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JOBS FOR THE FUTURE

EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.1

ASSESS YOUR CURRENT PARTNERS: INTERNAL ASSESSMENT

TOOL 1.1

This internal partner assessment is a first step to the employer engagement process. Use this worksheet to focus your efforts, outline your current partner activities, and determine what you need from your partners.

While completing this tool, keep the following checklist in mind:

- > Analyze what you need or want from your partners
- > Assess areas where you expect more involvement
- > Quantify specific relationships and why they are important
- > Set goals

WHO SHOULD USE THIS TOOL

Program managers and directors, grant managers, outreach and recruitment staff, job developers

PARTNER BASICS

1. How many industry partners does the program currently have?

- 0
 1-5
 5-10
 10+

2. Select the best description of why you think industry partners are involved with your program:

- » It is important to give back to the community
- » It benefits the company's bottom line
- » It provides a strong pipeline of talented workers
- » Other: _____

3. Why does your program seek employer partners? _____

PARTNER COMMITMENT

4. How many total hours do your industry partners spend working with your program in an average month? This can include advisory meetings, hosting events, teaching, or otherwise contributing to the program. _____ hours

5. Are your partners spending enough time each month to make the program a success?

- More than Enough
 Enough
 Usually Enough
 Not Enough

PARTNER VALUE

6. In which areas do the program's industry partnerships meet, exceed, or not meet our expectations or needs?

	Exceed	Meet	Do Not Meet	Don't Know	Not Applicable
Hiring Graduates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guaranteeing Interview for Graduates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentoring Participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teaching/Instruction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Curriculum Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hosting Company Tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leveraged Resources (i.e., donated equipment or space)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Outreach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. How else do industry partners add value to your program?

> _____

> _____

> _____

8. What other types of activities by industry partners could add value to your program?

> _____

> _____

> _____

> _____

> _____

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EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.2

DEVELOP YOUR PARTNER DATABASE

TOOL 1.2

This tool brings together the details of your employer partnership into a single table that can help you analyze trends and search for gaps in your industry relationships. It also tracks the value of your program to your employer partners as a way of keeping this employer focus at the forefront of your engagement efforts. If you put this table into Excel or a similar program, you can sort the database by employer industry, technology focus, or type of partnership activity. The accompanying tip sheet provides ideas about how each of the table's columns can inform your involvement activities in different ways. You will leverage the data that you compile on your existing employer partnerships through this tool when you use Tool 2.1 to complete an overall assessment of the key employers in your industry.

WHO SHOULD USE THIS TOOL

Program managers, directors, grant managers, outreach coordinators and job developers

BLANK PARTNER DATABASE

COMPANY INFORMATION				PARTNERSHIP SUMMARY				CONTACT INFO
Company	Industry	NAICS Code	Technology Focus	Type of partnership activity (e.g., curriculum)	Value of Program to Employer	Avg. hours spent/month	Effective Methods of Obtained Feedback	Name, email, and phone

SAMPLE PARTNER DATABASE

COMPANY INFORMATION				PARTNERSHIP SUMMARY				CONTACT INFO
Company	Industry	NAICS Code	Technology Focus	Type of partnership activity (e.g., curriculum)	Value of Program to Employer	Avg. hours spent/month	Effective Methods of Obtained feedback	Name, email, and phone
ABC Electric	Construction	2311	Solar PV	Leadership/ advisory board, curriculum	link to local leaders	15		John Doe jdoe@abc.com 555-3421
XYZ Products, Inc.	Manufacturing	3344	Lighting	offers internships	talent pool	8		Jane Doe jadoe@abc.net 777-1243

TIPS FOR USING YOUR PARTNER DATABASE

COMPANY INFORMATION

- > Industry and technology focus are critical to help you target appropriate employers and your value to them. For example, a solar panel manufacturer likely has more in common—especially around workforce development—with a business that manufactures television sets rather than with a solar installation firm.
- > The North American Industry Classification System code provides a quick way to standardize this industry information, and the NAICS code for a company can often be found at [MANTA.com](https://manta.com), at www.census.gov/naics, or by typing a web search for the company name and NAICS.

