DOCUMENT RESUME

ED 391 048 CE 070 623

AUTHOR Bergman, Terri
TITLE Approaches to Forming a Learning Consortium: A Guide for Service Providers. Business Assistance Tools.
INSTITUTION National Alliance of Business, Inc., Washington, D.C.
SPONS AGENCY Department of Labor, Washington, D.C.
PUB DATE Dec 95
CONTRACT F-4357-3-00-80-60
NOTE 86p.; For related documents, see ED 378 406-407, ED 380 555-556, ED 382 794, ED 384 776-777, ED 386 592, and CE 070 622-625. Product of the National Workforce Assistance Collaborative.
AVAILABLE FROM National Alliance of Business, Distribution, P.O. Box 501, Annapolis Junction, MD 20701 (order no. R6064); or on the World Wide Web: http://www.psu.edu/institutes/nwac.
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS Adult Education; Checklists; *Consortia; *Cooperative Planning; *Corporate Education; Delivery Systems; Guidelines; Needs Assessment; Organizations (Groups); *Partnerships in Education; Program Development; Program Evaluation; Resource Materials; *School Business Relationship; *Shared Resources and Services
IDENTIFIERS National Workforce Assistance Collaborative

ABSTRACT

This guide is intended for education and training suppliers, manufacturing extension programs/centers, economic development institutions, and other service providers involved in helping companies become more productive. It explains how to organize and support learning consortia consisting of companies that have come together to develop new capabilities, build their employees' skills, and increase their enterprises' productive capacities. The guide is divided into nine sections each of which deals with one of the following issues in forming a learning consortium: creating a concept; building membership; creating an organization; establishing a mission and goals; assessing needs; developing a program; delivering the program; evaluating the consortium; and building sustainability. Appendixes constituting approximately 50% of the guide include the following: summary of approaches to addressing the nine issues in forming a learning consortium; sample contact information, mission statements, and assessment tools used by consortia; lists of high performance work practices, skills required for effective participation within a learning consortium, and the best practice guidelines of the National Workforce Assistance Collaborative (NWAC) best practice guidelines; lists of 3 resource organizations and 34 print resources pertaining to learning consortia; and lists of NWAC board and advisory group members and products/services. (MN)

NATIONAL
WORKFORCE
ASSISTANCE
COLLABORATIVE

Approaches to Forming a Learning Consortium

A Guide for Service Providers

National Alliance of Business

*The **National Workforce Assistance Collaborative** builds the capacity of the service providers working with small and mid-sized companies in order to help businesses adopt high-performance work practices, become more competitive, and ultimately advance the well-being of their employees. The Collaborative was created with a $650,000 cooperative agreement grant from the **Department of Labor** to the **National Alliance of Business.** Current partners on the project include the Council for Adult and Experiential Learning, the Institute for the Study of Adult Literacy at The Pennsylvania State University, the Maryland Center for Quality and Productivity, and the National Labor-Management Association. The Collaborative provides assistance in four areas: employee training, labor-management relations, work restructuring, and workplace literacy. For more information, contact Cathy Stewart at the National Alliance of Business, phone: 202/289-2915, fax: 202/289-1303, e-mail: NWAC@NAB.COM.*

Development and printing of this publication was funded under Grant Number F-4357-3-00-80-60 by the U.S. Department of Labor. Opinions expressed in this publication do not necessarily represent the official policy of the U.S. Department of Labor.

To order additional copies, contact:
National Alliance of Business
Distribution
P.O. Box 501
Annapolis Junction, MD 20702
Phone: 800/787-7788
Fax: 301/206-9789
E-mail: INFO@NAB.COM

NATIONAL WORKFORCE ASSISTANCE COLLABORATIVE

Approaches to Forming a Learning Consortium

By Terri Bergman

December 1995

NATIONAL ALLIANCE OF BUSINESS

Acknowledgements

This guide was written by Terri Bergman, National Workforce Assistance Collaborative Products and Services Manager, National Alliance of Business.

The National Workforce Assistance Collaborative would like to thank the individuals who provided research material for this guide and who offered advice and guidance over the course of the guide's development:

- Louise Bertsche, Performance Consulting
- Keith Bird, New Hampshire Community Technical College
- Brian Bosworth, Regional Technology Strategies
- Terry Brumett, Terry Brumett, Inc.
- Daniel Dangler, Northern Rhode Island Private Industry Council
- Lynne Fry, U.S. Department of Labor
- June Holley, Appalachian Center for Economic Networks
- John Hoops, Consultant
- Gregg Lichtenstein, Collaborative Strategies, Inc.
- Stephen Mitchell, National Alliance of Business
- Eric Parker, Rutgers University
- Nancy Renner, Catonsville Community College
- Esther Schaeffer, National Alliance of Business
- Eva Schiorring, City College of San Francisco
- Maureen Sheahan, Labor-Management Council for Economic Renewal
- Johan Uvin, Massachusetts Adult and Community Learning Services
- James Van Erden, National Alliance of Business
- Joan Wills, Institute for Educational Leadership

This guide could not have been completed without their help.

Special thanks go to Bernice Jones for checking and rechecking all of the quotes and program descriptions in the publication, and to Chrysa Cullather, Marvin H. Harden, Amy Pincus, Cathy Stewart, and Kim West for their editing, graphics, and production assistance.

Table of Contents

Introduction

Purpose of the Guide

This guide is designed to help *service providers* organize and support *learning consortia.* Service providers include the variety of public and private organizations that help companies become more productive. Learning consortia are groups of companies that come together to learn from each other in order to develop new capabilities, build the skills of their employees, and increase the productive capacities of their enterprises.

Why learning consortia? Learning consortia are particularly valuable to small and mid-sized businesses, which lack the time, money, and staff expertise to single-handedly develop and implement a plan for increasing productivity. By banding together into consortia, these companies share the costs of needed expertise, and, more important, share their own knowledge and experience about what works and how. Service providers can play an essential role in furthering the development of consortia by bringing firms together, facilitating their interaction, linking them to educational resources, and handling coordination and administration tasks.

This Guide . . .

Is designed for

- Education and training suppliers
- Manufacturing extension programs and centers
- Economic development institutions

Would also be useful for

- Business and trade associations
- Unions
- Business management consultants
- Small firm owners
- Large company customers

Learning Consortium

A group of companies that come together to learn from each other in order to

- **Develop new capabilities,**
- **Build the skills of their employees, and**
- **Increase the productive capacities of their enterprises.**

Who are providers? Providers that might take up the charge of building a learning consortium are education and training suppliers, including community colleges and universities. But providers do not have to be suppliers of education and training to develop a learning consortium. The role they must play is more *facilitating learning* than *dispensing information*, though they could easily do both. Potential providers also include others with a mission of helping small and mid-sized companies, such as manufacturing extension programs and centers and economic development institutions.

Anyone else? While this guide is targeted at service providers, many of the concepts it addresses are also relevant to other organizations that might want to form a learning consortium. Business and trade associations, unions, or business management consultants could facilitate consortium development. Small firm owners that see the benefits of joining together could use this guide to create a consortium without outside help. Large company customers could use this guide to bring their smaller company suppliers together, promoting learning that would reap financial benefits for *all* firms involved – the small suppliers *and* the large customers.

Why this guide? All of the organizations discussed above could profit from the ideas presented in this guide. While the guide does not advocate a single, lock-step approach to organizing and supporting a learning consortium, it does discuss the issues that most consortia will face at some time during their existence. Being aware of these issues, and reflecting on them from the start, can lessen the difficulties inherent to consortium building.

After reading this guide, providers will know

- What a learning consortium is,
- Why they would want to form a learning consortium, and
- How to go about organizing and supporting a learning consortium.

Definition of a Learning Consortium

In general, a learning consortium is a group of companies that come together to learn from each other in order to develop new capabilities, build the skills of their employees, and increase the productive capacities of their enterprises. Most learning consortia undertake both workforce and workplace development efforts. A consortium's work*force* development efforts concentrate on building the skills of the individuals in member companies (including management staff), while its work*place* development efforts aim at improving the productivity and efficiency of the companies' workplace processes and strategies.

Just companies? Some consortia do not restrict their membership to companies, but also include other parties, such as labor, educational institutions, job training organizations, economic development agencies, or community organizations. However, even in learning consortia with broadened memberships, the cornerstone of the consortia remains making member companies more competitive. In most instances, this guide will focus solely on the company members, though the reader should interpret this to include other members, when appropriate.

What do they do? Members of learning consortia engage in *cooperative* learning, or learning from each other. In learning consortia, the interaction of the members is key. Firms share knowledge and work together to build their productivity and competitiveness. In many learning consortia, member firms establish an explicit goal of simultaneously moving toward high performance.[1] In a learning consortium, members engage in an ongoing process that provides both firms and any organizations working with them an opportunity to be more reflective about where they are trying to go and what might be the best strategies for getting there.

Business Consortia Functions

Brian Bosworth, of Regional Technology Strategies, has identified four basic functions of business consortia:

- Sharing **production,** where firms cooperate in manufacturing components, assemblies, or finished goods;
- Sharing **marketing,** where firms jointly market their products;
- Sharing **resources,** where firms pool resources to develop a joint solution to a common problem, such as training, waste management, or health insurance; and
- Sharing **learning,** where firms seek to learn collectively about some of the complex changes essential to improving their competitiveness.

Business consortia are becoming more and more widespread throughout the United States, with many consortia being organized and operated for each or several of these purposes. There are, however, more shared learning consortia than any other type. Mr. Bosworth postulates that this is because, of the four business consortia functions, sharing learning places companies at least risk of being dependent on the business performance of others in the consortium.

"*Businesses tell us they no longer have answers. Consortiums of companies doing mutual problem solving in groups are demonstrating that, collectively, better answers come from many minds working together.*"

Robert Leaver
Organizational Futures
Rhode Island High Performance Learning Consortium

Learning or training? Many people draw a distinction between learning and training. Training, they suggest, is a means to an end, a one-time event, an activity. Learning, on the other hand, is the goal of training, and is also an ongoing process. Most learning consortia engage in both learning and training. In addition to sharing knowledge among themselves, consortium members come together to jointly develop, purchase, or share training, thus reducing the costs of training to any one firm. Consortium members not only learn *cooperatively*, they learn *collectively*, that is they learn together from some outside authority. Consortia that *just* engage in *collective* learning might be more properly termed *training* consortia.[2]

Shared training or a training class? The locus of control and power is what differentiates a consortium's shared training function from classes offered by a training provider and open to enrollment by any individual. In a consortium, the members define their training needs and learning objectives and seek providers willing to meet their specifications. In courses offered by training providers, the providers define the course content and companies must accept what is available.

Benefits of Learning Consortia

Members can gain many benefits from participating in a learning consortium. While these benefits hold for both small and large companies, they are of particular importance for smaller firms. Few small or mid-sized companies would be able to achieve these benefits without becoming part of a consortium, while many larger companies might be able to achieve them on their own.

Benefits
- Companies: improved competitiveness
- Employees: enhanced employability and wages
- Communities: increased economic activity

Benefits from shared learning. The process of working together as a group and learning cooperatively is extremely powerful. Members can share problems, solutions, and ideas with each other, thereby reducing the number of mistakes they make and shortening their learning curves. In many cases, con-

Continued on page 6

[1]A number of definitions of high performance exist, including the Center for the Study of Human Resources' "Six Major Attributes and Associated Indicators of High Performance Work Organizations," and Ray Marshall's "Eight Key Elements of High Performance Work Systems." A copy of the high performance work practices identified by the U.S. Department of Labor's Office of the American Workplace is located in the appendix.

[2]Much of the information in this section was developed based on conversations with Brian Bosworth. Those interested in more information on the topic can contact him at Regional Technology Strategies, 1955 Massachusetts Avenue, Cambridge, MA 02140; phone 617 492-2377; fax 617 492-2376; e-mail BBOSWORTH@CONNECTINC.COM.

