayor Dennis	Whitesell	City of Hartford City	Hartford City	X												Government
Joe	Wolfe	Reandolph County EDC	Winchester						X							Economic Development

Eastern Indiana Region 6 Strategic Skills Initiative

Project Lead/Analyst

The Project Lead/Analyst will be the fundamental expert and staff of the Executive Team associated with this initiative. The Project Lead/Analyst will provide the technical expertise associated with the data analysis related to all aspects of the Initiative. As the Project Lead, this individual will work closely with all partners in the Initiative, and in particular will be provided training, guidance and oversight by both Workforce Associates and Ball State University Bureau of Business Research. The Project Lead/Analyst's capabilities and capacity will be supplemented through the work to be conducted by the various Consultants for this project. The work and methodology of the Project Lead/Analyst, and therefore the Executive Team, Consortium and all Consultants, will be guided by the IWD recommended methodology as outlined in the How-To-Handbook. In addition the Executive Team and Consortium acknowledge the importance of and intent to utilize the information and expertise provided through the SSI Web-based workshops and online meetings that will be provided by both IWD and Workforce Associates. As such, the cost of the latter has been included in the budget. Job Description provided as an attachment on Page 43.

Project Assistant

The Project Assistant will assist the Project Lead/Analyst on a day-to-day basis to accomplish the work of the Initiative. The Project Assistant will participate in as many activities as possible in order to expand his/her knowledge and awareness. As support staff for the project this position will be responsible for communications, logistics, report generation, publication, and website postings. Job Description provided as an attachment on Page 46.

Project Consultants

Consultants will be used in this Initiative to complement the skills of the staff and to extend the capacity of the staff. Three Consultants are being identified in the narrative as Sole Source or State Procured contracts with the remaining consultant functions being procured following appropriate ECIWIB procurement policies and procedures.

Patrick M. Barkey – Patrick M. Barkey, Ph.D., Director of Economic and Policy Studies in the Bureau of Business Research (BBR) at Ball State University, will serve as Consultant on this study. Dr. Barkey has directed and participated in a wide variety of research projects related to the performance of the economy of Indiana and its regions, with particular emphasis on the development of the labor force. He has also been a professional forecaster for more than twenty-five years. During July and August he will assist with the writing of the Planning Grant Application and gather relevant and beneficial University resources to provide to the Project Lead/Analyst. He will participate in the recruitment and interviewing process for the Project Lead/Analyst position to assure the applicant's possession of the fundamental skills required for success in carrying out the SSI requirements. The amount of this contract is \$4,500. This contract has been sole sourced by the Executive Team due to the urgency of completing the Planning Grant Application, hiring of the dedicated Project Staff and working with that Project Staff and/or completing the work that will be required to meet the stated timeline until staff are hired. The hourly cost to be reimbursed under this Sole Source Contract is the same that is charged by Dr. Barkey for similar contracted work outside of Ball State University.

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Workforce Associates – A state procured and approved contractor, Workforce Associates will be a consultant with this Project to develop and standardize the skills of the Project Staff in relationship to the research and statistical analysis of the Initiative. Through participation in a series of online meetings with Workforce Associates, the Project Staff will be provided instruction, guidance, technical assistance and feedback.

Ball State University – Bureau of Business Research – The Executive Team views the partnership and collaboration with Ball State University as a powerful catalyst to the success and sustainability of this project. As such, the Ball State University Bureau of Business Research through Patrick M. Barkey, has been identified as a Sole Source Contract for this Project. Ball State University, through the assignment to Dr. Patrick M. Barkey with the Bureau of Business Research, will act in the capacity of day to day technical guidance and resource for the Project Lead with regard to the analysis function. Dr. Barkey will provide the Project Lead with resources and information available through the University and provide mentoring to the staff until such time that the staff can function independently. Dr. Barkey will assist with the hiring and orientation process; participate with the Core Agent in the technical aspects of Project Management as well as assisting with the report writing as needed (\$17,832). In addition the Bureau of Business Research will assist the Region with some primary research by conducting a region-wide Wage & Fringe Benefits Survey (\$20,000). The total amount of this contract is \$37,832. This contracted rate is the standard rate charged through the University and has been approved by the Vice President of University Research, James Pyle.

ERRIS – ERRIS will function in the capacity as a consultant for the Initiative while conducting a Job Vacancy Survey of area companies. While procured at the state level, a contract will be signed at the local level with the understanding that this contract meets all procurement and other regulatory requirements of the state. The amount of this contract is \$13,455. ERRIS will deliver the Job Vacancy Report to the Executive Team and Project Staff for use during all phases of this Project.

Consultants to be procured - There are several Consultants to the project that will provide specific specialized short term work/products for the Initiative. They include purchase of service for:

- Executive/Sector/Worker/Student Interviews and/or Surveys will be conducted by individuals hired through a consulting firm(s). These interviews will be face to face with Executives in the Occupational Skills Shortages areas and/or growth industries for the purpose of researching the root causes and skill sets that are demanded. Other Sector/Worker/Student Interviews and/or Surveys identified to be needed by the Executive Team and/or Consortium will also be conducted through this consulting contract. Consultants retained to conduct this facet of the project will be expected to have an understanding of the industry sector(s) within which they will be conducting the interviews. These interviews could also result into additional research as to recruitment and retention issues faced by these industries.
- A vendor will be retained to assist in the educational facet of the upfront forums to be held in each county. During this Pre-Application process it was pointed out to the Executive Team that there are some counties in the new

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Region 6 whose leadership do not want things to change. With the knowledge that “not changing” will certainly mean “change” which likely will not be positive for the county or Region, the Executive Team has determined that an educational component is imperative to lay the foundation for establishing the mindset necessary for looking to the future.

- A vendor will be procured to develop the website that will serve as the focal point for the information/research generated through this Research & ID Phase. The website will be the site for the on-line surveys and other input gathered through the Research and ID Phase. This website will later serve this Initiative and the Regional Workforce Board during the Solutions Implementation Phase and continue to be a resource for the member counties, LEDOs, Regional Organizations and other information seeking entities.
- A vendor will be retained to facilitate a Strategic Planning Retreat to facilitate the work of the Consortium and Executive Team in sifting through the Skills Shortages and Root Causes Reports and, as a result, develop a set of recommendations and priorities to become the basis of the Solutions Report.

Grant Receiving Organization

The Grant Receiving Organization will have the responsibility to assure the Executive Team and Project Staff are in compliance with the financial and other regulatory procedures associated with the use, documentation and reporting for this grant. In addition the Grant Receiving Organization will be responsible for assuring an appropriate Cost Allocation Plan is in place, audit and monitoring of the funds is conducted and property is reported. The Grant Receiving Organization will provide to the Executive Team and the Core Agent monthly financial reports for the management of the project. The Grant Receiving Organization, named by the Core Agent and approved by the Executive Team, is East Central Opportunities, Inc. Functioning currently in the capacity as the Fiscal Agent for the East Central Indiana Workforce Investment Board, Inc., East Central Opportunities, Inc. has a good working relationship with the Board, Local Elected Officials and Staff and has an exemplary record of audit.

2. Discussion of how current initiative will be coordinated across current WIB boundaries to ensure that it is responsive to all areas of the EGR.

The Region 6 Eastern Indiana Economic Growth Region is made up of the East Central Indiana Workforce Service Area in its entirety and the four northern most counties of the Southeastern Indiana Workforce Service Area. The new nine county Region includes the East Central Indiana counties of Blackford, Delaware, Henry, Jay and Randolph counties and the Southeastern Indiana counties of Fayette, Rush, Union and Wayne counties. In order to be successful, this initiative has been developed with the goal of building a cohesive coalition of individuals from all counties in the new Region committed to the stabilization and growth of the economies of their community and the Region. For this reason the development of a common understanding, collaboration and development of a cohesive vision of the future region between all entities and geographic areas of the Region will be necessary for the success of the Strategic Skills Initiative.

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In an effort to bring solidarity and commitment, as well as provide for geographic representation for the newly formed Region 6, the Chief Elected Officials for each of the respective Workforce Service Areas provided input into the identification and selection process for both the Executive Team and Consortium.

With the goals in mind for solidarity and commitment, the individuals who have been selected and have agreed to participate on the Executive Team include the Private Sector Chairs of both the East Central and Southeastern Workforce Boards. Their inclusion will enhance the participation, collaboration, and communication within and between the two Workforce Boards, their WorkOne partners, subcontractors and elected officials.

The Executive Team also includes a Regional Economic Development representative from the southern most counties and one representing the central and northern counties in the Region. Each of the counties in the Region has a Local Economic Development Organization in place and at least one full-time professional, with the exception of Union County which shares their executive with their Chamber of Commerce. The inclusion of these two regional representatives will assist in the communication and collaboration with the Local Economic Development Professionals in the Region.