PARTNERSHIP SUMMARY

- > Trends in the hours committed by employers can help you set a realistic plan for how much to call upon your partners. In addition, it can be a quick guide for identifying particularly strong partners who might engage in a leadership role.
- > Quickly scanning the types of partnership activities allows you to identify if there are any deficiencies in the activities of the partners, such as curriculum development assistance or internship programs.
- > Partnership activities, coupled with the summary of what additional value employers are seeking, can help you determine what areas would benefit most with new partners and where to focus your outreach and engagement efforts.
- > Compare what employers identify as most valuable to your program activities in order to make sure that your program is effectively meeting the needs of your partners. This can be the basis of a mutually beneficial relationship, rather than one where the program is simply asking employers for help.
- > Effective methods for obtaining feedback from employers may vary by partner. For example, some partners may prefer individual conversations, while others prefer to provide written feedback.

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EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.3

ASSESS YOUR CURRENT PARTNERS: EXTERNAL ASSESSMENT

TOOL 1.3

Your current partnerships form the baseline of your employer engagement strategy and can be useful in engaging new employers. This tool helps you assess your current partners to see how they stack up against the activities and needs you identified in your internal assessment. Upon completion of this tool, you will have all the information you need to develop your baseline roadmap. In addition to a profile of your existing partners, the assessment tool gathers insights into your organization's value as a partner. You can use what you learn about the components of your current effective (and ineffective) partnerships as you improve your engagement efforts.

More specifically, this background and discussion guide can help you assess the following aspects of your employer engagement strategy:

- > Determine which employers are currently partners, including their industry and size
- > Profile partner contacts
- > Assess their commitment in terms of time and activities
- > Define what is valuable about your partnership to industry partners

WHO SHOULD USE THIS TOOL

Program managers and directors, grant managers, outreach and recruitment staff, job developers

This tool is intended as an informal guide to help you gather notes, specific anecdotes, and detailed answers to specific questions as you talk to employers. You want to make sure that you use your limited time with the employer by discussing information that you cannot locate elsewhere. The questions in the value of partnership section should be the focus of your conversation—but make sure you have completed the background and partnership sections in advance so you have the proper context.

Company: _____ Date: _____

VALUE OF PARTNERSHIP

1. Select the statement(s) that best describes why you are involved with our program:

- It benefits our company's bottom line
- It provides us with a strong pipeline of talented workers
- It is important to give back to the community
- None of the above

2. To what extent are we meeting your needs?

- Very helpful in addressing our needs
- Somewhat helpful
- Occasionally helpful
- Not at all helpful

3. Thinking of the new hires that your firm has made for positions that are related to our program, how often are those new employees graduates of our program?

- Never
- Rarely
- Sometimes
- Frequently
- Almost always

4. How would you describe the value of participating in the program for your firm?

5. How can our program add more value to your business?

6. Please list any competitors or business partners who might also be interested in participating in a partnership with us, and who we should include in our outreach:

> _____

> _____

> _____

BACKGROUND

Start by filling out everything that you already know about the employer, and supplement that by consulting labor market information and other data. You may have some gaps that need to be filled in during your conversation—but make sure to keep the conversation focused on the employer and its needs.

1. What is the interviewee's title or position within the firm? _____
2. How many workers does the firm employ? _____
3. What is the company's address, and if it has more than one location in our area, what are its other addresses?

> _____

> _____

> _____

4. Which industry (or industries) is the firm most connected to (e.g., utilities, construction, manufacturing, transportation)?

> _____

> _____

5. Are there any specific specializations that are important to the firm (e.g., solar, lighting, biotechnology)?

> _____

> _____

> _____

6. Is the firm a member of any industry trade associations (such as clean energy councils, environmental business organizations, or manufacturing associations) or local chapters of national organizations (such as the U.S. Green Building Council or Solar Energy Industries Association)?

> _____

> _____

> _____

7. How does the company maintain a public presence, including any marketing channels such as Facebook or LinkedIn?

PARTNERSHIP ACTIVITIES

If you already know or can find out the answer to these questions, fill in the information on your own rather than asking the employer during your conversation. Some of this can be included in your discussion with the employer.

8. How did the firm become involved with our program?

9. How long has the firm been involved with our program? _____

10. On average, how much time does the firm commit to the program on a monthly basis?
_____ hours

11. What type of activities do they usually participate in?

Curriculum Development

Internships

Job Interviews

Community Outreach

Teaching and Instruction

Other: _____

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JOBS FOR THE FUTURE

EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.4

SETTING GOALS TO GUIDE NEW PARTNER DEVELOPMENT

TOOL 1.4

This worksheet helps you analyze the information you have gathered about your partnership so that you can set goals to strengthen it. The background and baseline activities sections summarize what you already know about your partnerships, as collected through Tools 1.1-1.3. Now you are ready to start thinking about how you can build a mutually beneficial partnership. This tool focuses on key program activities and allows you to set additional goals. The subsequent sections will help you build your desired relationships.