Business Consortia that Share Learning:

Agile Apparel

Agile Apparel is a consortium of six small garment businesses in the San Francisco Bay Area working with organized labor and the City College of San Francisco to convert from high-volume to high-value production. The consortium provides training for both managers and line workers, preparing them to move into flexible manufacturing and modular production and to incorporate new production and communication technologies into the manufacturing process.

In addition to the training programs, Agile Apparel provides customized technical assistance to help each company develop and implement a conversion plan, as well as networking opportunities where the companies can learn from each other.

Agile Apparel serves as a demonstration project for Garment 2000, a comprehensive program to revitalize the San Francisco Bay Area garment sector.

The FlexCell Group

The FlexCell Group is a production consortium, located in Columbus, Indiana. This strategic alliance of small machine shops, pattern makers, plastic injection mold and tool shops, engineering and computer firms, and a management consulting firm, came together to compete effectively in a global economy. The group engages in joint purchasing and joint marketing, in addition to joint production efforts.

The FlexCell Group has undertaken a number of initiatives to align member companies into a single, large, productive "virtual" company. One such initiative is cross training employees in technical skills, enabling them to "synergistically" combine the disparate technologies used in the various member companies.

Another initiative is improving communications. The FlexCell Group has been training employees (particularly managers and supervisors) in communication skills, thus helping them to share information and ideas across companies. The group is also investing in new communications technologies, then training employees to work with this new equipment.

The Industrial Consortium

The Monadnock Training Council, a local small business advisory group, operates the Industrial Consortium in the Connecticut Valley labor market (the south-eastern corner of Vermont, north-central Massachusetts, and western New Hampshire). The consortium is organized and operated to make the costs of education and training affordable to the area's small businesses.

The training council solicits input from companies in the area to determine training needs, then selects training topics in large demand. Committees of companies interested in those topics draft educational objectives and training requirements and put these out to education and training providers for bid.

The training council oversees delivery and evaluation, ensuring that participating companies' needs are being met.

Labor-Management Council for Economic Renewal

The Labor-Management Council for Economic Renewal, in Taylor, MI, is a consortium of 37 firms and 16 union organizations in the manufacturing, manufacturing services, and health care industries focused on work restructuring and labor-management relations. Council staff work with member companies' management staff, labor leadership, labor-management steering committees, and work teams, to facilitate meetings, deliver training, develop tools, and supply materials.

Rather than providing packaged training programs, council staff first help members identify their needs and concerns, then deliver the appropriate services. Council training activities are focused on such topics as strategic planning, work restructuring, and team building. Council networking activities use membership meetings, task forces, and panel discussions to foster learning across work sites. Council publications capture lessons from participating members.

The council is 80% self supporting through membership dues, fees for services, and grant income. Council staff operate out of United Auto Workers (UAW) Region 1A headquarters, which provides the council with office space, equipment, mailing services, postage, and supplies.

Massachusetts High Performance Manufacturing Consortium

The Massachusetts High Performance Manufacturing Consortium is a group of 13 small to mid-sized companies, mostly electronics or electronically related firms, working together to become high performance organizations. These firms are trying to increase their investment in skills, support new work structures, promote employee involvement, invest in new technologies, and adopt new competitiveness strategies.

Led by the Bay State Skills Corporation, this Massachusetts consortium tries to reduce the firms' training costs by sharing firms' existing training resources among members and jointly developing or contracting for training services from outside providers.

In addition, the consortium assesses members' needs, provides some on-site consulting services, and promotes networking among members so that they can learn from one another.

Rhode Island High Performance Learning Consortium

The Rhode Island High Performance Learning Consortium consists of seven manufacturers, facilitated by the Northern Rhode Island Private Industry Council, working together to adopt continuous improvement processes to become high performance workplaces.

The consortium tailors its services to individual member companies. It begins by assessing each company's needs, and developing a plan of assistance matched to that company's agenda.

The consortium provides training, mentoring and management consultant services, and networking opportunities. It serves as a strategic broker of training and technical assistance providers, identifies potential resources, and creates strategic alliances.

Southeastern Ohio Learning Consortium

The Southeastern Ohio Learning Consortium is a loose network of companies, education providers, economic development organizations, employment and training agencies, and community-based organizations, rather than a tightly defined membership consortium.

This network, led by the Appalachian Center for Economic Networks (ACEnet), is focused on promoting economic development in the region. ACEnet develops and markets new products, promotes workplace change strategies, builds employees' skills, and trains and finds employment for the unemployed (both dislocated and disadvantaged).

In operating this network, ACEnet pulls together smaller groups of companies and other organizations, as appropriate, for specific projects.

The Wisconsin Regional Training Partnership

The Wisconsin Regional Training Partnership is a regional labor market organization designed to institutionalize a new bargain between management and labor, establish an advanced occupational training system, and upgrade the quality of area supplier companies.

State labor and management studies determined that the region's metalworking industry could only survive if production practices were modernized and skills were upgraded. The partnership was formed to support joint approaches to workplace change and skill development.

The partnership, which has equal participation from both labor and management, encourages greater investment in incumbent workers, develops future workforce programs for unemployed adults and youth, benchmarks skill standards to advanced industry practices, and promotes the incorporation of these standards into incumbent and future workforce training.

Note: The examples included in this guide were selected because of their relationship to the National Workforce Assistance Collaborative. (Five share a common funding source with the Collaborative; one was studied by a sister project, the National Center for the Workplace; and two were initiated by a Collaborative advisor.) Descriptions of additional learning consortia are contained in another National Workforce Assistance Collaborative publication: *Delivering Cost Effective Services to Small and Mid-Sized Companies.*

11

From page 3

sortium members, collectively, have all the answers they need to succeed – all they have to do is learn to share.

Benefits from shared training. Through consortia, training costs can be reduced, training resources expanded, and training relevancy improved. Consortium members can reduce their costs by sharing training development and delivery expenses. They can expand their access to training resources by sharing curricula, facilities, and trainers. By combining their resources, members might also be able to research and design new programs that they could not have developed on their own. Finally, with the leverage members gain by being part of a group, they can persuade education and training providers to tailor course content to meet their needs.

What's the bottom line? When the benefits of shared learning and training are added together, everyone gains. Companies' competitiveness is improved. Employees' employability and value – potential wage – are enhanced. And for communities, there is increased economic activity and a stronger tax base.

Shared Learning in Business Consortia

While companies in pure *learning* consortia come together for the express purpose of learning from each other, shared learning is frequently a component of other business consortia. For these consortia, learning may serve as a support for another purpose or as part of a bigger societal goal.

- **Production Consortia.** Production consortia – groups of companies working together to jointly produce a product – often implement learning activities to prepare employees to work effectively across company boundaries.
- **Labor-Management Consortia.** Joint labor-management consortia can use learning as a means of transforming the relationship between labor and management.
- **Industry or Economic Development Consortia.** Development consortia may use learning to revitalize an industry or economy, save jobs, increase wages, and/or employ the unemployed. They might also use learning to support community revitalization or to build a regional economic development system.

To be of value to the real and diverse community of business consortia that currently exist and are likely to be created, this guide can be used by all business consortia with a learning dimension.

Learning can be part of. . .

- Production consortia
- Labor-management consortia
- Industry or economic development consortia

Issues in Forming a Learning Consortium

This guide lays out nine issues a service provider will have to address in organizing and supporting a learning consortium:

1. Creating a concept.
2. Building membership.
3. Creating an organization.
4. Establishing a mission and goals.
5. Assessing needs.
6. Developing a program.
7. Delivering the program.
8. Evaluating the consortium, and
9. Building sustainability.

No single approach. These issues should not be viewed as discrete, linear *steps*; there is no cookie-cutter approach to forming a learning consortium. The order in which a service provider may have to address these issues might be different from the order listed above, though the issues listed first are likely to happen earlier in the process, and the ones listed last to happen later. In addition, the issues are inter-related and a provider may have to address many of them at the same time. Most of the issues will have to be visited and revisited periodically over the consortium's lifetime.

Organizing and supporting learning consortia is not only a dynamic process, it is an inexact process. In most cases, there are no clear-cut right or wrong ways to address the issues; the guide presents *options* for the provider to consider. Consortia building is also a forgiving process. If missteps are taken, they usually can be retraced. Most of those who have worked with consortia would choose to approach some things differently if they had a second chance. This guide crystallizes lessons learned from their "mistakes," as well as their successes.

Membership structure and approach. How a provider approaches these issues will depend on the membership structure it intends to create. Most learning consortia have tightly drawn memberships. This means that the consortia are composed of a clearly defined group of organizations that have committed to working together for a mutually agreed-upon purpose. Some learning consortia, however, are loose *networks* of organizations, which are formed into subgroups, as appropriate, to work on special projects.

The information contained in this guide is most appropriate for the more tightly drawn membership consortia. In general, the suggestions presented in this guide promote much more formal and structured processes than will be necessary for loose networks, though some good ideas can be gleaned from the guide for networks as well.

Provider's objectives. While a service provider's primary objective for forming a learning consortium is to assist companies, it will also have its own organizational goals for developing a consortium. A provider must define its organizational objectives.

- Is it looking for a stream of income from serving as the facilitator of the consortium? Does it intend to get a grant or charge member companies a fee to cover its time for serving as a facilitator? If income from serving as a facilitator is one of the provider's key interests, then it should carefully consider whether the role it intends to play in the consortium will generate that income.
- Is it looking to create more coherence (and product demand) from its customer market? Does it have difficulty marketing and delivering its services to small and mid-sized companies, and does it think that pulling the companies together as a con-

sortium will make this easier? If delivering training services is a key goal, the provider should ensure that a focus of the consortium is on joint training efforts.

- Does it view the benefits of a learning consortium as helping it to achieve its own mission, and therefore worth the costs it will have to bear as a facilitator? If the provider wants to maximize the benefits of the consortium, it should be willing to work itself out of a role if that is what seems best for the consortium.

The provider must answer the questions above before it begins the process of forming a learning consortium. The answers it gives can affect how it will address each of the issues included in this guide.

1. Creating a Concept

Critical Components

- Determine [illegible]
- Define members [illegible]

Before a service provider can form a learning consortium, it needs to develop an *initial concept* for the consortium. What is it trying to accomplish? Which organizations does it want to involve? Both of these issues will have to be addressed again later, and in more detail. At this point, the provider only needs to establish a preliminary concept as a base for discussions with potential members and supporters.

Purpose

If the provider's goals are broad, it might set the purpose of the consortium as promoting economic development or revitalizing an industry. A more narrow purpose might be enhancing companies' workforce and workplace development efforts. More narrow still would be accessing customized training or reducing training costs. Ultimately the consortium's purpose will have to be set and agreed on by its members, once the consortium is actually formed.

In general, the narrower the purpose, the easier the learning consortium will be to organize and support, and the quicker results can be achieved. A broader purpose, on the other hand, may be more beneficial to companies (and the community), but more difficult to bring to fruition.

> "*Forming a consortium with a narrow purpose enables providers to gain substantive involvement more easily, and to get results more quickly. Later, providers might take advantage of emerging needs and opportunities and expand the consortium's purpose.*"
>
> Maureen Sheahan
> Labor-Management Council
> for Economic Renewal

Membership

Membership, too, can be broadly or narrowly defined. For many consortia, membership is restricted to companies. Others include labor representatives. Including labor representatives is especially important if the provider will be working in a unionized environment, as labor's support for workforce and workplace changes dramatically increases the consortium's probability of success.