Two additional regional representatives have been selected as Executive Team members for their strategic level thinking and diversification in background, which includes the Indiana/Kentucky Regional Council of Carpenters and Ivy Technical Community College of Indiana. The Executive Team is rounded out with the Assistant Superintendent of Rush County High Schools likewise chosen for his overall attribute as a strategic thinker rather than necessarily for his sector representation. The Executive Team Membership follows:

1. Jim Riggle - Indiana Michigan Power - ECIWIB Chair and Executive Team Chairman
2. E. Roy Budd – Energize ECI, Inc. – Executive Director
3. Dennis Burns - Burns Corporation – SEIWIB Chair
4. Dennis Chambers – Rush County Schools – Assistant Superintendent
5. Joe Evans –Indiana/Kentucky Regional Council of Carpenters - Business Agent
6. Dr. Rob Jeffs – Ivy Tech Community College of Indiana, East Central - Chancellor
7. Nancy Kinder – Eastern Indiana Development District – Executive Director

When analyzed, the seven member Executive Team has representation from five of the nine counties in the Region and, considering the Regional representatives, there is representation from all nine counties.

The Executive Team will be supported with a Consortium that is diversified in both its geographic and sector representation. The invitation and selection of the Consortium members was at the direction of the Executive Team with input from the Chief Elected Official from the respective Workforce Boards. The membership includes existing Workforce Board members as well as representatives of the local economic organizations, Chambers of Commerce, labor organizations, vocational and post secondary education, and local government, to name a few. See Page 18 for the Consortium membership roster.

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The sheer geographic size of the Region provides a challenge in the development of trust, participation, communication, and ownership by all parts of the Region. For this purpose the design of the Project has been very purposeful in its cultivation of a partnership and plan that embodies these characteristics. In the planning grant methodology the steps that will be followed in order to build a strong foundation, for this initiative and those to come, are clearly articulated. The methodology includes an educational process to provide an understanding of the importance of this initiative and the potential impact it can have on the local community and the Region. The economic future of the Region and Indiana will be based, in part, upon the success of the communities that make up the Regions and Indiana. For this reason the project methodology is built on the premise that in order to get involvement at the local level it is important to go to the local level with the information gathering tools. Likewise, the information is only as valuable as those who understand it, so in the methodology you will find that the locally based forums will begin with an educational component followed by information sharing and finally information gathering.

To ensure coordination and participation from all areas of the Eastern Indiana Economic Growth Region, logistics and invitations to those local forums will be coordinated with the local Chambers of Commerce, Local Economic Development Organizations, local elected officials, Workforce Boards and other industry/labor organizations. Broad community awareness will be encouraged not only with invitations, but through radio, cable and newspaper announcements. During the initial phase at these nine separate county based forums, the net will be cast very wide in order to garner an understanding of and support for the initiative while gathering broad input and feedback on the initial data collection and current planning efforts at the local and regional levels.

To efficiently continue communications after the initial county based forums and throughout the Research and ID Phase, a website will be developed. Modeling this initiative after the effectiveness of the IWD SSI information dissemination process, funding will be utilized early in the planning grant to establish a functionally efficient website that will be the repository of the information and data sets developed through the SSI planning process. The website will be the “place to go” to find the information needed for local planning, via the website or link to other websites on the state, regional and local level. In addition the website will be used for online input and surveys during the Research and ID Phase.

As the SSI enters the implementation stage and the Regional Workforce Board is appointed, the website will continue to evolve and potentially serve as the Regional Workforce Board website carrying forward and institutionalizing this important information to the future planning for workforce development. This website may, as well, become the regional website for the economic development initiatives as State Economic Development Regions are aligned with the Economic Growth Regions. The incorporation of the website into the ongoing workforce development and economic development operations will provide for, not only the sustainability of the website, but will also provide Line of Sight from the SSI to the Regional Board and WorkOne system’s future resource investments.

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3. *Discussion of the specific plans to integrate regional sector and industry representatives in all steps of the research and analyses processes.*

The Executive Team supports the importance of broad input from all sectors, including industry representatives, throughout each step of the Research and ID Phase. This is evidenced by the make-up of both the SSI Executive Team and Consortium, which has broad and diverse membership in both geographic and sector representation. Thirteen of the members on the combined membership of the Executive Team and Consortium would be considered to be Regional in nature. The Project Timeline, beginning on Page 30 of this Planning Grant Application provides clear evidence of the process and intent for broad level input throughout the process.

The early opinion of the Executive Team is that industry executives, in this competitive economic environment, are very selective of the commitments they can reasonably make with their time. Concerns have also been expressed at the State level, and shared at the Regional level, that the process could be biased if assumptions are made regarding our Occupational Skills Shortages industries/occupations and therefore representation on the Consortium. For these reasons the Executive Team and Consortium membership, does not have heavy representation from the industrial sectors, although both have the representation of the sectors that can convene these industries, such as the Chambers of Commerce and Economic Development Organizations.

Instead, the Region 6 processes will include other methods to gather industry input such as Executive Interviews, Business Roundtables, Surveys and Focus Groups. After the sectors are selected there will be a focused effort to assure connectivity is developed and maintained to gather and affirm the accuracy and practicality of the Root Causes and Solutions Reports. In addition, the methodology incorporates the use of technology through information posting and input opportunities provided via the website described on Page 27 to gather more input at their convenience, which may be outside of normal business hours. While not specific to the question, it is pertinent to mention at this juncture that the engagement of representatives from industry sectors is expected to include worker and labor interviews, focus groups and/or roundtables. The successful businesses of today and the future are those that have an effective partnership between management and labor. For this reason it would seem critical to assure labor/worker input is provided in the primary research phase.

Through the use of all of these methods, including working in conjunction with Chambers of Commerce, Local and Regional Economic Development Organizations, Ball State University Building Better Communities, labor representatives/councils and local elected officials, it is expected that the process will provide for not only engagement and participation, but the integration of the regional and private industry sectors throughout the process. By achieving this goal, industry root causes will be appropriately identified and subsequently addressed through the Solutions Report. Projects and services of value will be recognized and supported in the future. By doing this right the first time, the critical industry sector representatives will be willing to participate in subsequent years in anticipation of continued success. The contrary is also true. Our failure to engage these sectors in this initiative will certainly result in, at best, a misaligned Solutions Report and therefore disengagement in any future initiatives.

4. Discussion of major primary research that will need to be performed. A listing of specific types (i.e. interviews, survey work, summary) should be included.

The Research & ID Phase of this project includes two types of research – Primary and Secondary. The Secondary Research will be provided to the Region by the State in the form of a data packet. The information in the data packet will be used by the Project Staff, Executive Team and Consortium throughout the life of this project and beyond. The Primary Research is the research that will be conducted by the Project Staff and Project Consultants. The Primary Research will include the ERRIS Job Vacancy Survey, Ball State University Wage & Fringe Benefits Survey, Forums, Focus Groups, and Business Roundtables. Primary Research will also be conducted in the form of Executive Surveys conducted face-to-face with industry representatives. Additional surveys, face to face and on line, will be conducted with Sector Representatives, Workers and Students.

This process represents a marked change in emphasis in workforce development efforts in the Region. We are gathering the information to develop and implement a solutions strategy that is based on the conditions in the marketplace, instead of simply delivering a menu of services. We will also set in place permanent additions to our Region’s capacity to carry these efforts forward into the future.

Phase 1: Skills Shortage Assessment

The fundamental research question of this phase is the identification and estimation of skill shortages in the nine county Eastern Indiana Economic Growth Region. We will explore this question by (i) referencing the results of previous studies, (ii) performing analyses of public data, (iii) obtaining observations and input from key leaders, organizations and workers, and (iv) conducting a survey of employers. During this phase of the Research and ID there will be a focus on the skill sets within and across occupations as Occupational Skill Shortages are identified. The work of the Project Staff and therefore the Executive Team and Consortium will be guided and influenced by the IWD Web-based workshops *and SSI How-To-Handbook*, as well as, the on-line meetings and technical assistance provided by Workforce Associates.

Synthesis and Review of Previous Studies

Most of the counties in the Eastern Indiana Economic Growth Region have recently conducted their own research, either singly or as part of a region, as part of a strategic plan, cluster study, targeted industry study, or other development-related process. We will gather, distill, and reference previous research on the economic structure of the Region, when relevant, to provide a valuable context and point of reference for this study.

Data Analysis

We will prepare and present an analysis of industry clusters, employment and compensation trends, and project labor supply using quantitative methods to be developed by our Consultants and our Project Lead/Analyst. These results will be presented and critiqued by the Consortium, and presented to business and educational leaders.

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The analysis will draw on the employment, earnings and establishment data found in the Quarterly Census of Employment and Wages, the industry and occupation projections made by the Bureau of Economic Analysis, the ERRIS Job Vacancy Survey, and the data packets provided to the Region from the state. We will also utilize the results of a regional wage and fringe benefit survey that will be performed by the Consultant as part of this study.