WHO SHOULD USE THIS TOOL

Program and grant managers and directors

BACKGROUND

1. My partners are generally Small (less than 50 employees)
 Medium (50-499 employees)
 Large (500 or more employees)

This information is critical because large companies often have dedicated staff for community relations, internal training, internships, and recruitment. If you are targeting larger companies, you will have to focus more time on finding people with specific titles using those keywords. Also, larger employers tend to hire more frequently in bunches and have very specific needs for specialized workers. Most of the training programs in the United States focus on larger employers' needs.

Small employers, on the other hand, often have few or no staff people who are dedicated to specific tasks as referenced above. As a result, smaller employers typically have less flexible schedules for commitment, require generalists who are cross-trained in numerous activities, and typically hire only one worker at a time. Many of these employers will also not have formal internship or internal training programs. The resulting involvement will therefore be quite different, because their needs are very different from those of larger firms.

- > Located within _____ miles of the program

This information is important for several reasons. First, reviewing this information will help you determine how far your influence reaches from your program location. Is this similar to your organization's reach for prospective students?

Second, the information can help determine how you should engage with employers. Generally, the further the employers are from your program location or campus, the more important it is that you go to them rather than vice-versa. When the reach is particularly broad, using technology for virtual meetings is also important.

Finally, if your students come from farther away than your business partners, expand your reach. If the businesses are farther away than your students, be sure to determine whether students can travel the distance to take advantage of internship and employment opportunities.

- > Members of an industry association: Yes No

This information will help you determine how the employer defines itself. For example, if company X makes solar panels and is a member of the Solar Energy Industries Association, it likely thinks of itself as a solar company. This should impact your engagement and marketing, especially if you have a solar program. If however, company X is not a member of SEIA but is a member of the National Association of Manufacturers, its representatives are less likely to be interested in a program marketed for solar than one marketed for manufacturing. The takeaway here is to **use language that is appropriate to how the company defines itself rather than how you define it.**

2. My employer contacts began as:

- Personal friends
- Former colleagues
- Graduates of the program or school
- On the board of my organization
- On the board of one of my partners
- Other: _____

This information tells you two important things: a) what types of relationships have been successful for building partnerships; and b) potentially untapped sources of partners. For each of these categories that are underrepresented, ask why. If you have tried and it has not worked, find out why it has not worked. If you have not tried those types of contacts, broaden your search. At the same time, for your more successful sources, ask your colleagues to develop lists to make sure that you've fully tapped the potential.

BASELINE ACTIVITIES

The following questions help you assess where you are covered in terms of involvement and where you could use more support. Ideally, you would see an even split among these activities. Any deficiencies will help you prioritize the types of partners you should seek.

3. My partners are primarily involved in the following key roles:

- Hiring/Interviewing graduates
- Internships/Mentors
- Curriculum development
- Teaching/Instruction
- Community outreach
- Other volunteers
- Donating resources
- Other: _____

4. We have deficiencies in the following key roles:

- Hiring/Interviewing graduates

- Internships/Mentors
- Curriculum development
- Teaching/Instruction
- Community outreach
- Other volunteers
- Donating resources
- Other: _____

The following questions help you to more precisely define what you are looking for. The questions give you goals for partner development, make sure that your goals are adequate and appropriate, and help to develop “the ask” so that you can tell partners what is expected of them.