Some learning consortia also include, as full-fledged members, the various organizations that will be working with the companies (e.g., education, training, and economic development providers). Others even expand beyond this to include community-based organizations. In general, consortia focused on such broad goals as

The Northern Rhode Island Private Industry Council has found it difficult to jointly serve its consortium's diverse membership. Members of the Rhode Island High Performance Learning Consortium include a 30-employee jewelry maker and a multimillion dollar international corporation.

15

economic development have a more inclusive membership, while those focused on training or learning are more restrictive.

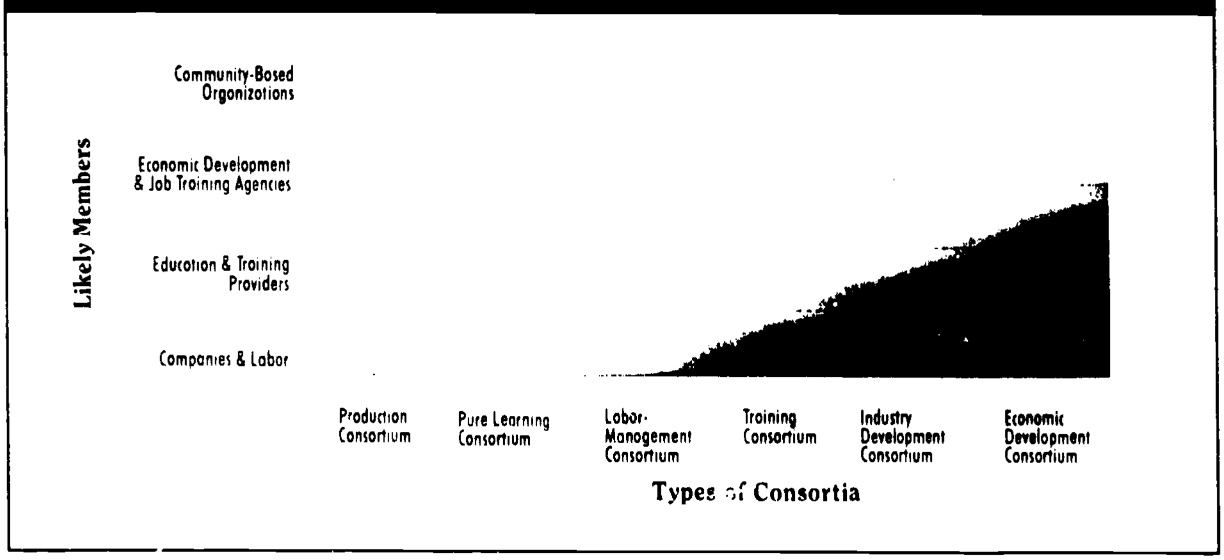
Restricting membership gives more power to those inside the consortium compared with those outside of the consortium. For example, a consortium composed entirely of companies determines the education and training it wants based entirely on member companies' learning goals. The consortium then might contract with various providers to meet the companies' specifications as stated. If education providers are part of the consortium, the goals of the education providers might also be considered in determining the education and training specifications. In addition, the member educational organizations would be the presumed providers to the consortium.

Most individuals involved with learning consortia feel that geographic proximity among the members is crucial, but some learning consortia operate without this restriction.

Some people involved with learning consortia insist that members must be from the same or related industries so that the issues they are facing will be quite similar. Others suggest that a diverse group of companies is needed to ensure that members have different ideas to offer each other. These people claim that the training and learning needs among companies from different industries can have enough in common to create an effective learning consortium.

Opinion is also divided on whether or not to include competitor companies in the same learning consortium. Consortia that restrict membership to noncompetitors fear that the presence of competitors will discourage companies from sharing ideas and information. Other consortia have found, much to their surprise, that competitors are relatively forthcoming with information on their practices. Sharing "competitive secrets" may be less of an issue in consortia focused on sharing training and learning, than in those that are also sharing production.

The Relationship between Consortium Purpose and Membership



16

Keys to Success

- Study other consortia. Learn what others have tried in an economy and with industries similar to yours. Find out what has worked, and what has not.
- Know your local economy. Know which businesses and industries are key and what your community's education and training resources are.
- Conduct advance research to determine what would be a "compelling draw" to get your target members into your consortium. Talk with these players informally and find out what their interests in a consortium might be.
- Look for "naturally occurring" associations among companies (e.g., subgroups within business associations, quality improvement groups, supplier networks of large companies).
- Make selections that ensure:
  - A critical mass of organizations.
  - Common needs among the member organizations.
  - Representatives of businesses (and other organizations) that are critical for achieving your purposes.
  - Geographic proximity among the members.
  - Possibly, a large firm or firms as an anchor or starting point for the consortium.

2. Building Membership

Critical Components

- Recru
- Build
- Build know
- Build trust

There is no learning consortium without members. Building membership, however, involves more than just recruiting participants, it also involves educating them about what the consortium can be and helping them to become a cohesive group.

Members

The section "1. Creating a Concept" discussed most of the issues around the *types* or *categories* of members that could be part of a learning consortium, such as companies, labor, education and training providers, and community-based organizations; those in geographic proximity or not; those from the same, similar, or disparate industries; and those that are competitors or only noncompetitors. This issue area focuses on the *characteristics* of potential members within these types or categories and methods for finding them.

The *company* members of a learning consortium are its cornerstone. Regardless of whether or not the consortium also includes representatives from other organizations as members, the consortium's focus is on making the member companies more competitive – through workforce and workplace development efforts – and therefore, recruiting the right companies is key.

In recruiting, providers should look for companies that are

1. Committed to becoming high performance work organizations, and
2. Willing to work toward this goal with other companies.

Companies committed to becoming high performance work organizations will probably have begun to implement such strategies as making long-term investments in skill development; investing in technology and advanced production techniques; promoting new work structures, management and organizational development, and employee involvement; and developing quality systems and continuous improvement programs. Such companies will likely be interested in improving and integrating their initial attempts in these areas.

To determine whether potential members meet the second criterion – a willingness to work with other companies as part of a learning consortium – providers might ask recruits whether they will commit to both sharing their resources with other companies and providing funds to help support the consortium's efforts.

Recruiting *companies* to be part of the consortium is a beginning, but at a functional level, members will be represented by *people*. Company leaders must be actively

As the Massachusetts High Performance Manufacturing Consortium was starting up, the program leaders met with the Chief Executive Officers (CEOs), presidents, and vice presidents of member companies to determine the specific training needs within each company, as well as the companies' strengths in workplace training and education. In the spring of 1995, the consortium held a miniconference at which companies with identified expertise in a particular area led workshops on topics identified as important by the member companies.

18

involved with, or at least supportive of, the learning consortium. No major changes can happen in a company without their backing.

Representatives of all the groups that will be involved in the workforce and workplace development activities must be included. Representatives may be high-level managers, supervisors, and employees. Not all of these individuals need to be present at every consortium meeting. Higher-level individuals will probably be involved in strategic activities, while lower-level individuals will be involved in operational activities.

> The Industrial Consortium developed a very innovative strategy for recruiting companies. It clipped out all of the "Help Wanted" advertisements from the local papers in the region, and sorted them into piles based on the job skills advertised for. The Consortium then selected the tallest pile, and phoned the companies advertising vacancies to ask whether they were interested in training their own employees to fill the jobs. Companies that were interested and were willing to work with other companies with the same skill requirements formed the nucleus of the new consortium.

In recruiting noncompany members of the consortium, a provider should look for the organizations that will be most supportive of the consortium's purpose. While labor representation is critical if the provider is operating in a unionized environment, employee representatives can also facilitate a consortium's success in a nonunion atmosphere. Other organizations to consider including are education and training providers and economic development agencies. Community-based organizations can be valuable if the consortium will be training individuals outside of the member companies and these organizations have a relationship with the individuals being trained.

There are many places to look to find potential company recruits. Providers can go to companies they have worked with in the past on other projects, where they already have a good relationship and some credibility, try to "grow" the consortia out of company networks they created in the past for other purposes, or look to "naturally occurring" business groups. They could approach local business organizations and make presentations at their meetings or undertake a direct mail or phone marketing campaign. Using early recruits to pull in additional ones can also be a very fruitful strategy.

Interest

After identifying potential members, the provider must interest them in joining a learning consortium. The best way to build interest is to make a solid case that participation will lead to concrete, positive outcomes for the members. For companies, such a case might include offers of help in undertaking workforce and workplace development activities, customized and lower cost assistance, and ultimately, improved competitiveness. The provider should use examples from work it has undertaken with companies in the past or the results from other learning consortia to make this case.

The provider can also encourage companies to join the learning consortium by linking participation to other benefits it is in a position to supply. Depending on the provider's own resources and expertise, this might include access to low cost credit, loans of computers or other equipment in high demand, or development of new markets.

> The Southeastern Ohio Learning Consortium loaned computers to companies to help them understand the benefits of computerization.

Knowledge

Consortium members must get to know one another if they are to work together effectively.

Providers can help members build this knowledge through group meetings where members can talk about their operations and their goals for participation in the consortium. They can also arrange group visits to each member's site where they can see the operations firsthand.

Getting to know one another does not always have to be strictly business. Sometimes it is valuable to get members together for social activities (such as boat cruises or informal dinners) so that they can get to know each other as people and learn to relax around one another.

Trust

Everyone involved with learning consortia stresses the importance of building trust among members. They agree that trust is crucial to the success of any consortium. The provider is responsible for establishing an environment conducive to trust. This involves instituting the expectation within the group that open and honest dealings will be the *modus operandi*, establishing ground rules that support trust, and addressing any issues that may block trust as soon as they arise.

Providers can also build trust by focusing members on long-term goals they can all agree to and finding some short-term goals they can accomplish together easily. Providers may discover that members have enough trust in each other to work together on some projects, but not on others. By developing a history of "small successes," members can build trust in each other and the consortium can build trust for future activities.

Keys to Success

- Build member commitment to the learning consortium. Show members how the consortium will directly benefit them and their organizations.
- Help members to "own" the consortium. They must buy into its purpose and feel that it is *their* consortium, not the provider's.
- Focus on building relationships among the members. The consortium will not be able to do anything unless the members are willing to work together.
- Establish trust. Trust is the foundation upon which a consortium is built.

3. Creating an Organization

Critical Components

- **Create structure**
- **Hire facilitator**
- **Procure funding**
- **Ensure communication**

A learning consortium must become an *organization* if it is to operate smoothly. It needs to have an operating structure, an individual responsible for keeping the consortium on track, money to cover management and program expenses, and a system for keeping members informed about the consortium's activities. In developing and instituting these features, providers cannot operate on their own; they need to work with the members to ensure that the organization meets the members' needs.

Structure

The provider needs to work with consortium members to jointly develop an agreed-upon structure that clearly defines members' roles and responsibilities. This structure might be relatively stable – a board and permanent committees – or more fluid – a steering committee and ad hoc committees. The structure should be agreeable to consortium members, and should give members control over the consortium's direction, while not overly burdening them.

While meetings should probably follow a regular schedule, each meeting should have value for consortium members. Nothing will kill a consortium faster than members' perceptions that participation is not worth their effort. Meetings might be rotated among members' sites so that the members can learn more about each other's operations.

Part of establishing a structure is ensuring that all legal issues are dealt with appropriately. Informal agreements will probably suffice for consortia with relatively simple management structures and without real or intellectual property. Consortia with more complex arrangements, or those seeking outside capital, might have to look into such options as limited liability corporations, joint ventures, partnerships, subcontracting arrangements, and cooperatives. Consortia focused on joint worker training, gathering marketing information, or group quality certification are generally termed "precompetitive," and should have no problems with antitrust violations. Those involved with shared production, purchasing, or marketing might raise antitrust issues, and should seek expert legal counsel.[3]

The Rhode Island High Performance Learning Consortium has a "leadership group" — consisting of company presidents and human resource managers — that meets monthly to review the consortium's progress and make needed corrections. According to Dan Dangler, the consortium's director, involving these company leaders builds commitment and ensures that the members themselves direct the consortium.