The analysis will flow from general to specific, through the following steps:

1. Identify broad industry clusters that exist (or are emerging) in the regional economy that have good prospects for growth and pay high wages.
2. Identify key industries and employers within those broad clusters whose growth is crucial to overall growth.
3. Isolate which industries/employers are constrained today, or are likely to be constrained in the near future, by the available workforce in Region 6. Within these industries the Consortium will select key industries and/or clusters of industries on which to focus time and resources. These industries will be defined using the NAICS classification system. The Consortium will develop a set of criteria that will be used in the selection process.
4. Detail the gaps in specific skills and/or training that prevent the current and/or future workforce from meeting the demands of these industries and employers.

These analytical results will be informed and refined by the input received from key employers, educational institutions, and other important individuals and organizations in the region, as received through the community forums described below. In this phase particular attention will be given to assuring that shortages are described in terms of skill sets versus occupations.

Community Forums

We will conduct nine separate public forums, one in each county in the region to present the preliminary findings of the research and to gather information and insights on the impediments to skill acquisition and other barriers to labor force development from all points of view.

The research presented at these forums will be confined to the results which broadly describe the economy of the region and the county. This statistical profile is presented as background information for the discussion to follow. Each Community Forum will include an educational component to assure there is an understanding as to the importance of identifying and growing the economy of the Region.

The forums will be used to gather information on the identification of key industries and employers, and to understand how present or potential skill shortages are affecting growth.

Wage and Fringe Benefit Survey

To develop an understanding of how pay and benefit practices vary within the region, and to inform the root cause analysis that will immediately commence upon the completion of this phase, the Consultant will perform a comprehensive Wage and Fringe Benefit survey of employers throughout the region. This will be a mail survey, distributed to a carefully selected sample of employers, whose results will be compiled in a stand-alone report. The Region will maintain the results of this survey in a data base by county so that data can be sorted and packaged at the regional level and sublevels providing maximum value and flexibility for use of the information by regional employers and the LEDOs in their business attraction efforts.

Executive Survey

Additional Primary Research will be gathered through the use of Consultants by conducting one-on-one surveys/face-to-face interviews with Executives from the Industry Sectors that are identified as having Skill Shortages. Each Executive Survey/Interview has the potential to generate an additional set of surveys/interviews by providing an understanding as to where they hire from. For example an Executive Survey/Interview in one industrial area could lead the Primary Research to other industrial areas if that is where they hire their skill sets from. This methodology of Primary Research should assist the project in truly understanding the nature of the Root Causes for the Skill Shortages across industries. As such it is expected that the content of the Executive Surveys/Interviews will gather information on both the Skill Shortage and Root Cause phases in order to streamline the time commitment of the industry Executives to gather information. During these interviews the Consultants will seek a commitment from a specific industry representative who will be willing to continue to be engaged as a subject matter expert to this Initiative.

Sector Survey

Primary Research will be conducted with numerous additional sectors in the form of one-on-one surveys/face-to-face interviews conducted by Consultants. These sector surveys may be identified by the Consortium and Executive Team and/or arise from the Executive Surveys. Other sector surveys will likely include Education, Service Providers, Community Based Organizations and others that are identified or discovered as having valuable input into the shortages and/or root causes.

Website for Data and On-line

A research method that will be used throughout the Research and ID Phase, data collection and input will be gathered on-line. This will be the same website that will be used to disseminate the information and research gathered during this process. It will also be the public domain for the reports during the comment phases.

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Phase 2: Root Cause Analysis

The identification of the causes producing the skill shortages identified in the first phase will rely equally on the analysis of data and the experienced judgment and observation of key leaders in industry, education, and other organizations. As in the previous phase, the work of the Project Staff and therefore the Executive Team and Consortium will be guided and influenced by the IWD Web-based workshops and *SSI How-To-Handbook*, as well as, the on-line meetings and technical assistance provided by Workforce Associates.

This phase will make use of the detailed information gleaned from the results of the Wage and Fringe Benefit Survey conducted in Phase 1. The responses from local and regional employers on pay and benefit practices for a wide array of job positions will give a solid, timely basis for comparison and evaluation of compensation levels as a potential root cause of skill shortages.

We will also analyze the training and education capacity of institutions that serve, or could potentially serve, the region, for those skills and occupations that were determined in the first phase to be in short supply.

This material will serve as background and reference material to support the primary process used to analyze the root cause question – one-on-one interviews with industry and educational leaders throughout the region.

We will work with a Consultant(s) to carry out approximately 60 in-depth, confidential interviews with targeted executives, agency heads, and institutional leaders in the region to gain their insights on the severity and likely causes of skill shortages from their perspective. The text of the interview questions will be carefully constructed based on the results of the Occupational Skills Shortages Report, with input from the Consortium and the Executive Team along with the expertise of Workforce Associates. This component will attempt, in one interview, to gather data on both the skill shortages and the root causes so that an additional interview does not have to be scheduled. During these interviews the Consultants will seek a commitment from a specific industry representative who will be willing to continue to be engaged as a subject matter expert to this Initiative.

While workers/students are not on the demand side of the equation they do hold the knowledge and understanding as to why they do not seek the occupations or skills that are in demand. For this reason a Worker/Student Survey/Interview has been integrated into the Primary Research to be conducted during the Root Cause Phase. Conducted in groups, one-on-one, or on-line, this type of Primary Research was determined to be important while gaining an understanding during the Root Cause Phase. Working with a consultant(s) we expect 240 targeted workers/students to provide survey input.

We will perform content analysis on interview transcripts, and use this information with other data to enumerate and rank the causes of skill shortages in the Region. This summary information will be presented on our web site, and presented to a series of regional focus groups convened to gather further information on capacity, barriers, and opportunities.

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This information will be refined, synthesized and summarized in the Root Causes Final Report.

Phase 3: Development of Regional Solutions

Our approach to soliciting, evaluating, and proposing solutions to the skills shortages will rely heavily on the input resulting from the research conducted during the Root Cause Phase. Relying heavily on those root causes identified by the demand side of the equation and using the facilitation skills of the strategic planning consultant, the Consortium will play a pivotal role in assisting to enumerate, evaluate, and prioritize the potential courses of action to address skills shortages in the Region. To the extent they are willing and able to commit the time, those industry representatives participating in the Skills Shortages and Root Cause Phases will be invited to attend and participate. For those industry Executives unable to participate in the strategic planning retreat, a copy of the proposed solutions and prioritization of those solutions will be provided to get feedback on the accuracy and practicality of the implementation. The outcome of this process, and the specific solutions proposed in the final report, will be the decision of the Executive Team.

- 5. Submission of a schedule of activities in the format provided. The purpose of this attachment is to supply an organized, general overview of major project activities.*

Schedule of Activities Follows

Eastern Indiana Region 6 Strategic Skills Initiative
REGION 6 STRATEGIC SKILLS INITIATIVE PLANNING GRANT APPLICATION
SCHEDULE OF ACTIVITIES

PHASE ONE – RESEARCH & ID PHASE				
Project Activity	Timeline	Staff-Agency Responsible	Effort/Work Hours	Product Produced
Formation and Orientation of Executive Team	6/15/05 – 7/18/05	Core Agent /ECIWIB	16 hours	Executive Team
Formation and Orientation of Consortium	7/18/05 – 7/27/05	Core Agent / ECIWIB & Executive Team	24 hours	Consortium
Drafting, gathering input and finalization of R & ID plan and grant application budget	7/18/05 – 8/5/05	Core Agent/ ECIWIB & Barkey Consulting	128 hours	Planning grant application & budget
Advertising and hiring of Project Lead/Analyst	7/25/05 – NLT 9/6/05	Core Agent/ECIWIB – Barkey Consulting - E-Team	32 hours	Staff hired
Hiring of support staff	7/25/05 – 9/16/05	Core Agent & Project Lead/ECIWIB	16 hours	NA
Participation in Workforce Associates Online Seminars	NLT 9/6/05 – 2/22/06	Project Lead/ECIWIB - BSU	20 hours	Advancement of staff skill sets
Procurement and selection of project consultants	7/25/05 – ongoing	Core Agent & Project Lead/ECIWIB – E-Team	24 hours	NA
Contract and begin implementation of Regional Wage & Fringe Benefits Survey.	9/6/05 – 10/14/05	Project Lead/ECIWIB – and selected Consultant	130 hours	County and Regional Wage & Fringe Benefits Survey
Selection of Website Consultant	8/26/05	Core Agent & Project Lead/ECIWIB	16 hours	NA
Website Development	8/31/05 – 9/16/05	Website Consultant	80 hours	SSI Website
Development of County Level and Regional Occupational Information and Skill Shortages – Actual & Projected	Upon hiring – 9/16/05	Project Lead/ECIWIB – Workforce Associates - BSU - ERRIS	70 hours	County Level and Regional Information
Staff Training on Website Use	9/16/05 – 10/5/05	Website Consultant	16 hours	Staff capacity for Website posting