HIRING AND PLACEMENT

5. How many more partners does our program need in order to hire and place our graduates? _____
6. We need this many partners because: _____

7. We would like them to contribute through the following actions:
 - » _____
 - » _____
 - » _____

INTERNSHIP

8. How many more partners does our program need in order to have more internships? _____
9. We need this many partners because: _____

10. We would like them to contribute through the following actions:
 - » _____
 - » _____
 - » _____

MENTORSHIP

11. How many more mentorship focused partners does our program need? _____

12. We need this many partners because: _____

13. We would like them to contribute through the following actions:

- » _____
- » _____
- » _____

CURRICULUM DEVELOPMENT

14. How many more partners for curriculum development does our program? _____

15. We need this many partners because: _____

16. We would like them to contribute through the following actions:

- » _____
- » _____
- » _____

OTHER ACTIVITIES

17. List the other activities for which you would like employer support:

- » _____
- » _____
- » _____

18. How many partners does our program need to add for other activities? _____

19. We need this many partners because: _____

20. We would like them to contribute through the following actions:

- » _____
- » _____
- » _____

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EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.5

WHAT EMPLOYERS VALUE MOST

TOOL 1.5

Most employers have at least some history of involvement with educational institutions and job training programs. Based on these experiences and their current situation, employers have developed their sense of what kinds of engagement they most value, what they are willing (but not eager) to do, and what they prefer to avoid altogether. Gathering information about these preferences is essential for your program because building your partnerships with employers around their preferences increases the likelihood that each employer feels connected to the program. In some instances, where prior partnership experiences were not successful for example, employers may not have felt their time was well spent, you may need to rebuild trust and relationships. This process may take some time, but is essential to ensuring strong, lasting partnerships.

Share this worksheet with employers as a starting point for a joint discussion of how they can be involved in your program. You can ask them to complete it on their own, or use it as an interview guide when you meet. Afterwards, calculate the average score across all types of involvement to gauge an employer's overall interest in engaging your program, or use this to identify the most likely forms of engagement. Follow up this worksheet by asking exploratory questions about why some things are valued more than others. Their answers can not only guide your partnership but also help you tweak the design of your program.

WHO SHOULD USE THIS TOOL

Existing and potential employer partners

Company Name: _____

Name and Title: _____

IDENTIFYING THE FORMS OF ENGAGEMENT THAT MATTER TO YOU

We would like your input about your needs and which forms of involvement with our training program are most valuable to you. Your responses will help us make the best use of your time, rather than connect you to elements of our program that are not important to your company. We will also use this information as a guide as we work with you to develop a strong partnership and training program.

Please let us know which of the following workforce needs are priorities for your company.

(1) Needs Are Met **(2)** Occasional Need **(3)** Need **(4)** Primary Need

WORKFORCE ELEMENT	1	2	3	4	COMMENTS
Hiring Staff					
Upgrading Skills of Existing Staff					
Other:					

For each of the forms of engagement below, choose the option that best reflects that item's importance to you in a potential collaboration with our organization.

(1) Don't Value at All **(2)** Don't Value Much **(3)** Value **(4)** Strongly Value

FORM OF ENGAGEMENT	1	2	3	4	COMMENTS
Hire program graduates					
Interview program graduates					
Hire temporary workers					
Join program leadership/advisory group					
Host paid or unpaid interns					
Host job shadowing					
Provide grants or donations to program					
Provide mentors					
Receive or give awards and recognition					
Help with curriculum review and development					
Staff serve as instructor or presenter					
Other					

We would enjoy discussing your responses in person. Thank you for your interest.

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EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.6

MAPPING YOUR ASSETS

TOOL 1.6

Preparing for effective employer engagement requires knowledge of all of your assets, including those that may not seem obvious. Use this table to map your assets in four major categories: knowledge, facilities, relationships, and partners. As you complete the tool, ask yourself: “What can we do, or whom do we know, that could help current and potential employer partners?”

WHO SHOULD USE THIS TOOL

Program managers, employer engagement staff

KEY ASSETS

When used as part of an employer engagement strategy, asset mapping requires you to think about everything in your program that might have value to external partners. Start with your expertise as a training provider. You can help employers through training workers for their job openings or retaining and upgrading their current workers. A strong way to demonstrate this asset is through data that describes your prior experiences or return on investment (ROI) analyses.

Think not only about what your organization controls directly, but also what you can bring to the table through your existing partnerships. Your assets can be most simply categorized into four groups:

- > **Knowledge:** What business and industry expertise do we have that could help targeted employers?
- > **Facilities:** Do we have a function space or access to a space that would be useful for events and forums? Do we have training facilities or equipment of value?
- > **Relationships:** Is our leadership connected to public officials or other people of interest to local employers?
- > **Partners:** Do we have existing relationships with organizations that are recognizable and trusted by target employers?

Use this table to organize your existing and potential assets in an asset map that includes key concepts and relevant staff or partners. As you think about your organization, be creative and look beyond your current activities and core programs. For example, as an education and training provider, you may not influence public policy directly. However, your organization is a key community asset and a potential forum for public debate.