[3] C. Richard Hatch, *The Network Brokers Handbook: An Entrepreneurial Guide to Cooperative Strategies for Manufacturing Competitiveness* (Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology, Manufacturing Extension Partnership, 1995).

Facilitator

Operating a learning consortium as an "all volunteer" entity is very difficult. Because members will probably not be able to contribute a lot of staff time to the effort, the provider should count on having to find someone (or ones) to serve as dedicated staff to the consortium to assure accountability and follow through. This staff can come from an independent consulting firm or be an employee of the service provider, an educational institution, a government agency, a community organization, a management company, or a member company.

Consortium staff must include a skilled facilitator. The facilitator must be able to help consortium members expand their view of the possibilities, set a direction, and take steps that will get them to their goals. The term "facilitator" is not a job title, but rather a job description. Consortium facilitators usually have such titles as director or coordinator.

Facilitators must, in effect, be able to "walk on water." They should have strong leadership and team building skills. They should be able to listen to different perspectives, identify and articulate common interests, deal productively with conflicts, and build consensus. They should be able to serve as "strategic brokers," analyze situations, think systematically, experiment, "market" the consortium, and collaborate with other organizations. They should also have project management skills and be able to plan and coordinate meetings. Most important, they must be able to generate excitement and enthusiasm.

Facilitator Skills

- Leadership
- Team building
- Consensus building
- Strategic brokering
- Project management

Agile Apparel initially used someone outside of the garment industry to conduct its needs assessment. The consortium was not able to gain members' cooperation until it replaced that individual with someone well respected within the garment community.

Facilitators must also have credibility with, and the respect of, consortium members. They must have experience working with the business community and, in single-industry consortia, a solid track record *in that field*. They should have familiarity with small business operations and the problems small businesses face, and experience with organizational change efforts. Facilitators should have contacts throughout the business community and familiarity with public and private training services.

"The more complex the consortium project, the more important the leader."

Eva Schiorring
Agile Apparel

Effective learning consortium facilitators have quite a list of responsibilities. They work with members to help them create a focus for the consortium, assess individual members' needs, and identify common needs. If members' expectations are either too low or too high, facilitators help members reframe their needs, encouraging them to see the bigger picture. Facilitators also have the job of joining separate members into a cohesive whole. They serve as initiator and mediator. They generate confidence, promote cooperation, and foster openness among members. They create an environment that enables members to build relationships of trust.

Learning consortium facilitators serve as key links to essential educational resources. They can identify potential resources, link

22

members to training and technical assistance providers, provide referrals and introductions, and create strategic alliances. Facilitators are the "work horses" for their consortia. They organize meetings, coordinate functions, carry out work assigned by the consortium leaders, collect and distribute information members need, maintain personal contacts, and develop communication links among the members.

Finally, facilitators are responsible for outreach activities. They can conduct telephone and direct mail campaigns with potential members, solicit press coverage, and provide speakers at community functions.

Facilitator Responsibilities

- Assess needs
- Build focus
- Generate cohesion
- Provide access to resources
- Handle logistics
- Ease communication
- Conduct outreach

Once the facilitator is on board, the line between the facilitator's responsibilities and the provider's responsibilities becomes blurred. In fact, the rest of this guide tends to use the two terms interchangeably. In consortia where the facilitator and the provider are one and the same, this is not a problem. In instances where the facilitator and the provider are not the same entity, the two will need to agree on which tasks each will lead.

Funding

A reliable funding base is a tremendous asset to any learning consortium. Providers must find a way to finance the initial start-up costs, then cover the ongoing operations. Consortium members rarely cover the costs of the initial start-up. Providers will probably have to cover these costs themselves or seek outside funding from such sources as government grants, regional authorities, trade association, foundations, large customer firms, or unions.

Even after the learning consortium has moved into an operational phase, it will still need a reliable funding base to support ongoing, administrative operations. This might be covered by the service provider, an outside grant, or dues from consortium members. The costs of specific learning activities could also be subsidized or covered by fees for the services.

Communication

The service provider must develop an effective communications system that keeps members informed about processes, activities, and decisions. Effective communications are needed not only among consortium members, but also within each members' organization, and between the consortium and the wider community.

> *"Communication must be regular, but not excessive."*
>
> Eva Schiorring
> Agile Apparel

In developing communication systems, the provider might consider using regularly scheduled consortium meetings; meeting minutes; newsletters; and phone, fax, or Internet contacts. The provider should also develop a member directory and a resource data base.

Of the consortia highlighted in this guide, only The FlexCell Group, in Columbus, IN, was initially formed and supported entirely with members' own resources. For its first two years, it was supported solely by the originating pattern company. After that, all members contributed equally. Most likely this occurred because the group started out with a focus on *production*. Only later did the consortium seek funding from the U.S. Department of Labor to support the learning associated with its communications agenda.

Keys to Success

- Invest sufficient time in coalition building. Members must come to an agreement on how decisions will be made and what their responsibilities will be.
- Model the processes of continuous improvement and collaboration. If the learning consortium's goal is to help member companies move toward high performance, the consortium itself should use the high performance processes it is encouraging the companies to adopt.
- Be sure to balance the value of the activities in which you engage members with the time they will have to devote to them. Small and mid-sized companies do not have a lot of time for activities that do not have an immediate impact on their bottom lines.
- Begin work with a pot of money that can be used for up-front development costs. Make use of existing community resources.
- Involve multiple layers of the member organizations in creating the consortium. Success will require encouraging wide-spread participation within member organizations and gaining wide-spread involvement and support from the beginning.

4. Establishing a Mission and Goals

Critical Components

- Establish [illegible]
- Develop goals

Learning consortium members need to jointly develop a mission and goals, specifying their purpose and what they hope to accomplish together. These will serve as the overarching framework for their activities.

Mission

The learning consortium's mission must be one that has meaning for all of the consortium members. Consortium members will have to devote a considerable amount of time, if not money, to making the consortium succeed, and they will not be willing to do so unless it is in pursuit of something in which they believe.

> *"To train and develop our human resources to increase our companies' competitiveness and growth."*
>
> Massachusetts High Performance Manufacturing Consortium

In crafting the consortium's mission statement, members might want to start with the purpose originally established by the provider. This, however, will have to be modified to meet the interests of the various members. Consortium facilitators will have to use their consensus-building skills here to help the members arrive at a statement they can all buy into.

> *"To acquire the training and skills the companies, and their employees, require to increase competitiveness and succeed."*
>
> Rhode Island High Performance Learning Consortium

Mission statements should answer the questions: What do we propose to do? For whom? and To what purpose? The broader a consortium's membership, the broader the mission statement is likely to be. Mission statements that consortia might craft include these:

- To acquire the training and workplace skills necessary to compete in a global marketplace.
- To expand productive capacity, improve product quality, and enlarge market potential.

> *"To enable firms and their support organizations in Ohio Appalachia – including training and business assistance providers, technology transfer organizations, government agencies, banks and lenders, government entities, and economic development organizations – to become high performance organizations, leading to the transformation of the regional economy."*
>
> Southeastern Ohio Learning Consortium

- To improve labor-management relations, and build mutual commitment to economic performance and employment security, and
- To promote regional economic development and rejuvenate local industries.

> "*The process that we have employed in this consortium allows the business participants to create the agenda and drive the process. Therefore, the benefits derived from the consortium have a meaningful and immediate impact on one's decision making and business.*"
>
> Michael Akkaoui
> Tanury Industries
> Rhode Island High Performance
> Learning Consortium

Goals

A consortium's goals will flow from its mission, providing more concrete statements of purpose. Possible learning consortium goals include such things as:

- To meet member companies' education and training needs in a timely and cost-effective manner,
- To gain ISO 9000 certification,
- To define job skill requirements, agree upon appropriate pay scales, and develop necessary training programs, and
- To train unemployed individuals for productive employment and place them in jobs.

Goals will be most useful if they include both *measures of success* and *milestones for success*. Developing measures will give the consortium something tangible to shoot for. Developing milestones will help it gauge progress along the way. To make goals more measurable, members should specify such things as time frames, quantities (e.g., number of jobs analyzed, number of training topics and sessions, number of people trained, and number of people placed in jobs), and dollar amounts (e.g., costs, wages, and benefits).

The provider should encourage member organizations to develop their *own* measurable goals for participation in the consortium, beyond those goals jointly agreed to by consortium members. For companies, these might include increased sales and profits, lower scrap, or fewer customer complaints. Educational institutions, on the other hand, might be looking to increase the number of courses developed with business input, increase company satisfaction with training programs, and increase training sales.

The measurable goals and milestones developed by the consortium and its members should form the basis for evaluation of the consortium over time.

26

Keys to Success

- Develop a common mission that all members support. Members must feel that they *own* the consortium's mission.
- Be clear about what the consortium hopes to accomplish. Members must be able to gauge the consortium's progress over time.
- Make sure that goals are realistic and achievable. Keep focused. Do not try to be everything to everyone.
- Make sure that members involve multiple layers of their own organizations in discussions about the consortium's mission and goals. Support for the consortium must be strong *throughout* members' organizations. Each member must accept the consortium's mission statement as part of its own operating practices.

5. Assessing Needs

Critical Components

- [illegible]
- [illegible]

Before a learning consortium can provide an appropriate program of services, it must determine what services its member companies need. In doing this, the provider should not only determine what companies need to succeed *in the marketplace*, but also what they need to be effective participants *in the consortium*.

Companies' Needs

Providers can play a valuable role in enabling organizations to look beyond their immediate needs and formulate a vision of where they could go. In determining what companies need to succeed in the market place, providers should start with a clear understanding of high performance practices (see appendix), and assess companies' needs against this framework.

A good assessment will recognize the inter-relationship of workforce *and* workplace development and will assess needs in multiple areas, such as workplace literacy, employee training, work restructuring, and labor-management relations. It will also look at the whole organization, assessing company, department, and individual needs.

Individuals from member organizations will probably be able to provide much more information on what their companies need to succeed in the marketplace, than on what they need to be effective participants in the consortium. Service providers can build a list of the skills members will need to use within the consortium[2] – such as effective listening, communication, and participation skills – and assess members' abilities in these areas as well.

> "*A needs assessment must look beyond companies' immediate, apparent needs, to their emerging needs, needs arising from market changes and advancements in technology. Assessments must evaluate companies' needs in the context of a high performance agenda.*"
>
> Maureen Sheahan
> Labor-Management Council for Economic Renewal

Measurements

Providers can use a number of techniques to assess companies' development needs, including observation, written surveys, and interviews. Providers can visit members' work sites and examine company work practices, equipment usage, and employee skill needs. They can also conduct one-on-one interviews to

---

[1]For more information on assessing company needs, see another National Workforce Assistance Collaborative publication: *Assessing an Organization's Training Needs*.

[2]A list of "Skills Required for Effective Participation within a Learning Consortium" is contained in the appendix.

determine the kind of assistance company CEOs, managers, and supervisors think would be worthwhile.

> *"There may be a difference between what companies think they need to succeed and what the facilitator thinks they need. Facilitators need to educate companies, especially when they conclude that incremental change won't be sufficient."*
>
> Eva Schiorring
> Agile Apparel

Providers should venture beyond the supervisory level to assess employees' needs. Employees themselves are frequently the best sources of such information. Providers could survey employees about their skill needs, or conduct actual skill assessments. When working with employees, it is important to treat them with respect, guarantee confidentiality, and address any fears they may have that poor test performance will result in job loss.