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PHASE ONE – RESEARCH & ID PHASE				
Project Activity	Timeline	Staff-Agency Responsible	Effort/Work Hours	Product Produced
Labor Force Skill Analysis - WorkKeys	9/19/05 - Ongoing	SSI Support Staff	10 hours/week	County and Regional Analysis of WorkKeys Skill Sets
Posting of Data Presentation on Website	9/19/05	Project Lead/ECIWIB	8 hour	Public Availability of Data
Content Development/Analysis of Executive and Sector Interviews/Surveys	9/19/05 – 10/5/05	Project Lead & Support/ ECIWIB – BSU – Workforce Associates	40 hours	Survey and Interview Instruments
Nine county level education and input forums	9/19/05 – 10/5/05	Project Lead & Support/ ECIWIB – BSU - Consultant	120 hours	Broad based input on data presentation. Identification and collection of existing plans.
Posting of Input on Website	9/19/05 - Ongoing	Support Staff/ECIWIB	8 hours/week	Public Availability of Data and Input
Participate in Shortages Report Workshop/Webinar	9/27/05	Core Agent & Project Lead/ECIWIB – BSU	4 hours	Expand understanding and skills related to completion of Shortages Report
Begin Focus Groups/Business Roundtables	9-29-05 - Ongoing	Project Lead/ECIWIB - Consultants	120 hours	Primary research information on skill shortages and root causes
Workforce Summit – Strategic Skills Initiative	10/6/05	Graham Toft and Project/Lead/ECIWIB	20 hours	Raising the level of awareness of importance of Regional economies.
Compilation of Occupational Skill Shortages Research & ID Phase Research and Input	9/19/05 – 10/12/05	Project Lead/ECIWIB - BSU	80 hours	Draft Occupational Skill Shortages Report

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PHASE ONE – RESEARCH & ID PHASE				
Project Activity	Timeline	Staff-Agency Responsible	Effort/Work Hours	Product Produced
Develop criteria for use in selection of key industries/clusters of industries	9/19/05 – 10/12/05	Project Lead/ECIWIB – BSU – Executive Team - Consortium	16 hours	Criteria for use in Selection of key industries/clusters of industries
Determination of companies and individuals to be interviewed.	9/19/05 – 10/12/05	Core Agent & Project Lead/ECIWIB – Consortium and E-Team	16 hours	Targets for scheduling interviews.
Post Draft Occupational Skill Shortages on Website for Input	10/12/05	Support Staff/ECIWIB	3 hours	Public Availability of Draft Occupational Skill Shortages Report
Review and input on Draft Report	10/12/05 – 10/14/05	Consortium/Executive Team/Workforce Associates	24 hours	NA
Compile input	10/17/05	Project Lead & Support/ECIWIB	8 hours	NA
Plan Review and Approval	10/18/05	Executive Team	4 hours	NA
Final Occupational Skill Shortages Report	10/19/05 – 10/20/05	Project Lead/ECIWIB - BSU	32 hours	Submission of finalized Occupational Skills Shortages Report
Post Final Occupational Skills Shortages Report on Website	10/21/05	Support Staff/ECIWIB	3 hours	Public Availability of Occupational Skill Shortages Report

Eastern Indiana Region 6 Strategic Skills Initiative

PHASE TWO – ROOT CAUSES PHASE				
Project Activity	Timeline	Staff-Agency Responsible	Effort/Work Hours	Product Produced
Determination of tentative occupational skill shortages based upon Occupational Skill Shortages Report	10/21/05 – 10/31/05	Core Agent & Project Lead/ECIWIB – Consortium and E-Team	16 hours	Listing of Occupational Skill Shortages for phase two focus – pending SSI Team Approval
Receipt of SSI scoring and feedback, modify targeted skill shortages and interviews accordingly.	11/1/05 – 11/4/05	Core Agent & Project Lead/ECIWIB – Consortium and E-Team	12 hours	Finalized interview list
Participation in IWD Web-based Workshops	10/31/05 - Ongoing	Core Agent & Project Lead/ECIWIB	As scheduled	Increased skills and understanding
Post Executive/Sector Interview on Website	11/7/05	Support Staff/ECIWIB	3 hours	Electronic Executive Interview Input Option
Conduct Face to Face Executive/Sector Interviews	11/7/05 – 11/22/05	Consultants	120 hours	Report on Executive Interview on Root Causes, including information on recruitment and retention.
Participate in Root Cause Report Workshop/Webinar	11/17/05	Core Agent & Project Lead/ECIWIB – BSU	4 hours	Expand understanding and skills related to completion of Root Cause Report
Conduct focus groups/business roundtables with various sectors – COC, LEDOs, Education, Labor, Service Providers, businesses, workers, students, etc.	11/7/05 – 11/20/05	Project Lead/ECIWIB	80 hours	Report on Sector input on Root Causes, including information on capacity, barriers and opportunities.
Compilation of Root Cause Phase Research and Input	11/21/05 – 11/30/05	Project Lead/ECIWIB - BSU	80 hours	Draft Root Causes Report

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PHASE TWO – ROOT CAUSES PHASE				
Project Activity	Timeline	Staff-Agency Responsible	Effort/Work Hours	Product Produced
Develop criteria for use in evaluation of importance, return on investment in addressing skill shortages, and other factors in ranking Root Causes	11/21/05-11/30/05	Project Lead/ECIWIB – BSU – Executive Team - Consortium	16 hours	Criteria for use in prioritization of root causes
Post Draft Root Causes Report on Website	11/30/05	Support Staff/ECIWIB	3 hours	Public Availability of Root Causes Report for Input
Review and input on Draft Root Causes Report	12/1/05 - 12/07/05	Consortium/Executive Team/Workforce Associates	24 hours	NA
Compile input	12/08/05	Project Lead/ECIWIB	8 hours	NA
Root Causes Report Review and Approval	12/12/05	Executive Team	4 hours	NA
Final Root Causes Report	12/13/05 – 12/14/05	Project Lead/ECIWIB - BSU	32 hours	Submission of finalized Root Causes Report
Post Final Root Causes Report on Website	12/15/05	Support Staff/ECIWIB	3 hours	Public Availability of Root Causes Report

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PHASE THREE – SOLUTIONS PHASE				
Project Activity	Timeline	Staff-Agency Responsible	Effort/Work Hours	Product Produced
Conduct Strategic Planning Workshop	1/2/06-1/16/06	Core Agent, Project Lead & Support Staff/ECIWIB Executive Team Consortium Consultants	80 hours	Examination and Prioritization of Root Causes as basis for developing Solutions Report .
Post results of Strategic Planning Workshop on Website	1/30/06	Project Lead/Support Staff/ECIWIB	5 hours	Public availability of results of Strategic Planning Workshop
Review and input on Prioritization and Recommendation for Root Causes Report	1/31/06 – 2/3/06	Consortium/Executive Team/Workforce Associates	24 hours	NA
Participate in Solutions Report Workshop/Webinar	2/1/06	Core Agent & Project Lead/ECIWIB – BSU	4 hours	Expand understanding and skills related to completion of Causes Report
Compile input	2/6/06 – 2/7/06	Project Lead/ECIWIB	12 hours	NA
Solutions Report Review and Approval	2/13/06	Executive Team	4 hours	NA
Finalize Solutions Report	2/13/06 – 2/16/06	Project Lead/ECIWIB - BSU	32 hours	Submission of finalized Solutions Report
Post Final Solutions Report on Website	2/17/06	Support Staff/ECIWIB	3 hours	Public Availability of Solutions Report

Eastern Indiana Region 6 Strategic Skills Initiative

Strategic Skills Initiative Research & ID Grant
Line Item Budget Request

Economic Growth Region # 6 : Eastern Indiana Economic Growth Region

ITEM	AMOUNT REQUESTED
1. Staff Costs	\$ 98,146
2. Consultant Assistance	\$ 137,736
3. Travel Expenses	\$ 5,000
4. Other Expenses	\$ 62,699
TOTAL REQUEST	\$ 303,581

- 1. Staff Costs:** Prorated wages and benefit costs for that portion of time staff actively work on the project. Staff time charged to the project must be documented (i.e. time sheets).
- 2. Consultant Assistance:** Costs for consultants assisting with the project. Include both consultant fees and expenses here. Please note that contracts for consultant services must meet all applicable state and local procurement requirements
- 3. Travel Expenses:** Transportation (i.e. mileage), lodging, and meals (or Per Diem) costs for staff and other personnel (excluding consultants) participating in the project.
- 4. Other Expenses:** Include costs such as: meeting room costs; purchase of data, reports, and materials; data processing fees; and printing expenses.

***NOTICE:** Attach a detailed justification for all requested costs by line item. The justification must explain what is being requested in relation to the work statement, as well as the “reasonableness” of the amount being requested – this is a critical piece that must be well developed in order for the state to determine final funding levels.