BLANK ASSET MAP

CATEGORY	ASSET	CONTACT	DESCRIPTION
Knowledge			
Facilities			
Relationships			
Partners			

SAMPLE ASSET MAP

CATEGORY	ASSET	CONTACT	DESCRIPTION
Knowledge	Data on addressing workforce needs	Lisa Avery	Lisa led an ROI study on training to upgrade worker skills in the industry
	Entrepreneurship	Mary Doe	Mary has started 3 companies and is a guest lecturer on entrepreneurship
	Clean energy	Joe Smith	Joe is a leading expert in solar power
Facilities	Multipurpose room	John Smith	Multipurpose auditorium with A/V and seating for 300
	Outdoor event space	Jane Doe	Flat garden green space with seating for 500 or standing for 1,000
Relationships	Secretary of Economic Development	Mary Smith	Mary works directly with the Secretary of Economic Development
	Mayor's Office	Dean Taylor	Dean knows the Mayor personally
Partners	University of California, San Diego	Anne White	Anne works part-time at UCSD and can connect us to the career development department

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EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.7

DEMONSTRATE RETURN ON INVESTMENT TO EMPLOYERS

TOOL 1.7

Your employer partners have many competing demands on their resources. It's not easy to decide how best to deploy limited time, people, equipment, and money in a way that best serves customers, grows the business, and generates strong profits. To make decision-making a little easier, many businesses use return on investment (ROI) calculations to assess new opportunities—like possible involvement in your program. You'll be better positioned for success if you are prepared to demonstrate the advantages of involvement in the form of an employer ROI.

This tool will help you think about your program from the perspective of financial ROI for your potential employers. Even if you ultimately choose not to promote your program to employers using a specific ROI—in dollars—working with this tool will give you a powerful window into the criteria by which many employers make decisions, and a business vocabulary for making your case.

WHO SHOULD USE THIS TOOL?

Executive directors, program managers

SOURCE

This tool is adapted from Barker, K., 2002. Why Train? Calculating the Return on Training Investment. Burnaby, BC: Open Learning Agency. Adapted with permission of Thompson Rivers University, www.tru.ca.

WHAT IS RETURN ON INVESTMENT?

The basic idea behind return on investment (ROI) is simple and easily understood. If you invest \$1,000 in a company's stock, for example, you want to estimate how much more you'll have in your account a year from now. If the estimate is \$1,100, the expected return on your investment is 10%. You can use that 10% ROI to make decisions about how to invest your money by comparing that estimate against other investment opportunities.

When money is the only resource being invested, and more money is the only return hoped for, it's fairly easy to calculate ROI. The decision to become involved in your training program, however, is much more complicated than that. Calculating the employer ROI for involvement in your program requires the following things:

- > Listing investments of time, money, and resources the employer must make
- > Listing benefits that will accrue to the employer as a result of their investment
- > Translating both costs and benefits into dollar values
- > Demonstrating the training program was responsible for generating the benefit

FIVE STEPS FOR CALCULATING EMPLOYER RETURN ON INVESTMENT

The employer's ROI for involvement in your program will ultimately be expressed through the simple equation below:

$$\text{Value of employer benefits/employer cost of involvement} \times 100 = \text{ROI}$$

The process of calculating this employer ROI involves the following five steps:

1. Identify and describe the training under analysis
2. List the reasons for training from the employer's perspective
3. Calculate the costs of training (total) and note which are borne by the employer
4. Calculate the benefits of training (total) and note which accrue to the employer
5. Calculate the ROI for the employer

The checklist and worksheets that follow will help you work through the five steps.