Focus groups provide another good means to assess development needs. Focus groups can be conducted within or across companies. They can include people at similar levels within the organizations, or combine individuals across levels. Participants tend to be more comfortable opening up in homogenous groups (same companies or levels). Heterogeneous groups (mixed companies or levels) tend to spark more ideas in participants. Lower-level employees placed in groups with their supervisors and managers are frequently reluctant to provide honest opinions.

Keys to Success

- **Involve** [illegible] **holders (such as labor, educational institutions, and other potential** [illegible] **of the assessment plan and tools. They will have a lot of insights into what** [illegible] **be asked and how best to get the right answers. In addition, if they are not** [illegible] **the assessment is conducted, they may not give credence to the results.**
- **Get input on needs from m**[illegible] **companies. Those at the top rarely know everything that is going on in a company** [illegible] **that is needed. Gaining involvement before starting an assessment is the best w**[illegible] **support for its results.**
- Do not inordinately raise **expectations** [illegible]**. Be sure your questions cover** issues the consortium members **will be willing to add**[illegible]
- Use reliable assessment **instruments and methodolog**[illegible] **results can throw the consortium off track from the beginning.**
- Keep individual assessment **results confidential. While com**[illegible] **their** employees, *as a whole*, **have skill deficits, they do not need to** [illegible] **person** basis (though the consortium trainers will). **The little value they might** [illegible] **such** detailed information will be more than lost by employee **animosity and** [illegible]

BEST COPY AVAILABLE

6. Developing a Program

Critical Components

- **Conduct research**
- **Catalog resources**
- **Develop programs**
- **Acquire curricula**

The learning consortium will need a program of services addressing companies' needs *as separate organizations* and *as members of the consortium*. To develop this program, the service provider should research the possibilities and then work with members to define the program.

Research

The provider is responsible for helping members visualize a future different from their present state. Companies engaged in the daily practice of delivering a product or service, and making a payroll, do not always have the luxury of thinking about better ways to structure their work processes and engage their employees more productively. The provider can examine best practices in workplace and workforce development from around the world and help companies to use these examples as models for their own change efforts.

Providers should also help companies develop a process for obtaining their goals. The service provider needs to study other consortia, with similar memberships and objectives, to learn what processes have worked best for them.

Providers should try to make their research as real, or concrete to members as possible. Providers could, for example, organize "field trips" for members, taking them to high performance companies and giving them the opportunity to observe the activities of other learning consortia. The value of learning from those with first-hand experience in a change effort cannot be over stated.

> *"Facilitators ought to have a clear, well-informed, and strategic vision of what they hope to achieve through the consortium, while still being flexible and patient, and prepared to do what their members are ready to do, even when it's merely an incremental move in the right direction. They need to sustain their members' involvement by moving slowly enough to gradually expand the members' comfort levels, yet quickly enough to generate results."*
>
> Maureen Sheahan
> Labor-Management Council for Economic Renewal

Resources

Taking stock of existing resources as part of program planning is always valuable. A list of resources available to the learning consortium would probably include:

- Local education and training providers (public and private) and the courses they offer,
- Local consultants and other work*place* development facilitators and the services they offer,
- Training programs and facilitation services member companies can provide, and

30

- Multi-media and distance learning resources consortium members could access.

In addition to cataloguing available resources, providers should determine the quality of each resource. This can be accomplished in a number of ways:

- Consortium members that used a resource before could attest to its level of quality.
- The consortium could adopt the ISO 9000 training and education standards[6] and assess the resources against them, or
- Consortium members could define the *process* standards[7] they want all resources to meet (e.g., customized to company needs, varied learning/teaching strategies), along with the *content* standards they need for each type of service, then measure the resources against these standards.

The learning consortium need not invest a lot of time up front evaluating all of the resources identified, just those that it is considering using. The others could be evaluated later, if and when they were being considered for use.

Programs

The consortium's program of services must help companies become high performance work organizations and prepare them to participate effectively in the consortium. It must also be more than the sum of its parts. The pieces must fit together as a coherent whole that takes consortium members from where they are to where they want to be.

The facilitator can help each member develop its own "conversion plan," its individual path to becoming a high performance organization. From these plans the consortium can put together a program of services that addresses each companies' needs, as well as the needs of the consortium as a whole.

> *"The consortium should plan its training strategically. Programs should work together to bring companies to the goals they've agreed to as a consortium, as well as to the goals they've established for themselves individually."*
>
> Maureen Sheahan
> Labor-Management Council for Economic Renewal

Typical consortium services include training sessions, where new ideas and techniques are taught to consortium members (usually as a group); networking opportunities, where member companies have the opportunity to learn from each other; and individualized consulting services, where experts work one-on-one with member companies to help them address their own specific problems.

Consortia with relatively broad missions tend to take on a broader range of programs. Those with production goals try collaborative projects or new product development. Other consortia, with economic development goals, might undertake apprenticeship programs or training programs for dislocated or economically disadvantaged individuals.

[6]See *Quality Management and Quality Assurance Standards – Guidelines for the Application of ANSI/ASQC Q9001-1994 or Q9002-1994 to Education and Training Institutions* (Milwaukee: American Society for Quality Control, 1994, draft.)

[7]The National Workforce Assistance Collaborative's "Best Practice Guidelines" for services in the areas of employee training, labor-management relations, work restructuring, and workplace literacy are located in the appendix.

Curricula

If the consortium's program requires training, it must acquire the appropriate curricula. Before the consortium undertakes any new development, though, it should check its catalog of resources to see if what it needs already exists. Frequently, an existing program only needs slight modification to meet members' objectives.

If any new curricula are developed, company members should take an active role in their design. Participation could take a number of forms, varying in the degree of company involvement. On one end of the spectrum, companies could define their learning objectives, and then send these out to education and training institutions as a "request for proposals." On the other end of the spectrum, the curricula could be developed jointly by company managers, potential trainees, and educational institutions. Either of these processes would require delineation – up front – of who has control of, and who ultimately "owns," the curricula.

Keys to Success

- Target services at the needs of member companies, as defined by the companies. Learning objectives should not address what educational institutions *think* companies need, they should address the real-world problems companies are facing on a daily basis. Members must control the development and decision-making processes.
- Gain input from, and provide services to, individuals from all levels within the companies. All are likely to be a source of good program ideas, and all will need training and other services to become part of effective, high performance work organizations.
- Build members' capacity to lead the consortium. The more members are able to facilitate themselves, the more they will be able to control their learning experiences, and the more likely they will be able to continue functioning as a group without outside support.
- Continually expand the pool of potential training sources. Open market competition is the best way to ensure that the consortium gets the training it needs at the best possible price.
- Recognize that program development is a dynamic process. Programs must change in response to changes in participant needs and feedback on existing services.

7. Delivering the Program

Critical Components

- [illegible]
- Facilitate [illegible]
- Provide co[illegible]
- Conduct mo[illegible]

The payoff to all of the planning is the actual delivery of services. For most learning consortia, this includes group training sessions, networking opportunities, and one-on-one consulting services. The provider needs to both continually monitor the programs over the course of delivery to ensure that they are meeting members' needs, and revise programs as necessary.

Providers also need to prepare consortium members for their own program delivery responsibilities. This may include providing release time for employees in training or networking sessions, ensuring that the appropriate staff people are available to work with a consultant, and collecting and providing relevant data for program monitoring. Providers should help members understand the importance of supporting program activities, and prepare members to support these activities at the work site, so that new knowledge and ideas become integrated into company work practices.

Training

One of the advantages of a learning consortium is that it provides the opportunity to reduce the costs of training to individual companies, by having them shared among a group. In group training, though, it is important to accommodate members' concerns about competitors learning their secrets. This can usually be handled relatively easily by holding any sessions using "sensitive" information on a company-by-company basis.

Group training sessions can be classroom-based, though it is best if participants are provided opportunities for "hands-on" learning. Taking students on site visits to other programs and companies and providing them the opportunity to see other technology and work processes first hand can be very effective.

Consortia that train unemployed individuals for jobs in member companies might rotate these people through a number of internships at different companies as part of their training. This provides them with the opportunity to learn a variety of skills, as well as to gain insights into the different firms. It also allows the companies to preview their potential employees.

Providers can organize classes in a variety of ways. People with similar jobs at different companies can be trained together. This provides them with the opportunity to share expertise. People from different levels within the same company can be trained together. This can be effective in helping to break

Facilities

Facilities for the learning consortium do not need to be extensive. Meetings and training sessions can be held at company sites. If the companies do not have space, educational institutions or business organizations may be able to provide a convenient location. Some learning consortia do invest in facilities. Both the Massachusetts High Performance Manufacturing Consortium and the Wisconsin Regional Training Partnership are planning to develop resource centers, and Agile Apparel uses a teaching factory.

down communication barriers, though it might inhibit those at the lower levels from participating as actively.

> *"In a pinch, we could train new workers to use the machines. What we can't do is train workers in the communication skills they need to be problem-solvers on the shop floor. That's what this training program did and that's why it was so successful."*
>
> Joe Rogers
> Stirling Technologies, Inc.
> Southeastern Ohio Learning Consortium

People from all levels of the companies should be included in training. All will have roles and responsibilities in transforming the companies and all will need preparation for these roles. Training programs should be flexible enough to accommodate variations in participants' skill levels.

Using experts from the various companies to instruct particular lessons may be valuable. Frequently, the greatest technical skills reside in front-line employees. Having these people serve as instructors can have value well beyond the knowledge imparted.

"Train-the-trainer" sessions can be an efficient and effective means of delivering training for a consortium, reducing the amount of money member companies need to spend on professional trainers. Through this method, key individuals in each company receive training, and they, in turn, provide training to other employees in their companies. Of course those trained as trainers do not have to restrict their services to their own companies. Consortia could elect to prepare individuals from one company to deliver training to any member company.

All company training programs are faced with the same logistical questions:

- Should training occur on company time, off company time, or some combination?
- If training occurs off of company time, should employees be reimbursed for participating?

Each company will have to answer these questions on its own. Generally, conducting training on company time, or at least paying employees for the extra time they spend in training, makes employees more willing participants. However, many small companies may not be able to keep their operations running if employees are out training and many are operating on too tight a margin to pay overtime for training.

The Industrial Consortium produced an operations manual explaining its process for developing and delivering training. This eased the process significantly — for both the companies and the educational institutions involved.

Networking

Many individuals involved with consortia feel that the networking opportunities the consortia provide are the most valuable benefit. Companies working together to achieve high performance can share problems and develop solutions. Their learning curves are shortened because they gain from the experiences of their fellow companies.

Networking can take place in formal sessions or it can happen informally during seminars and training classes. Formal sessions must be well structured. During these meetings, companies should not only share information about their progress, they should be trying to attain some concrete, well-defined outcomes.

Networking need not only be among companies, it can be among consortia. Service providers can investigate bringing members of their consortium together with members from other consortia to gain new ideas about activities to pursue.

Consulting

No matter how well matched consortium members may be, in the end, the individual companies will have *some* different goals and *some* different needs. The consortium should be prepared to help individual companies follow their own conversion plans and attain the goals they have each set for themselves.

Experts should be brought in to work one-on-one with companies at the appropriate junctures. These experts might need to provide training classes, facilitate group processes, or address complex technical problems. The consortium may be able to retain these experts at discounted rates by securing additional work for them with other consortium members.

Monitoring

While providers will want to do more formal evaluations to determine whether the consortium is meeting the goals set for it, they also need to monitor individual training, networking, and consulting programs on an ongoing basis to ensure that these programs are meeting companies' needs. One way of doing this is to have the company leaders meet for structured "reflection" meetings where they can discuss their impressions of how the programs are progressing.

Another way to monitor progress is to set up meetings between the instructors and company managers so that the two groups can talk directly to each other, voice concerns, and discuss solutions. Building the relationship between company managers and instructors early on is best. Instructors should visit the company sites, even before curricula are developed, to gain a better understanding of employees' work environments and to get to know the managers.