Eastern Indiana Region 6 Strategic Skills Initiative

BUDGET REQUEST
Strategic Skills Initiative Research & ID Grant
Line Item Justification

STAFF COSTS:		<u>\$ 98,146</u>
<u>Salaries and Wages:</u> ¹		
Project Analyst:	\$29,167	
Project Assistant	\$13,868	
Core Agent:	\$23,678	
Controller:	\$ 1,551	
Financial Coordinator:	<u>\$ 804</u>	
Total Salaries and Wages:	\$ 69,068	
<u>Fringe Benefits:</u> ²		
FICA @ 7.65%		
WC @ .32%		
UI @ 3.9% of first \$7000 wages/person		
Cafeteria Benefit @ 13.5%		
Health Insurance @ \$309.13/month		
Life @ \$4.80/month		
Disability @ \$6.00/month		
Retirement @ 2.5%/month		
Total Fringe Benefits:	<u>\$ 29,078</u>	
CONSULTANT ASSISTANCE: ³		<u>\$ 137,736</u>
Barkey Consulting – Pre-application	\$ 4,500	
Ball State University		
Bureau of Business Research		
Project Technical Assistance	\$17,832	
Wage & Fringe Benefits Survey	\$20,000	
Workforce Associates	\$ 9,950	
ERRIS Job Vacancy Survey	\$13,455	
Consulting/Professional Services	<u>\$72,000</u>	
TRAVEL EXPENSES: ⁴		<u>\$ 5,000</u>
Travel	\$ 4,000	
Per Diem & Lodging	<u>\$ 1,000</u>	
OTHER EXPENSES: ⁵		<u>\$ 62,699</u>
Equipment & Software	\$18,678	
Printing and Duplication	\$ 5,000	
Consumable Supplies	\$ 1,000	
Meeting Supplies (Forums, Focus Group, & Summit Business Roundtables)	\$ 3,500	
Publications	\$ 1,000	
Recruitment & Advertising	\$ 7,500	
Staff Development (EDA/Trng, & Conf)	\$ 2,000	
Communication Costs	\$ 2,100	
Copying	\$ 1,200	
Allocable Costs	<u>\$ 20,721</u>	
GRAND TOTAL		<u>\$ 303,581</u>

Eastern Indiana Region 6 Strategic Skills Initiative

¹ The East Central Indiana Workforce Investment Board, Inc. has one full-time staff person and does not have the capacity to have current staff complete the work entailed with this project. This application proposes to hire staff specifically to complete the work of this initiative. This amount represents 100% of the cost of a full time Project Lead/Analyst and Project Assistant beginning in mid August 2005 and the direct time of the ECIWIB Executive Director in the role of Core Agent, which is projected at 50% beginning July 1, 2005. In addition there is approximately 5% of the time of the Controller and Financial Coordinator with the Grant Receiving Organization to fulfill the accounting, reporting, property and audit functions associated with this grant. The time charged by the latter three staff will vary based upon the time spent on the project during a particular reporting period.

² Each full time staff is eligible for fringe benefits and the proportionate share of that cost is included.

³ At this time it is unknown what the level of staff expertise will be realized with the new hires. The Project Lead/Analyst and Project Support Staff will complete the basic work of the project, including data collection and analysis, report writing, communications and logistics for the forums, focus groups, business roundtables, executive/sector interviews, website maintenance, etc. Both staff members are expected to be engaged in a steep learning curve. For this reason they will be supported by seasoned staff, technical staff and targeted expertise through consulting contracts.

Barkey Consulting – Through this Sole Source contract (\$4,500) Dr. Patrick M. Barkey has agreed to assist the Executive Team and ECIWIB, Inc. in consulting and writing the pre-application for the Research & ID Grant. He will also assist with the recruitment and hiring of the Project Lead/Analyst and provide some day-to-day technical guidance and assistance to that staff once hired. In the meantime, in order to meet the timelines of the grant application, Dr. Barkey will begin the preparation of the presentation to be made at the initial forums to begin in mid September.

Ball State University – Bureau of Business Research – The Executive Team views the partnership and collaboration with Ball State University as a powerful catalyst to the success and sustainability of this project. As such, the Ball State University Bureau of Business Research, through assignment to Dr. Patrick M. Barkey, has been identified as the Sole Source contract for this work. See Page 20 for further explanation. Dr. Barkey will provide technical guidance, direction and oversight to the Project Staff, Executive Team and Consortium within the context of Workforce Associates guidance. The Executive Team anticipates after the life of this contract that Ball State University will remain in partnership with Region 6. This portion of the BSU contract is in the amount of \$17,832. A continuing concern and consideration with the high cost of health care in the Region is the total compensation package for employment, i.e. wages plus benefits. This sole source contract with Ball State University will be for the purpose of developing primary research of the wages and fringe benefits compensation in the Region. While structured by county so it can have a local value, the resulting data will be sortable and available by Region or subparts. The results of this survey will be available at a fee, which will be used to sustain this initiative in the future. The cost of the Wage & Fringe Benefits survey is \$20,000 for a total contract amount of \$37,832.

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Workforce Associates: Procured at the State level and authorized for use by Indiana Workforce Development at a set price of \$9,950, the services of Workforce Associates will be used as widely as permitted in the development of Project Staff and others in better understanding how to use the available data and tools.

ERRIS: Procured at the State level and authorized by Indiana Workforce Development at a set price of \$13,455, Region 6 will enter into a contract with ERRIS to complete the Job Vacancy Survey for the Region.

Consulting/Professional Services: The skills of the Project Staff will be supplemented by experts from a number of disciplines. These individuals/firms will be procured within State parameters and according to the approved procurement policies and procedures of the East Central Indiana Workforce Investment Board, Inc. Overall the cost of these vendor agreements is projected at \$72,000. The following provides rough estimates of how we arrived at that projection.

Website Design: Includes the development of a website designed to serve the information/data sharing needs of the Strategic Skills Initiative. The website will also be the platform for gaining broad based input from various industry, labor force and other sectors that choose to provide input at a time of their own choosing as opposed to other methods such as business roundtables, focus groups, and executive interviews. The procurement is anticipated to include the training of Project Staff so that the ability to upload information onto the website is internalized. The projected cost of this contract is not expected to exceed \$9,000.

Forum/Focus Group Presentations: Early observations of the Executive Team have led to the determination that some education will be required in order to increase the receptivity of local communities and their stakeholders. The education will be aimed at establishing the need for communities to make a change and the advantages of working together as a Region in order to stabilize and reverse the trends plaguing the community and Region. The projected cost of this contract is not expected to exceed \$9,000.

Executive Interviews: During the primary research in Phases I & II of this initiative, industry specific consultants will be utilized to conduct Executive Interviews, either one on one or through Business Roundtables. There are expected to be a minimum of five interviews conducted in each County with ten interviews conducted in Delaware, Henry and Wayne counties for a total 60 interviews. These interviews will be conducted based upon the skill shortage analysis and in tracing root causes of those skill shortages. Interviews will be conducted with business, education, labor and other relative sectors. The projected cost of this contract is not expected to exceed \$25,000.

Worker/Student Interviews/Survey: During the primary research in Phases I & II of this initiative, incumbent worker, job seeker and student interviews will be conducted. There is expected to be a minimum of 20 interviews per county with 40 interviews in Delaware, Henry and Wayne counties for a total of 240 interviews. The projected cost of this contract is not expected to exceed \$14,000.

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Strategic Planning Retreat: At the conclusion of Phases I & II determinations need to be made based upon the Primary and Secondary research. In order to be as inclusive as possible a Regional Strategic Planning Retreat will be held. An expert will be retained in order to facilitate the retreat and write the report. The results of the Retreat will be the basis of the Phase III Solutions Report. The projected cost of this Retreat and the Consultant is not expected to exceed \$15,000.

⁴ The costs associated with the mileage reimbursements, per diem and lodging will be for Project Staff. The travel is expected to primarily be within the Region, however, some travel and associated costs of per diem and lodging will be to attend training and conferences.

⁵ The other costs associated with this project requiring justification/explanation are detailed below.

Equipment & Software: Includes two laptop computers and docking stations for the new staff at a projected total cost of \$5,200. Additional equipment includes two LCD projectors (\$2,000) for staff and consultant use in forums, focus groups, business roundtables, etc. In support of the project and staff needs other equipment to be purchased includes two office workstations (desks/chairs/file cabinets) and a scanner (\$2,250). All of these items are subject to procurement and tagging according to state guidelines. Specific software, beyond the MS Office Suite software included with the computers includes IMPLAN (\$1,600), SAS (\$7,228) and Adobe Acrobat Professional Version 7 (\$400). IMPLAN gives a great deal of detail about wages and employment by county and in particular comes with a great deal of Indiana data. SAS will be used by the Project Lead/Analyst in his/her data analysis. This software is used by those who deal with large amounts of data and will make the capabilities of the Project Lead/Analyst compatible with Ball State University Bureau of Business Research. The Adobe Acrobat Professional Software will allow for the editing of files and the posting of PDF files on the Region 6 SSI website.

Printing and Duplication: In-house and external costs associated with the printing and duplication of the information and reports (hard copy and CD) developed throughout all phases of the Project. The cost is not expected to exceed \$5,000.