STEP ONE

IDENTIFY AND DESCRIBE THE TRAINING

Before you can begin to assess the costs and benefits of your training from the employer's point of view, it helps to take it apart so that you can see the component pieces. Generally speaking, this involves answering six questions, including:

- > **What is the curriculum?** Understanding the curriculum in detail will help you assess the skills, knowledge, and competencies that trainees will receive by virtue of having taken the training. These have a value which can often be quantified.
- > **Where does the training take place?** Answering this question gets at both costs—such as rental space and transportation to and from site; and benefits—such as avoided cost for the employer if you are using your own space.
- > **How is the training to be delivered?** Online? Classroom? On-the-job training? Labs?
- > **When is the training to take place, and how long?** Gets at issues of total hours—which have dollar value—and when those hours take place which may create lost or added time for the employer.
- > **Who are the participants?** This is critical. You will use this information later. Are these incumbent workers whose new skills will create immediate, quantifiable value? Are they people who will likely be hired, providing work-ready people (with quantifiable value) at a very reasonable cost? Are they people who are being trained for industry in general, adding to the overall pool of applicants?
- > **What is the unit of ROI analysis?** A typical “unit of analysis” is either an individual training program graduate, or an entire training cohort. That is, your final ROI equation will demonstrate the quantifiable benefits of investment in training the “unit of analysis” when compared to the cost.

IDENTIFY AND DESCRIBE THE TRAINING UNDER ANALYSIS

> **WHAT** is the curriculum? _____

> **WHERE** does the training take place? _____

> **HOW** is the training to be delivered? _____

> **WHEN** is the training to be delivered? _____

> **WHO** are the participants? _____

> **ROTI:** what is the unit of ROI analysis? _____

Notes: _____

STEP TWO

LIST THE REASONS FOR EMPLOYER ENGAGEMENT

This step gives you and your staff a chance to consider the reasons for investing in training from the employer's point of view. There are many reasons an employer might make such an investment, but we've found that they can often be grouped together under the following categories:

- > **Business and industry context** (e.g., keeping up with trends, changes, best practices and regulatory requirements in the affected industry that require more qualified people to be hired, or incumbent workers to be trained.)
- > **Tangible outcomes** (e.g., new or improved skills for workers, new hires)
- > **Intangible outcomes** (e.g., deepened community relationships, company reputation)
- > **External circumstances** (e.g., political, social and community environment)
- > **Payback period** (e.g., responding to an immediate training/hiring need, or building for the future)

IDENTIFY AND DESCRIBE THE TRAINING UNDER ANALYSIS

Consider these factors to identify your reasons for training:

- > Business and industry context: _____

- > ROTI analysis perspective: _____

- > Tangible outcomes: _____

- > Intangible outcomes: _____

- > External circumstances: _____

- > Payback period: _____

Notes: _____

STEP THREE

CALCULATE COST OF EMPLOYER ENGAGEMENT Your process here involves two steps. First, calculating the total cost of training. Second, calculating which part of the cost is borne by the employer, if any. This is a critical step for third-party job training programs, and may end up being your secret weapon in negotiations. Here's why: In many cases, employers will find that while the benefits accrue to their company (well-trained employees with new or improved skills, new people to hire quickly, etc.); the costs are largely borne by the training provider through grants and contracts. The employer gets the benefit and someone else pays much of the cost! Sounds like a good deal.

Use the sample cost calculation worksheet to get you started. Your own cost categories might differ from those we've provided.

CALCULATE THE COSTS OF TRAINING

Not all of these items will be applicable in every case.

COST ITEM	TOTAL COST/UNIT OF ANALYSIS ¹
Needs assessment and training plan	
Curriculum and materials development	
Registration or tuition fees	
Trainer and consultant fees	
Materials and equipment	
Facilities	
Refreshments	
Travel costs: food, transportation, lodging	
Assessment & certification fees	
Salary replacement cost	
Other	
Total training cost	

¹Unit of ROTI analysis (e.g., per person, per session, per year)

Notes: _____

STEP FOUR

IDENTIFYING AND ASSESSING DOLLAR VALUES TO BENEFITS OF EMPLOYER ENGAGEMENT

Identifying tangible and intangible benefits

This step is the most important, and most difficult, part of the ROI process. You must first create a list of all of the tangible and intangible benefits that accrue to the participating employer, and then decide which ones are translatable into dollar values. Finally, you must then make a stab at assessing an actual dollar value to the benefit.

Based on information from employers and other research, we've created a list of some typical tangible and intangible benefits on the Worksheets below. Use them as a launching pad to create your own.

Assessing dollar values and calculating total employer benefit

The sample worksheet below gives you a sense of the type of benefits that can often be assessed in dollar terms. These are:

- > Time Savings
- > Productivity Increases
- > Personnel Savings

These are categories that any employer can understand in terms of dollars—either dollars saved against expected benchmarks, or new dollars generated.

Use the worksheet to create your own calculation of employer benefits, and strongly consider involving existing employer partners in the exercise.