Probably the best source of feedback on the programs is the trainees themselves. Trainees can fill out evaluation forms or participate in informal discussions about the programs on a periodic basis. Of course there is no reason why feedback must take place at set times. Managers and trainees should be invited to communicate any concerns they have about training to the consortium facilitator whenever they arise. Written evaluations from trainees, however, are generally skewed positively and trainees' feelings toward instructors affect how honest they are during verbal feedback periods.

How a provider gathers feedback is not important. What is important is that the provider develop some system of *continual* evaluation, reflection, and program revision to ensure that consortium programs are meeting the companies' needs.

The Southeastern Ohio Learning Consortium has a structured process for continual improvement. Trainees and owners fill out evaluations on a quarterly basis and the facilitator meets with the trainees to discuss their evaluations. Trainees are also convened weekly to discuss the programs and suggest modifications.

35

Keys to Success

- Start with small demonstr[illegible] to make major investments in learning programs until th[illegible]
- Publicize and celebrate early succ[illegible] build momentum and credibility for the consortium's efforts.
- Continually improve and redesign programs and [illegible] from earlier efforts. Build on earlier successes.

BEST COPY AVAILABLE

8. Evaluating the Consortium

Critical Components

- Review
- Collect
- Improve co

While it is important to continually gain feedback and rethink, redesign, and improve the consortium's *programs*, it is also necessary to periodically conduct more comprehensive evaluations measuring the consortium's progress against its stated goals.

Goals

The consortium has different types of goals: for itself, for its individual program components, and for its members. All of these goals need to be reviewed and, if not already, stated in measurable terms. These goals should form the basis of the evaluation.

A consortium focused on training and learning might look for improved company knowledge about training needs; improved access to training; more appropriate, customized training; and lower costs for training than companies would have received on their own. The first three of these are rather subjective, but individuals' perception of these can be measured. Changes in training costs can be measured directly.

Those consortia with broader, community-wide missions might want to measure job generation, industry strength, or economic health that result from companies' shared learning activities. Job generation can be measured directly, production levels can serve as a measure of industry strength, and unemployment levels can serve as a measure of economic health.

> "*Measuring the ease of participating in the consortium is essential.*"
>
> Nancy Renner
> Catonsville Community College

The consortium should also evaluate how well members are working together as a group. Elements to examine include the level of collaboration and the degree of trust among members. Members should also assess how easy it is for them to participate in the consortium. One good measure of the consortium's success is whether or not members want to continue working together.

The consortium may want to conduct more formal evaluations of its individual training and learning programs and components than can be performed as part of program delivery. Such evaluations can provide valuable information for planning future consortium programs. The provider should consider evaluating programs at all four of the levels defined by Kirkpatrick[8]: participant satisfaction, participants' learning gains, partici-

[8]The most widely used model for evaluating training programs is one proposed in 1959 by Donald L. Kirkpatrick. He recently wrote his first book on the topic, *Evaluating Training Programs: The Four Levels* (San Francisco: Berrett-Koehler, 1994).

pants' transfer of learning back to their jobs, and company productivity gains.[9]

The provider should not stop at evaluating the consortium against its own goals, but should also help members assess progress against *their* goals. Member companies' goals may differ, but most likely they will include some variant on improved productivity and profitability. Union members will probably want to measure increases in job retention, job satisfaction, or wages, while educational institutions will probably focus on enlargements in their customer bases, increases in customer satisfaction, and improved linkages with the business community.

Data

There are a number of data sources consortia can use to measure progress toward goals like those suggested above. Service providers can

- Conduct performance or skill assessments of training participants to measure skill and knowledge gains;
- Survey consortium members, including company managers, supervisors, and employees, and representatives of any other member organizations;
- Conduct interviews and focus groups of consortium members, including all of those listed above; and
- Review data from companies (e.g., run rates, scrap rates, customer satisfaction, profit margins); unions (e.g., job retention rates, job satisfaction, wages); educational institutions (e.g., sales, customer satisfaction, business-linked programs); industries (e.g., gross sales, employment); and the community (e.g., employment rate, per capita income).

Data should be collected in the least obtrusive and least costly way possible. To minimize resources needed to collect the data, the provider should search for data already being compiled for other purposes that will demonstrate progress against stated goals. When new data need to be gathered, the provider should try to reduce both the time required for and the number of people involved in the collection.

Consortium

Evaluation should not be viewed as an end in itself, but rather as a means to an end – improving the consortium. Once evaluation results are known, they should be used to review and revise the consortium's activities. This might include the consortium's internal operating procedures, consortium programs, or even member companies' own improvement plans.

[9]For more information on evaluating training programs, see another National Workforce Assistance Collaborative publication: *Assessing the Value of Workforce Training*.

Keys to Success

- Evaluate for multiple groups — the consortium, companies, unions, employees, and educational institutions. All players need to feel satisfied with the results from participation.
- Involve all key stakeholders in defining the measures and the methods for collecting the data. Gain input from people from multiple levels within organizations. Up-front involvement builds support for results.
- Use concrete measures. Consortium members need to be able to clearly evaluate progress toward goals.
- Begin early. The time to *plan* an evaluation is when goals are first being set.
- Evaluate at multiple points in time. Evaluation is not a one-time event. Progress must be measured on a periodic basis.
- Use evaluation results to feed back into program design. Evaluation results have no value in and of themselves. They must be used to improve consortium practices.

9. Building Sustainability

Critical Components

- Buil[illegible]
- Promo[illegible]
- Expand o[illegible]
- Ensure fund[illegible]

Some learning consortia are created with a fixed end point in mind, like helping members to attain ISO 9000 certification. Once their objective is achieved, these consortia might choose to disband. Many learning consortia are focused on continual improvement; their members hope to work together for years. Providers need to help these consortia build sustainability. They should strengthen the consortium's structures, systems, relationships, and resources to promote its longevity.

> *"Joint marketing, joint production, and other group ventures can be key ways in which companies can continue to interact – beyond their initial interest in joint training."*
>
> June Holley
> Southeastern Ohio Learning Consortium

Member Support

A learning consortium will survive only if its members find value in participation. The provider needs to ensure that it is meeting the needs of consortium members. Providers must develop a history of successful service delivery and be able to demonstrate tangible benefits from participation.

Expanding the consortium's purpose may help build member support. The provider might involve member companies in such activities as joint marketing, joint ventures, joint production, or joint contracts.

Member Cohesion

Members must not only support the consortium as individual entities, but also develop a strong sense of "community" among themselves as partners in an enterprise. The provider needs to build a track record of successful *collaboration* efforts. It should work with members to help them create an identity *as a group*.

The provider also needs to keep members apprised both of what the consortium is doing and what the individual members are doing. The provider should document meetings and other consortium activities and disseminate the information to all of the members. In addition, the provider should look for methods to build *interfirm* communication links, such as a "listserv" on the Internet, or programmable fax machines set up to reach every member.

Operational Capability

In most cases, members will have to take responsibility for more and more of the consortium's activities if it is to keep operating. Original funding sources and staff support from outside organizations tend to disappear, or at least be reduced, over time. The provider should work with members to establish solid working structures and build members' skills to prepare the members to take over operations.

The consortium should consider formalizing its organizational structure, creating a working board and councils that can carry out the consortium's functions. Consortia involved in shared production might even want to create some kind of legal structure to increase their customers' sense of security.

Sound operation requires more than solid structures, it also requires well-defined systems. The consortium should develop a clear plan of action and strategies for improvement. It may want to create an operations manual,[10] so that members know the procedures needed to get things done.

The provider should help develop members' capacity to operate the consortium, preparing them to take on both planning and facilitation responsibilities. This cannot be a "one-shot" effort. Members are likely to turn over periodically, so training in the skills needed to run a consortium must be ongoing.

Finally, for those consortia with dedicated facilities, providers will have to prepare members to staff them. This requires not only training, but also a system of sharing the burden among the members.

Funding

Funding may well be the most difficult issue a learning consortium will have to face. Consortia will need to have a stable, reliable base of funding to cover ongoing operations, as well as targeted funding to cover specific consortium activities. If the sole beneficiaries of a consortium are the company members, then these members should, eventually, take on all of the consortium's costs. If, however, there are "externalities" – benefits to other individuals, organizations, or the community – then a consortium might be able to obtain (or retain) outside funding.

> *"Learning consortia should recognize that they may never be self supporting. If their purpose has social value – such as employing dislocated workers or economically disadvantaged individuals, or developing the local economy – then it makes sense for society to bear some of the consortia's costs. If the consortia train individuals eligible for government training programs, then those programs could contribute funds to the consortia."*
>
> Joan Wills
> Institute for Educational Leadership

The stable funding base might be generated from an outside grant, the service provider's organization, or member dues. It may be difficult for a consortium to retain outside funding after it has been in operation for a few years, while it should be easier to get members to pay dues once they have realized a benefit from participating in the consortium. The provider should work at building political and community support for the consortium – from day one – so that the support is readily available when the consortium seeks outside funds.

Consortium *activities* could also be covered from outside funding or from fees paid by members. While a consortium will probably have to begin operations with a very low

[10] A copy of the Industrial Consortium's operations manual is available from Keith W. Bird, New Hampshire Community Technical College, 505 Amherst Street, Nashua, NH 03063; phone 603 882-6923; fax 603 882-8690; e-mail K_BIRD@TEC.NH.US.

fee structure, over time it should be able to raise fees to cover costs if the consortium's activities have value.

Because funding is usually so problematic, the consortium should look for different ways to keep expenses low. Overhead is a good place to look for possible cost reductions. Consortia could transfer some administrative responsibilities to member organizations. They might also look into taking advantage of and using the resources of local business organizations or educational institutions.

> *"Maryland has operated a workforce training program that supplemented companies' training costs. Other states operate similar programs. Consortia should consider applying for such funds for their member companies as a group."*
>
> Nancy Renner
> Catonsville Community College

Keys to Success

- Provide services that are worth the investment of members' time and resources. In the end, it is the members that will have to sustain the consortium, and they will only do so if the consortium provides them with real, tangible benefits.
- Strengthen the links among members. Help members develop a group identity.
- Create a clear organizational structure and put members in charge of it. Members must be able to operate the consortium as a "sideline" of their primary activities — delivering products and services and making a profit.
- Build a financial foundation. The consortium will never be able to run on "soft" money.

Conclusion

Organizing and forming a learning consortium – or any consortium – is not easy. There are many barriers to success, including companies' lack of information and resources. But the barriers can be overcome, and the benefits of a consortium, particularly for small and mid-sized companies, are great.

Barriers

Most firms are unfamiliar with the concept of a learning consortium. They do not know how it works or what its benefits might be. In many cases, companies will be slow to recognize the potential value of becoming part of a consortium.

Small and mid-sized firms can be very isolated. They may not know much about other companies, much less trust them. Since each company knows that *it* is watching out for *its* own self interest, it suspects that is the case for all of the other companies. It will not expect that joining a consortium will change this dynamic and lead to valuable exchanges among companies.

The firms are not likely to have a great deal of trust for government either. For providers with a connection to government, this could be a large handicap to overcome. Companies tend to see government as burdensome. From companies' viewpoints, government requires them to take actions that cut into profits, to file forms which cuts into efficiency, and to pay taxes which takes money out of their pockets. Many companies feel that, even when government tries to *help* them, the potential benefits do not compensate for the aggravation involved.