Consumable Supplies: Costs associated with the consumable supplies needed for staff and activities associated with the Project which are not expected to exceed \$1,000.

Meeting Supplies: Costs associated with the county level forums, focus groups, business roundtables, Consortium, Executive Team and other meetings related to this Project. In support of the costs associated with 40-50 events the projected cost is \$3,500.

Publications: Costs of publications needed by Project Staff related to conducting the work of the Project. \$1,000 has been budgeted for these resource materials.

Recruitment & Advertising: Costs associated with the recruitment of staff and informing individuals of community level forums, focus groups and business roundtables. \$7,500 has been budgeted for the required advertising and other recruitment costs expected to cover radio and newspaper media.

Staff Development: Costs associated with the education and training of staff in areas and skills required for them to conduct their work. Examples may be Economic

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Development Academy, use of SAS, IMPLAN, Access, etc. The cost is projected at \$2,000 and will be dependent on the experience and skills of the staff that are hired.

Communication Costs: The costs associated with postage, telephone service, long distance and conference calls. The total of \$2,100 is allocated \$1,100 to telephone and \$1,000 to the cost of postage.

Copying: The costs associated with equipment lease, copying and maintenance related to the Project. The projected cost is \$1,200.

Allocable Costs: Allocable Costs are the indirect costs that are a) incurred for a common or joint purpose benefiting more than one cost objective; and b) not readily assignable to the various cost objectives without effort disproportionate to the results achieved. Indirect costs are charged to a cost pool for subsequent allocation based upon the approved Cost Allocation Plan. While difficult to project, the allocable costs are projected to be \$20,271.

Attachments

POSITION DESCRIPTION

Project Lead/Analyst

FLSA Status: Exempt

I. JOB OBJECTIVE:

Position is responsible for performing, reporting, and presenting the results of statistical analysis of labor market and workforce trends and conditions of the 9-county Economic Growth Region of east central Indiana. Incumbent will utilize various methods for gathering the data to be used in performing the analysis and presenting the information in various formats. The incumbent will work with a team to identify existing and projected skill shortages, determine root causes and to determine best course(s) of action to address them. The incumbent will also be responsible for coordinating the work of consultants and other staff related to this Strategic Skills Initiative. The ideal candidate will be one who is detail-oriented, communicates well, and who can perform well in a self-directed environment.

II. JOB FUNCTIONS: *These functions define the parameters of this position. Some functions may not be implemented based upon current operating conditions.*

1. Become familiar with East Central Indiana Workforce Investment Board's (ECIWIB) overall philosophy, goals, objectives, applicable regulation, policies and procedures in order to develop an understanding of job and how position duties relate to the broad level and assure all activities are consistent with such and lead to their achievement.
2. Become familiar with the State Strategic Skills Initiative philosophy in order to develop an understanding of how position relates to the State Initiative, and the goals and objectives of the Region 6 Economic Growth Executive Team and Consortium and assure all activities are consistent with such and lead to their achievement.
3. Become familiar with and adhere to federal, state and local regulations, policies, plans and procedures that govern how, what and when work is to be completed.
4. Fulfilling the requirements of the Corporation related to the State Strategic Skills Initiative.
5. Responsible to prepare reports on the labor market and workforce projections, determine trends, and identify opportunities with training and technical assistance from subject matter experts.
6. This position requires the incumbent to perform tasks related to the State Strategic Skills Initiative throughout the Region such as, presenting at county level forums and focus groups on labor market findings, importance of regional cooperation, and gathering input by communicating, facilitating input and listening effectively.
7. Responsible to function as a contributing member of the SSI project management team, Executive Team and Consortium.
8. Responsible to act as the lead in drafting reports, plans, survey and interview instrument content.

The statements contained within this position description describe the scope of the responsibility and essential functions of this position, but should not be considered to be an all-inclusive listing of work requirements. Individuals may perform other duties as assigned including work in other areas to cover absences or otherwise balance the workload.

9. Responsible to assist as requested with planning and implementation of project objectives.
10. Responsible to assist in procurement of and management of the work of contracted consultants.
11. Responsible to assist in the conduction of industry and other sector surveys and interviews as requested.
12. Responsible for the completion of necessary forms, paperwork and reports in order to manage project for achievement of goals.
13. Responsible to maintain systems which provide an organized and written audit trail.
14. Responsible for clerical support to self.
15. Responsible to travel outside the office as required.
16. Responsible to project a professional image in manner, appearance and product.
17. Responsible to report any potential audit problems and/or financial inconsistencies to the Executive Director.
18. Responsible to work in a team situation for achievement of the common goals of the Corporation, and the Strategic Skills Initiative.

III. JOB STANDARDS

Qualified candidates will possess an undergraduate degree in economics or a related field, demonstrated computer skills, and at least one year of experience

- Four years specialized training beyond high school in Economics, Business Administration, Statistics, Planning or Public Administration.
- One year successful experience in with empirical research projects required.
- Experience with MS Office and statistical and data management software.
- Report writing a plus.

Substitution: Up to one year of post-secondary education may be substituted with successful related experience on a two years experience-for-one year education basis.

IV. EQUIPMENT: In performing duties incumbent will use calculator, network computer terminal, personal computer, laptop and projector equipment, copier, fax machine, typewriter, postage meter, and telephone.

V. PERSONAL RELATIONSHIPS: Incumbent formally reports to the ECIWIB, Inc. Director and is provided technical work product and methodology supervision by the Ball State University Bureau of Business Research. Incumbent supervises no one although oversees the work of consultant contracts and works in team environment with Core Agent, Ball State University Bureau of Business Research, Workforce Associates and Project Support Staff. Incumbent has contact with superiors, Project Executive Team, Project Consortium, co-workers, WIB Board Members, Local Elected Officials, employers, partnership organizations, general public, vendors/suppliers, auditors and monitors.

The statements contained within this position description describe the scope of the responsibility and essential functions of this position, but should not be considered to be an all-inclusive listing of work requirements. Individuals may perform other duties as assigned including work in other areas to cover absences or otherwise balance the workload.

VI. WORKING ENVIRONMENT: Job is performed frequently in a modern office environment where no unusual physical requirements occur. Job functions also require traveling to locations throughout the Region and to meetings, conferences and training both in-state and nationally. The position also requires frequent mobility to conduct forums, make presentations, access files and lift moderate amounts of material for storing, filing, and delivery.

POSITION DESCRIPTION

Project Assistant

FLSA Status: Non-exempt

III. JOB OBJECTIVE:

Incumbent is responsible for assisting in all aspects of Strategic Skills Initiative Project. As support staff to this project incumbent will be the primary point of contact for organizing, implementing, maintaining and overseeing the communications systems of the Project. Incumbent provides administrative support to the Project Lead and Consultants. Incumbent will function as the technical expert to create and edit work products in various software for final publication and website posting.

IV. JOB FUNCTIONS:

1. Become familiar with East Central Indiana Workforce Investment Board's (ECIWIB) overall philosophy, goals, objectives, applicable regulation, policies and procedures in order to develop an understanding of job and how position duties relate to the broad level and assure all activities are consistent with such and lead to their achievement.
2. Become familiar with the State Strategic Skills Initiative philosophy in order to develop an understanding of how position relates to the State Initiative, and the goals and objectives of the Region 6 Economic Growth Executive Team and Consortium and assure all activities are consistent with such and lead to their achievement.
3. Become familiar with and adhere to federal, state and local regulations, policies, plans and procedures that govern how, what and when work is to be completed.
4. Fulfilling the requirements of the Corporation related to the State Strategic Skills Initiative.
5. Responsible to develop, implement and maintain database for internal and external communications.
6. Responsible to develop, implement and maintain communications systems for the Strategic Skills Initiative, including Management Team, Executive Team, Consortium, Consultants, Focus Groups, Forums, etc.
7. Responsible to make arrangements for Project meetings (Executive Team, Consortium, Forums, Focus Groups, Business Roundtables, and Retreats) including assisting in conducting the mailings, preparing materials, confirming attendance, arranging for refreshments, and ensuring Open Door requirements are met.
8. Responsible to attend forums, focus groups, meetings, retreats, etc. as assigned to assist in taking minutes and recording input.
9. Responsible for creating and editing reports, presentations, surveys and interview instruments using various software, as well as posting to website.
10. Responsible to perform support duties for the Project Lead/Analyst, Core Agent and Consultants as assigned.
11. Responsible to assist with internal and external Public Relations activities as requested.

The statements contained within this position description describe the scope of the responsibility and essential functions of this position, but should not be considered to be an all-inclusive listing of work requirements. Individuals may perform other duties as assigned including work in other areas to cover absences or otherwise balance the workload.

12. Responsible for the maintenance of filing systems as assigned.
13. Responsible to maintain systems which provide an organized and written audit trail.
14. Responsible for clerical support to self.
15. Responsible to travel outside the office as required.
16. Responsible to project a professional image in manner, appearance and product.
17. Responsible to report any potential audit problems and/or financial inconsistencies to the Executive Director.
18. Responsible to work in a team situation for achievement of the common goals of the Corporation, and the Strategic Skills Project.