Use these checklists to help you identify the costs and benefits that may apply to the training under your ROTI analysis.

Tangible Benefits

- Increased sales
- Improved overall quality
- Improved competitiveness
- Improved productivity per staff
- Improved profitability
- Improved customer satisfaction
- Improved personnel relations
- Improved safety record
- Compliance with regulations
- Broadening the range of workers' tasks
- Meeting a shortage of qualified labour
- Implementation of new ideas
- Other

Intangible Benefits

- Improved understanding of new technologies
- Remediation of workers' inadequate pre-employment preparation
- Improved understanding of markets
- Improved staff morale
- Greater cooperation among staff
- Better management-staff relations
- Better staff understanding of the organization
- Greater staff flexibility
- Greater staff loyalty
- Improved staff work ethic
- Improved staff motivation
- Improved staff perceptions of job responsibilities
- More problems solved
- Conflicts avoided
- Increased use by staff of performance measures and standards, benchmarking, and quality control methods
- Other

CALCULATE THE BENEFITS OF TRAINING

Measure those returns most important to you and for which you can gather data—actual or informed estimates.

TANGIBLE RETURNS CATEGORIES	CALCULATION	TOTAL
<p>Time Savings</p> <p>(e.g., reduced supervision, absenteeism, downtime)</p> <p>> Hours × wage × number of employees</p>		
<p>Productivity Increase <i>if applicable</i></p> <p>(e.g., quality/quantity changes due to training)</p> <p>> Reduction in complaints</p> <p>> Increase in sales, customer satisfaction</p>		
<p>Personnel Savings</p> <p>(e.g., reduced recruitment costs, grievances, accidents)</p> <p>> Cost of individual interventions × incidence</p>		
<p>Other</p> <p>> _____</p> <p>> _____</p> <p>> _____</p>		
Total Returns		

Notes: _____

STEP FIVE

CALCULATE FINAL ROI FOR EMPLOYER ENGAGEMENT

You're ready! Using the worksheet, plug in the total dollar value of the benefits you've identified and the dollar value of the total costs. Perform the simple equation, and you have an estimate of the employer ROI for involvement in your program.

CALCULATE THE RETURN ON TRAINING INVESTMENT

Total benefits in dollar value	
Total costs in dollar value	
Divide the benefits by the costs and multiply by 100 to get a percentage	

Value of benefits/Cost of training × 100 = ROTI

Notes: _____

GreenWays



JOBS FOR THE FUTURE

EMPLOYER ENGAGEMENT TOOLKIT | TOOL 1.8

CRAFT AN EMPLOYER-BASED VALUE PROPOSITION

TOOL 1.8

As you prepare to approach employers, develop a statement of your value proposition in collaboration with some of your existing employer partners. Conduct this exercise with a group that includes a diverse cross-section of staff. This will help capture the value generated throughout your organization. In addition, include at least one employer to make sure you do not rely on faulty assumptions when determining the value of a partnership to industry.

WHO SHOULD USE THIS TOOL

Senior leaders, program managers, instructors, board members, selected employers

This group exercise provides a quick way to gather multiple perspectives on the value of your organization, and to craft language that can be used with employers. The exercise can be completed in less than an hour, although you might want to dedicate some additional time for review and discussion of the final product.

STEP 1: GATHER IDEAS

10 minutes

Each participant should, individually, draft an explanation of the value for employers in partnering with the program. This description must be three sentences or fewer.

STEP 2: HIGHLIGHT KEY IDEAS

5 minutes

Pull out the keywords from each participant's description and write them on large sticky notes or blank sheets of paper. Tape sheets to a whiteboard or wall so that they are visible to the entire group. Are there common keywords that emerge across most individual statements? If so, list them here:

»

»

»

»

»

STEP 3: BRING IT ALL TOGETHER

25 minutes

Discuss each keyword and develop, as a group, a concise value proposition that is three sentences or fewer. Think of this as an employer-focused “elevator speech.” Be sure that it keeps the employer focus in mind:

STEP 4: REVIEW YOUR VALUE PROPOSITION

20 minutes

Discuss what you’ve learned, using the following questions:

- > What were the differences between “values” of staff members and employers?
- > Does the final value proposition describe your program, or does it feel more like a statement of what you want the program to become?
- > Was it easy to craft a value proposition targeted specifically at employer needs?