Small and mid-sized companies operate on a very tight margin. Even if a provider brings along a generous start-up grant, companies will have to invest *something* into

"Fire Control Instruments has realized significant benefits from membership in the Massachusetts High Performance Manufacturing Consortium:

- *A practical needs analysis performed by the Consortium provided insight into the specific, yet changing needs our corporation must address to ensure productivity, profitability, and technological advancement,*
- *The Consortium's targeted training and highly interactive conference provided our company with a knowledge base we could not have afforded on our own, and*
- *On a more personal level, working with other members of the Consortium broadened my knowledge of the issues facing manufacturing corporations and exposed me to a variety of creative solutions others have tried or considered."*

Lois J. Thoms
Fire Control Instruments, Inc.
Massachusetts High Performance Manufacturing Consortium

Agile Apparel introduced modular manufacturing to one of its members. Once successfully instituted
- **Productivity rose 20%, and**
- **Workers' earnings increase 10 to 30%.**

the learning consortium. Companies' lack of time, staff, money, and equipment can be a significant obstacle for the provider to overcome.

Finally, it may be a long time between when a consortium is first initiated and when it begins to show benefits. Companies will need to be convinced that participation will have a positive impact on their bottom lines before they invest much in the effort.

Overcoming Barriers

These barriers, while significant, are not insurmountable. Service providers can organize and support learning consortia by building success into their design and demonstrating success to member companies.

Providers must *gain commitment* from the highest levels within member organizations and *involve* all levels of the organizations in consortium activities. Gaining the full support of members is crucial to success. Providers must make sure that the consortium's goals align with members' goals. Full support is achieved when the consortium's activities meet *members'* needs.

Providers must recognize and address firms' concerns about sharing information with competitors. Companies will participate if they feel their competitive position will not be jeopardized. Addressing this concern might involve restricting consortium membership to noncompetitors, or delegating some issues to one-on-one meetings rather than to group discussions.

Providers should try to build their learning consortia on the success of earlier efforts. They could invite companies they have worked with in the past to join the consortium or even create the consortium out of an earlier collaborative effort. Existing production or marketing consortia could be expanded into learning consortia. Once the consortium is in operation, the provider should seize on each small success and use them to spur members on to even greater achievements.

"Our participation in the Massachusetts High Performance Manufacturing Consortium has resulted in a number of benefits for United Electric Controls:

- *Our employees were able to take a multitude of high-quality courses we could not have afforded on our own,*
- *We were able to purchase an exciting piece of multimedia software to enhance our English as a Second Language (ESL) classroom instruction at a tiny fraction of its retail price, and*
- *Our quality manager has been able to draw on the experience of several consortium members to help him make more informed decisions on the development of our quality system."*

Fred Ritzau and Annie Yu
United Electric Controls
Massachusetts High Performance
Manufacturing Consortium

The provider needs to create a sense of permanence and stability. A clear purpose, structure, and process will give the consortium security. Preparing members to take ownership of the consortium – giving them control of activities – will help secure their continuing involvement and support.

Most important, providers must demonstrate to members that participation in a learning consortium will benefit them directly. Providers must offer concrete value up front, spelling out, clearly and succinctly, the gains that will accrue to members. They must help companies see the whole picture. Not only will the companies be able to obtain customized training they could not otherwise afford, but, by working together, members will be able to become high performance organizations, improving productivity, quality, and profitability.

Bottom Line Benefits

The benefits to be gained from learning consortia are real. Company members attest to lower training costs, better quality training, improved work processes, and increased productivity. While the barriers to forming learning consortia exist, they can be overcome, and they are worth overcoming. Service providers should step up to the challenge.

Appendicies

Approaches to Forming a Learning Consortium

Summary

Creating a Concept

Critical Components

- Determine purpose
- Determine membership

Keys to Success

- Study other consortia. Learn what others have tried in an economy and with industries similar to yours. Find out what has worked, and what has not.
- Know your local economy. Know which businesses and industries are key and what your community's education and training resources are.
- Conduct advance research to determine what would be a "compelling draw" to get your target members into your consortium. Talk with these players informally and find out what their interests in a consortium might be.
- Look for "naturally occurring" associations among companies (e.g., subgroups within business associations, quality improvement groups, supplier networks of large companies).
- Make selections that ensure:
  - A critical mass of organizations.
  - Common needs among the member organizations.
  - Representatives of businesses (and other organizations) that are critical for achieving your purposes.
  - Geographic proximity among the members.
  - Possibly, a large firm or firms as an anchor or starting point for the consortium.

2. Building Membership

Keys to Success

- Build member commitment to the learning consortium. Show members how the consortium will directly benefit them and their organizations.
- Help members to "own" the consortium. They must buy into its purpose and feel that it is *their* consortium, not the provider's.
- Focus on building relationships among the members. The consortium will not be able to do anything unless the members are willing to work together.
- Establish trust. Trust is the foundation upon which a consortium is built.

Critical Components

- Recruit members
- [illegible]
- Build knowledge
- Build trust

3. Creating an Organization

Keys to Success

- Invest sufficient time in institution building. Members must come to an agreement on how decisions will be made and what their responsibilities will be.
- Model the processes of continuous improvement and collaboration. If the learning consortium's goal is to help member companies move toward high performance, the consortium itself should use the high performance processes it is encouraging the companies to adopt.
- Be sure to balance the value of the activities in which you engage members with the time they will have to devote to them. Small and mid-sized companies do not have a lot of time for activities that do not have an immediate impact on their bottom lines.
- Begin work with a pot of money that can be used for up-front development costs. Make use of existing community resources.
- Involve multiple layers of the member organizations in creating the consortium. Success will require encouraging wide-spread participation within member organizations and gaining wide-spread involvement and support from the beginning.

Critical Components

- Create structure
- Hire facilitator
- Procure funding
- Ensure communication

Establishing a Mission and Goals

Keys to Success

Critical Components

- Establish mission
- Establish goals

- Develop a common mission that all members support. Members must feel that they *own* the consortium's mission.
- Be clear about what the consortium hopes to accomplish. Members must be able to gauge the consortium's progress over time.
- Make sure that goals are realistic and achievable. Keep focused. Do not try to be everything to everyone.
- Make sure that members involve multiple layers of their own organizations in discussions about the consortium's mission and goals. Support for the consortium must be strong *throughout* members' organizations. Each member must accept the consortium's mission statement as part of its own operating practices.

Assessing Needs

Keys to Success

Critical Components

- Determine companies' needs
- Conduct measurements

- Involve companies and other stakeholders (such as labor, educational institutions, and other potential providers) in the development of the assessment plan and tools. They will have a lot of insights into what questions need to be asked and how best to get the right answers. In addition, if they are not consulted before the assessment is conducted, they may not give credence to the results.
- Get input on needs from multiple levels within the companies. Those at the top rarely know everything that is going on in a company – or everything that is needed. Gaining involvement before starting an assessment is the best way to ensure widespread support for its results.
- Do not inordinately raise expectations through the assessment. Be sure your questions address issues the consortium members will be willing to deal with.
- Use reliable assessment instruments and methodologies. Faulty results can throw the consortium off track from the beginning.
- Keep individual assessment results confidential. While companies need to know where their employees, *as a whole*, have skill deficits, they do not need to know this on a person-by-person basis (though the consortium trainers will). The little value they might gain from knowing such detailed information will be more than lost by employee animosity and lack of cooperation.

6. Developing a Program

Keys to Success

Critical Components

- [illegible]
- [illegible]
- Develop programs
- Acquire curricula

- Target services at the needs of member companies, as defined by the companies. Learning objectives should not address what educational institutions *think* companies need, they should address the real-world problems companies are facing on a daily basis. Members must control the development and decision-making processes.
- Gain input from, and provide services to, individuals from all levels within the companies. All are likely to be a source of good program ideas, and all will need training and other services to become part of effective, high performance work organizations.
- Build members' capacity to lead the consortium. The more members are able to facilitate themselves, the more they will be able to control their learning experiences, and the more likely they will be able to continue functioning as a group without outside support.
- Continually expand the pool of potential training sources. Open market competition is the best way to ensure that the consortium gets the training it needs at the best possible price.
- Recognize that program development is a dynamic process. Programs must change in response to changes in participant needs and feedback on existing services.

7. Delivering the Program

Keys to Success

Critical Components

- Deliver training
- Facilitate networking
- Provide consulting
- Conduct monitoring

- Start with small demonstrations. Companies will not be willing to make major investments in learning programs until these programs have shown their value.
- Publicize and celebrate early successes. Use these successes to build momentum and credibility for the consortium's efforts.
- Continually improve and redesign programs and services. Learn from earlier efforts. Build on earlier successes.

Evaluating the Consortium

Keys to Success

- Evaluate for multiple groups – the consortium, companies, unions, employees, and educational institutions. All players need to feel satisfied with the results from participation.
- Involve all key stakeholders in defining the measures and the methods for collecting the data. Gain input from people from multiple levels within organizations. Up-front involvement builds support for results.
- Use concrete measures. Consortium members need to be able to clearly evaluate progress toward goals.
- Begin early. The time to *plan* an evaluation is when goals are first being set.
- Evaluate at multiple points in time. Evaluation is not a one-time event. Progress must be measured on a periodic basis.
- Use evaluation results to feed back into program design. Evaluation results have no value in and of themselves. They must be used to improve consortium practices.

Critical Components

- [illegible]
- [illegible]
- Improve consortium

Building Sustainability

Keys to Success

- Provide services that are worth the investment of members' time and resources. In the end, it is the members that will have to sustain the consortium, and they will only do so if the consortium provides them with real, tangible benefits.
- Strengthen the links among members. Help members develop a group identity.
- Create a clear organizational structure and put members in charge of it. Members must be able to operate the consortium as a "sideline" of their primary activities – delivering products and services and making a profit.
- Build a financial foundation. The consortium will never be able to run on "soft" money.

Critical Components

- Build member support
- Promote member cohesion
- Expand operational capability
- Ensure funding

Consortium Examples

Contact Information

Agile Apparel
Eva Schiorring
Garment 2000
School of Applied Science and Technology
City College of San Francisco
1400 Evans Avenue
San Francisco, CA 94124
phone: 415/550-4439
fax: 415/550-4400
e-mail: PMCGUIRE@CCSF.CC.CA.US

The FlexCell Group
Terry Brumett
Terry Brumett, Inc.
P.O. Box 2176
415 Washington Street
Columbus, IN 47202-2176
phone: 812/376-0200
fax: 812/378-3393

The Industrial Consortium
Keith W. Bird
New Hampshire Community Technical College
505 Amherst Street
Nashua, NH 03063
phone: 603/882-6923
fax: 603/882-8690
e-mail: K_BIRD@TEC.NH.US

Labor-Management Council for Economic Renewal
Maureen Sheahan
Labor-Management Council for Economic Renewal
c/o UAW Region 1A
9650 S. Telegraph
Taylor, MI 48180
phone: 313/291-1474
fax: 313/291-2269
e-mail: MAUREEN@SUN470.SME.ORG

Massachusetts High Performance Manufacturing Consortium
Kristie DePrete
Bay State Manufacturing Network Program
Bay State Skills Corporation
101 Summer Street, 2nd Floor
Boston, MA 02110
phone: 617/292-5100
fax: 617/292-5105
e-mail: KDEPRETE@BSSC.ORG

Rhode Island High Performance Learning Consortium
Dan Dangler
Northern Rhode Island Private Industry Council
BVE Office Park - Box 2
640 George Washington Highway
Lincoln, RI 02865
phone: 401/333-3944
fax: 401/334-0585

Southeastern Ohio Learning Consortium
June Holley or Amy Eunice
Appalachian Center for Economic Networks (ACEnet)
94 North Columbus Road
Athens, OH 45701
phone: 614/592-3854
fax: 614/593-5451
e-mail: JHOLLEY@TMN.COM (June Holley) or AA020@SEORF.OHIOU.EDU (Amy Eunice)

The Wisconsin Regional Training Partnership
Rhandi Berth
Wisconsin Regional Training Partnership
4065 North Richards Street
Milwaukee, WI 53212
phone: 414/963-7516
fax: 414/962-3246

The FlexCell Group Mission Statement

To pool and leverage the resources
of several autonomous companies
committed to excellence,

so that we can

Be a single source supplier
of a wide range of quality products and services,
with a focus on meeting and anticipating
the needs of our customers,

by

Offering priority attention, optimum communication,
and a working partnership with our customers,
with the aim of improving their global competitiveness.