VII. JOB STANDARDS

- Two years specialized training beyond high school in Business or Management related field.
 - Two years successful experience in office environment which included public contact.
 - Proficiency in MS Office required.
 - Experience with MS Access, Publisher, Adobe Acrobat and Website postings a plus.
- Substitution: Post-secondary education may be substituted with successful related experience on a two years experience-for-one year education basis.

VIII. EQUIPMENT:

In performing duties incumbent will use calculator, network computer terminal, personal computer, laptop, video conferencing equipment, copier, fax machine, scanner, typewriter, postage meter, and telephone.

IX. PERSONAL RELATIONSHIPS: Incumbent formally reports to the ECIWIB Director. Incumbent supervises no one but must work in a intra and inter organizational team environment. Incumbent has contact with superiors, co-workers, Fiscal Agent staff, Executive Team, Consortium, Consultants, general public, vendors/suppliers, auditors and monitors.

X. WORKING ENVIRONMENT: Job is performed frequently in a modern office environment where no unusual physical requirements occur. Job functions also require traveling to locations throughout the Region, state offices and vendors. The position also requires frequent mobility to access files requiring standing, stretching, climbing, and lifting moderate amounts of material for storing, filing, and delivery.

The statements contained within this position description describe the scope of the responsibility and essential functions of this position, but should not be considered to be an all-inclusive listing of work requirements. Individuals may perform other duties as assigned including work in other areas to cover absences or otherwise balance the workload.

**REGION 6
STRATEGIC SKILLS INITIATIVE
EASTERN INDIANA ECONOMIC GROWTH REGION
PLANNING GRANT APPLICATION AND BUDGET
Summary of Comments**

Background: On Tuesday, July 26, 2005, the Core Agent advised the Eastern Indiana Economic Growth Region's Consortium of the timeline for the release of the draft Planning Application and Budget for the Region 6 Strategic Skills Initiative. Comments were requested to be submitted not later than Monday, August 1, 2005, at 2:00 PM. The following is the summary of **Comments** received. The **Responses** represent the modifications made to the Planning Grant Application and Budget, if any, as a result of the comment.

Comment:

To me your plan looks real good. It covers most all bases. I want to personally thank you for the piece on labor, I really appreciate that. It may be overlooked by most but not me. I am having one real problem with the whole concept though. How can we develop a plan to improve skills for jobs that don't exist? I know that health care skills are in demand but in Rand Co we don't have enough jobs to put our kids to work after graduation. If we educate them for jobs in demand in say Madison Co we are still going to lose tax payers in Rand Co. I feel like we have the cart before the horse. If we could develop a plan to bring jobs to our area and then educate citizens to fill them it would be more successful.

Response:

Good point. The narrative has been adjusted to include an analysis of not only the weaknesses, but the strengths of the Region, including underutilization of existing skill sets. From this primary research data we will be able to examine the root cause and solution within the context of a demand driven system.

Comment:

Looks good to me - don't have anything to add at this time. Just one question - on the Phase Three Solution Phase the timeline listings have several Jan & Feb 2005 dates. Should that be 2006?

Response:

Error corrected.

Comment:

I have no changes to make. GREAT JOB!

Response:

None required.

Comment:

I looked over the documents and both look good. I realize an executive group can not represent everyone but I think you have missed a significant service provider when you don't have anyone representing Adult Basic Education and vocational education. The new region 6 has 4 area vocational schools. Three provide secondary vocational education, adult basic education, and adult education classes to business and the general community. Richmond has two separate programs for ABE and vocational education. My personal feeling is ABE will be facing a huge change if the President gets his way and ABE funding is eliminated from federal funding. I really think this will happen. This is

about 1/3 of my funding and I assume a similar amount for the others. Should this be there will be huge changes in ABE as we know it.

A majority of vocational students remain in the community, go directly into the workforce, participate in postsecondary education, and or apprenticeship training while working full time. These are the populations this grant is aimed at serving and the group that provides current services.

Response:

The names of the referenced vocational providers have been solicited for issuance of an invitation to participate in the consortium. There was only one missing. The names of the Adult Education Providers will be generated for use in county forums and focus groups. The other concerns, while valid are more related to root causes and solutions and therefore no plan adjustments have been made.

Comment:

You have my approval to submit. Thanks for all of your hard work

Response:

None required.

Comment:

In response to your request for comments on the SSI draft plan, I have only one major concern with the plan as written. The second paragraph on page 6 states that "the Consortium membership does not contain Service Providers..." Unless I completely misunderstand what is meant by the term "Service Providers" I represent a Service Provider (Ivy Tech Community College), yet I have been invited to be a member of the Consortium. Therefore either the statement as written is in error, or indeed I should not be serving as a member of the Consortium.

Questions 8 and 9 of the SSI FAQs indicate that Service Providers may not be part of the Executive Team, but may be members of the Consortium with the following qualification: "but it is not recommended for early stages of report development (i.e., Shortage or Root Cause Report)."

If it would avoid any potential perception of--or real--conflict of interest situation, or better serve the initiative if I were to not serve as a member of the Consortium, please feel free to remove me from the Consortium membership.

Response:

Clarification was sought from Andrew Penca on the concern and it was verified that the "Service Provider" terminology contained in the FAQs refer to the Title I WIA provider, not those providing training by referral. Care will be taken during the Research and ID Phase to assure that "no matter who is involved in the identification phase, their input into the process does not bias the direction of the project. Ideally, those individuals who are involved in this process from the educational side of the coin, will get an early look at what the most critical shortages are in the workplace and take those back to their respective institutions to begin driving reform/change in curricula and delivery of services."

Comment:

I have reviewed the draft plan for the Region 6 Strategic Skills Initiative and I do not have any suggestions or changes. You did a great job in putting all of this together. Thank you!

Response:

None Required.

Comment:

Will be off Aug 1; reviewed Executive Summary; support the concept and plan.

Response:

None Required.

Comment:

Looks good. Very well done.

Response:

None Required.

Comment:

I had the opportunity to read through the exec summary and planning grant application this weekend. I commend and support this effort. Good job.

Response:

None Required.

Comment:

I have reviewed and made some comments (in "track changes" form) on the attached documents, the Executive Summary and the Application Draft #3. Fundamentally, I think the approach is sound. I would suggest:

1) considering a more institutionalized approach to generating "buy-in" among regional stakeholders: I am concerned about the process culminating in a one-day workshop (only). In my experience, workshop participants give their input then go about their business. A more rigorous plan development process with individuals (volunteers) agreeing to long term stewardship of some kind might help leverage the plan's effectiveness,

2) taking another look at the somewhat "accepted" approach of identifying gaps and developing a plan to fill them. I am concerned (perhaps unjustly so) that our employer mix en masse simply lacks the dynamism to create significant new jobs in any meaningful and sustainable manner. Perhaps there are other approaches we can weave into the process, particularly if the research suggests that the filling the "gaps" represents an insubstantial method of growing the regional economy (and we must be open to accepting this finding if it exists). "Top of the head: examples might include such alternative strategies as entrepreneurialism, attraction of employers who can capitalize on existing skill base(s), and adoption of wholly new ways to look at the economy through such means as visitor attraction, retiree housing, non-profit enterprise opportunities,

3) Finally, I observed that the plan appeared to be focused on identifying and addressing the weaknesses (see first tracked changes) without similar emphasis on identifying ways to capitalize on the strengths.

Response:

Language suggestions have been incorporated into the Planning Grant Application. The suggestion to attain Executive buy-in has been incorporated into the Executive Interviewing process. # 2 is a good comment, however should become a part of the Root Causes and Solution Phases. No change was made in the Planning Grant Application accordingly. #3 is a good comment. The Planning Grant Application has been adjusted to reflect a review of the strengths as it relates to demand driven analysis.

Comment:

I am replying to my review of the SSI Initiative Grant. It was a good read. Upon review I am totally in agreement with the contents. It is my hope that myself and Whitewater Technical Career Center can be of further service. Located in Fayette County (leading unemployment rate for the new Region 6, May 7.2) we have a vested need for helping our community. I shall await further service.

Response:

None Required.

Comment:

It took more than a moment to read the attached word documents. It all seemed very organized and easy to follow. I only found one confusing statement. On page one of the Planning Grant Applicant and Budget Draft #3 in the last paragraph number 1 - Where are the skills shortages and how large are they-actual and projected-existing industries and emerging? This seemed confusing to me. in existing and emerging industries? I am sure you have discovered than on page 2 seven lines from bottom ...that its destiny can to positively..... Probably mean can do.

Response:

The latter correction was made. The former comment is on language that was purposefully written and was determined to remain. The intent is to analyze the existing and future jobs and skill shortages as they exist today or are projected to exist in the future. Emerging industries will likely have skill shortages.

Comment:

I read the plan proposal and aside from stylistic items I think it is a good application. I support the specific plans outlined in the proposal, they make sense. Thanks for letting me take a look.

Response:

None Required.

Comment:

This is an aggressive well thought out plan. Great work.

Response:

None Required.

Comment:

*Given the short turnaround allowed for our response, I will limit my remarks as follows:
Page No. 6 of the "Project Overview"*

A reference is made to "Key Cluster & Competition Analysis"

The most recent data I am aware of show that Indiana has one (1) legitimate industry cluster and that is the biomedical in Warsaw.

Question: *If we are to analyze these clusters, where are they??*

Private Sector

The draft does recognize the absence of solid private sector involvement on page 12, however, I believe it's needed up front. Since the late 70's every workforce program (CETA,

JTPA, WIA, etc) has lacked industry representation and I believe that is why we continue to struggle knowing where the skill shortages are, why they are there and how do we address them.

If this is to be a plan to plan let's make sure we have the major players there at the beginning.

Conclusion

We have an uphill battle to get these nine (9) counties to function as an effective region.

Response:

Cluster Analysis comment is a good one. While no adjustment was made to the plan, the consortium will need to carefully examine the approach to this research based upon this and other comments. Affirming the concern of this commenter and another on private sector involvement, adjustments have been made in the commitment requested during the Executive Interview process. Acknowledging the challenge to form a cohesive Region, no changes to the Planning Grant Application as the foundation has hopefully been laid out to achieve this goal.

Comment:

Sorry to squeak in at the last minute, but after reviewing the material this morning, I think all looks okay. One budgetary note- \$4500 for advertising will go very quickly if utilizing newspaper print and radio air time. When you divide that among 9 counties- just a thought. If there is a little more room in the budget, maybe a little more could be shifted there. Looks like you've all been very busy! Nice job!

Response:

The budget for the advertising budget to raise awareness and get individuals engaged has been increased from \$4,500 to \$7,500.

Comment:

I have reviewed your executive Summary and Planning Grant. Both have been well thought out and have many elements of merit. I am not sure how to add to your information, so I will comment on the experiences I have with the labor force and economic progress.

We are in a situation in our labor force that has been let go too long. So the correction to bring lasting change will not be brought about overnight.

I interview many people over the course of a year, which have varied backgrounds and education. The people who have goals and vision and have spend time investing in useable skills; will go where there are opportunities. As a region we have to continue to attract new employers and invest in our children. This is the fix we have all been confronted with as a residence and business people. The comments I hear from others are that we do not have the resources, that we are in a catch 22" too many needs, not enough money; we have nothing to offer to attract new business. All of these comments come from lack of leadership and short slightness. We have a lot of people who need better glasses. Times have always been challenging when it come to the right mix of skilled people and with the right amount of jobs available. We live in a world of supply and demand. It is my opinion that the leaders of today are responsible for the out comes of tomorrow. We can do so many things to help our problems and regain a stable and healthy economy.

My thoughts on the plan of action: Create a tax incentive for business to train the work force. We have training grants from the state but it is based on the worker, why not lobby to train workers in your county of business. We have successful intern ship programs that the high schools have used to partner with businesses, why not make it mandatory to work in your community for 6mos to a year if they are given special funds to be in these programs. We seem to have great beginnings with lots of efforts spent

To start effective partnerships but we fall short of the follow through. The point I am trying to make is we do a lot of the right things, and we have come up with a lot of good solutions in the passed, still we fall short of successes because we are not committed to the long haul. I do not want to see another planning grant buried on a shelf after everyone evolved has had there name, expertise and note worthy comments publicized.

I see there is an attempt to bond the participant to the program in some way and take ownership of their ideas, this is very good, but I do not see estimated timelines for the implementation and long range commitment on how we will maintain this initiative. I would also like to see students take part in this effort since in many ways we are talking about their futures.

These could be seniors in High School and seniors in College. The messages from these two groups may be very interesting and important to the long range out comes.

This a focused grant for a particular region, on Question # 3, first page of the grant, you have given us too much work to do, contributing to he health of the economy on a national basis, maybe we could just adjust our sights to the region, of course good things happening at home can have far reaching impacts, I just think it is over stated.

You have education on board; I would challenge those from that sector to think of the smaller communities within the region, we have great program already set up and some are being delivered many are not getting to the people who could really make a difference in our communities. The one's who have no transportation, we have little help in the areas of public transportation and that is still a short coming of the planning. In lieu of this we do have some library available sights and city buildings that can be used as a place to have distance learning. To express further the importance of the learning centers that could be a part of this plan, you have to regress to the point that the people who need the skills up-date the most and could be a better contributor to the community are the ones less lightly to be able to get to a job or school, or have health care due to the facts of sometimes self imposed circumstance or just lack of money and opportunity. When you plan for a region all types of communities and problems have to be put on the agenda and a set of goals and objectives must be considered for the greater good, not just individual communities. Yet I see that most of the programs in place make it hard for them in need to get to the services that we have currently in place and I do not see any discussion on how we begin to create a more workable plan to address the short comings. So again, I would like to suggest that the small and large communities of our region begin to look at how to deliver services as we identify the goals. The biggest reasons for lack of education are not having an understanding of our futures. A young person is lock in because they are making bad decisions and may start a family while they are still too young to cope and have not gotten the training to begin life on their own. We know this and as groups of people we have been in organization to help educate these young people to want more out of life, there are many other situations that also stop the process of preparing one's self for life, thus we have a lot of the work force

uneducated and unskilled. I say again, start with each community, we are not a carbon copy of each other, we have many of the same needs but the support systems are quite different. We need in each community to gather the form, this may not be possible, but it would be most effective to get a group to come together in each community and take ownership of their resources and problems; at a county level you may only get a few and not the ownership. I truly believe that a co-op situation in each community could be the answer to advertising, broad/ban, computer sharing etc., and even bringing in a small incubator, promoting to the Colleges that we will support good business plans, if it creates jobs.

We have good teachers, but not good leaders, they are too busy filling out three times the amount of paper work for the state and federal government that is needed to support their programs. Every day I test someone who can not read well, or spell or do 7th & 8th grade math. This is not acceptable.

So having an on going program that evolves young people working as mentors and teachers for credit toward their degree would be money well spent.

Again, we have some of this in place but not in the location where services are easy to get to with out transportation.

As business people we should know and talk to our brightest and best high school students and follow their college career and invite them to come back to our community. We stay too busy to promote our best assets, our people.

Response:

A number of the concerns expressed by this commenter are valid and are good for discussion during the Root Causes and Solutions Phases. The Planning Grant Application has been adjusted to include students as a sector/focus group to specifically be interviewed.

Comment:

Overall it looks pretty good and obviously a lot of thought went into this report. I guess I want to offer some cautions and suggestions.

-The College Degree population report is a little deceiving because this area has been heavily Manufacturing, which in most cases does not require a degree, yet in the skilled trade area are high paid income positions.

- Unless we completely change our Industry make-up the more we push students to go to college the more Brain Drain we will feel due to the jobs available in this area.

- Dan Allen quotes a report all the time that a manufacturing job provides more dollars to a local community than many other Industries.

- I'm really worried we come out with something else that pushes youth to go to college. Never working with BSU Bureau of Business Practices, will -this be a self fulfilling effort. Just like School Counselors pushing college because that is what they are familiar with.

- Wage and Benefit Survey. BSU does one and of course the Workforce Development just completed one. Can part or all of this survey be eliminated (tough to say w/o seeing questions)? Money that can be used elsewhere.

- Balance staff needs and money, so don't fall into trap many feel has hurt CAPE top heavy administratively.

- Curious how handling public forums to get enough and crucial input.

- How affect change, what happens after the Forums? Will need a lot of Marketing and buy in from Business and Education. Plus the State of Indiana will have to change some measurement criteria or nothing will change.

Response:

Some excellent questions and observations. The cautions and concerns will undoubtedly need to be a part of the ongoing process and dealt with in both the Root Causes and Solutions Phases. The comment with regard to the Ball State University Survey is the basis for engaging BSU as the sole source on this contract so that the information generated for the Region will be consistent with the Delaware County survey in process. At this time no adjustments have been made in the Planning Grant Application based upon these comments.

Comment:

The proposal contains several methods to gather input. However, I hope that the final draft contains the worker survey methodology that was presented in an email previously submitted. This would represent the voice of workers, the supply-side, of employers that are identified through the beginning stages and that may actually be asked to participate in the solutions phase. I think their input regarding employer identified root causes could be of tremendous benefit when developing solutions. While a regional wage and benefit survey may be beneficial we believe that the targeted worker survey will bring stronger, more valuable results in the development and delivery of services in the solutions phase.

Response:

A worker survey component has been incorporated into the Planning Grant Application; however the contractor has not been selected at this juncture. It is important that the worker survey relates to the demand driven emphasis of this Initiative.

Comment:

I support the application as written.

Response:

None Required.