Labor-Management Council for Economic Renewal and the UAW Region 1A IPS Labor-Management Council Mission Statement

The Council brings together labor and management in UAW Region 1A and southeast Michigan to increase small and mid-sized firms' competitiveness and enhance the job security and quality of life for all employees through inter-firm cooperation, constructive labor management relations, and by helping worksites provide employees a meaningful voice in the decisions that impact their lives.

The Mission is Carried Out Through the Provision of the Following Services

I. Networking for Learning

One of the Council's most vital functions is to link labor and management representatives with one another so they can share experiences, debate and discuss issues of concern, and learn from each other's successes and mistakes. A variety of options are available.

Semi-Annual Membership Meetings gather scores of people to hear of successful workplace transformations, to listen to expert speakers on subjects of concern, to attend workshops on a variety of topics, and to tour state-of-the-art facilities.

The **Better Practice Task Group** tackles issues that represent major challenges to Council members, and produces publications, organizes trainings, and links members to community resources that can assist them in their change efforts. Mutual gains bargaining, attendance and absenteeism policy and practice, worksite communications, and the role of consultants within small and mid-sized unionized firms are topics addressed by the BPTG.

The **Worksite Health Group** addresses health and safety and employee wellness and assistance concerns. Meetings at member sites focus on the particular interests of the site, while planning trainings, services, and publications for all members.

The **Continuous Improvement Group** rotates among member sites to hear presentations on the labor-management led change efforts at the host location. The Council often develops case studies to capture the learnings of individual workplaces so that all members can read of the lessons that others have gained from experience.

II. Training – On-site or at Magnet Locations

The Council has held over 50 programs in the last five years on topics pertaining to employee involvement, team concept, TQM, health and safety, continuous improvement, the Americans with Disability Act, and employee assistance programming. Through its links with the UAW and other organizations, the Council is able to offer many sessions at no cost. All programs are offered at rates below commercial averages. Over 720 labor and management representatives from 58 worksites and 20 union locals have attended these classes, workshops, and seminars. The Council also responds to requests from worksites for specific training programs, at times providing the training, or by linking member sites with the best providers in our area. The Council has also assisted member firms in receiving funding from the State of Michigan to support workforce training.

III. Consulting

Council staff also provide consulting to labor and management committees – or to work teams or other groups within worksites – which are attempting to transform their relations and their workplaces. Members can receive up to five hours of assistance at no cost per year and the rate is subsidized thereafter. When members are concerned with more intensive consulting assistance, the Council can share information about consultants with proven track records in southeast Michigan.

IV. Publications

The Council has developed an extensive list of case studies, better practice reports, and workshop and presentation summaries covering topics that are crucial to members. In addition, the Council has published the ***Participative Process Manual*** which outlines the questions labor and management representatives must address to forge meaningful change efforts.

V. Links to Community Resources

Local universities, colleges, government agencies, and private providers have worked with the Council in numerous ways to provide members with technical assistance, training and consulting services. With its access to dozens of worksites, community providers are anxious to cooperate with the Council to provide high quality, low cost services. The Council's experience with these institutions, agencies, and companies gives members the opportunity to consider the track record of providers prior to contracting with them.

The Council has assisted members in applying for workforce training and wellness programming grants through the State of Michigan, and is gathering information on Detroit Edison subsidies to firms retrofitting lighting or making other equipment changes that result in energy savings.

Through its participation in **CoNDUIT**, a federally funded project designed to assist small and mid-sized firms in adopting the latest computer information technologies, including CNC, simulation and networking, the Council has expanded its services to include more extensive on-site assessment of operations and relations, access to technical assistance on the Internet, and workshops and other help with the successful compliance with QS9000.

Massachusetts High Performance Manufacturing Consortium Assessment Tool

Questions for facilitating definition and discussion with key management staff including company's CEO or president and/or general plant manager:

1. Where are you going?

2. What does it take to get there?

3. How will you support and reinforce the new behavior or learning within the company?

Agile Apparel Assessment Tool

PART A: COMPANY PROFILE

This part of the Survey provides background information on AGILE APPAREL plants.

1. Business Name ______

A. Headquarters location Street ______
City ______
B. Plant location Street ______
City ______
C. Owner Director Chairman ______

2. Plant History

A. Years in operation ______
B. Years in operation under current ownership ______
C. Is business currently owner operated Yes ______ No ______

3. Plant Area

A. Number of operators ______
B. Number of mechanics technicians ______
C. Number of supervisors ______
D. Types of machines Single ______ Double ______
Overlock ______ Other ______
E. Specialized equipment (please describe) ______

______

4. Additional Processing Capacity

A. Cutting ______
B. Marking grading ______
C. Pressing ______
D. Packaging preticketing ______
E. Quality control ______
F. Direct shipment ______

5. Production Profile

A. Type of production
1. Apparel: bottoms, tops, dresses or outer wear ______

______

2. Other ______

______

B. Volume
1. Capacity in sewing, units per week ______
2. Capacity in cutting ______
3. Capacity in other areas of processing ______

PART B: EXISTING WORKFORCE DEVELOPMENT PROGRAMS

This part of the Survey is designed to identify existing workforce development programs. We need this information in order to document the impact that AGILE APPAREL/GARMENT 2000 has on increasing training programs and opportunities. Please note that Part B includes three sections that document existing training for 1) owners/managers, 2) supervisors, and 3) sewers/technicians/mechanics respectively.

1. During the past three years, has the company invested in workforce development and training? (please circle "yes" or "no")

   Yes   No   If no, proceed to B9

2. Participants in workforce development and training have included (please circle all those involved in training)

   owners/managers   supervisors   sewers/mechanics/technicians

Training for Owners/Managers

3. During the past year, have **owners/managers** enrolled in training/staff development to upgrade/build their skills? (please circle "yes" or "no")

   Yes   No   If no, proceed to question B5

4. Please check the number of hours spent on training for **owners/managers** over the past year

   - ☐ less than 4 hours (one-half day)
   - ☐ between 4 and 8 hours (one-half to one full day)
   - ☐ more than 8 hours but less than 24 hours
   - ☐ more than 24 hours

Training for Supervisors

5. During the past year, have **supervisors** enrolled in training/staff development to upgrade/build their skills? (please circle "yes" or "no")

   Yes   No

6. Please check the number of hours spent on training for **supervisors** over the past year

   - ☐ less than 4 hours (one-half day)
   - ☐ between 4 and 8 hours (one-half to one full day)
   - ☐ more than 8 hours but less than 24 hours
   - ☐ more than 24 hours

Training for Sewers/Technicians/Mechanics

7. During the past year, have **sewers/technicians/mechanics** enrolled in training/staff development to upgrade/build their skills? (please circle "yes" or "no")

   Yes   No   If no, proceed to PART C

8. Please check the number of hours spent on training for **sewers/technicians/mechanics** over the past year

   - ☐ less than 4 hours (one-half day)
   - ☐ between 4 and 8 hours (one-half to one full day)
   - ☐ more than 8 hours but less than 24 hours
   - ☐ more than 24 hours

Obstacles to Training

9. The company would benefit from providing more training to its workers (please circle "yes" or "no")

   Yes   No

10. The main obstacle to providing workforce training is (please rate 1 to 5, "1" being the most important)

    _____ lack of capital
    _____ not sure if time and money invested in training actually pays off
    _____ don't know how to access/find good training and trainers
    _____ afraid training will undermine discipline and order
    _____ other reason, please specify and rate

59

PART C: WORKFORCE TRAINING NEEDS

This part of the Survey is designed to identify and prioritize current training needs. Note that the section is divided into three parts to document the training needs for 1) owners/managers, 2) supervisors, and 3) sewers/technicians/mechanics.

Training for Owners/Managers

1. Training needs for **owners/managers**. Please rate responses from 1 to 12, with "1" being the most important

______ Quality Control
______ Financial Planning and Management
______ Costing
______ Sales and Marketing
______ Equipment Repair and Maintenance
______ Introduction to Private Label Production and Marketing
______ Human Resource Management
______ Facilities Planning
______ Material Utilization and Management
______ Computer Use in Apparel Management
______ Modular Manufacturing: Executive Overview
______ Other, please specify and rate ____

____

2. Please indicate preference for when training for **owners/managers** should be provided. Rate 1 to 4, "1" being the most preferable

______ During the work day
______ After work, evenings
______ Weekends, for example, Saturday mornings
______ Other, please specify ____

Training for Supervisors

3. Training needs for **supervisors.** Rate 1 to 8, "1" being the most preferable

______ Industry Overview, Status, and Current Challenges
______ Supervision and Motivation
______ Introduction to Team Modular Production
______ Equipment Repair and Maintenance
______ Cross Training in Use of Different Sewing Machines
Please specify machines ____
______ ESL VESL
______ Quality Control
______ Other, please specify ____

60

4. Please indicate preference for **when** training for **supervisors** should be provided. Rate 1 to 4, "1" being the most preferable

______ During the work day
______ Evenings, after work
______ Weekends, for example, Saturday mornings
______ Other, please specify ______________________________

5. Indicate preference for **how** training for **supervisors** should be presented. Rate 1 to 3, "1" being the most preferable

______ In 1-2 hour time blocks
______ Half-day sessions
______ Full day sessions

6. Please indicate preference for **where** training for **supervisors** should be offered. Rate 1 to 3, "1" being the most preferable

______ On site
______ Off site, at Teaching Factory
______ Off site, other location, please specify ______________________________

7. Please check to indicate how important it is to have instructors who train supervisors be bilingual

______ Extremely important
______ Very important
______ Important, but not essential
______ Does not matter

Training for Sewers/Technicians/Mechanics

8. Training needed for **sewers/technicians/mechanics**. Please rate 1 to 7, "1" being the most preferable

______ Industrial Sewing Basics, please specify machines ______________________________
____
______ Advanced Sewing Skills, please specify machines ______________________________
____
______ Quality Control
______ Introduction to Team Modular Production
______ Basic Equipment Repair and Maintenance
______ ESL VESL
______ Industry Overview

61

9. Please indicate preference for **when** training for **sewers/technicians/mechanics** should be provided. Rate 1 to 6, "1" being the most preferred

______ During the work day
______ Before work
______ Evenings, after work
______ Weekends, example Saturday mornings
______ Lunch time
______ Other, please specify ______________________________

10. Please indicate preference for **how** training for **sewers/technicians/mechanics** should be presented. Rate 1 to 4, "1" being the most preferred

______ 1-2 hour time blocks
______ Half-day sessions
______ Full day sessions
______ Other, please specify ______________________________

11. Please indicate preference for **where** training for **sewers/technicians/mechanics** should be offered. Rate 1 to 3, "1" being the most preferred

______ On site
______ Off site, at Teaching Factory
______ Off site, other location, please specify ______________________________

12. Please indicate how essential it is for instructors who train **sewers/technicians/mechanics** to be bilingual

______ Extremely important
______ Very important
______ Important, but not essential
______ Does not matter

PART D: EQUIPMENT STATUS AND NEED

This part of the survey is designed to assess AGILE APPAREL participants' current equipment use and capabilities.

1. **Current equipment.** Please check the response which best describes the status of your current equipment

______ Most equipment purchased within last 3 years
______ Most equipment is more than 5 years old
______ Current equipment is combination of new and used

62

2. **Equipment maintenance.** Please check the response(s) which best describe your current equipment maintenance strategy

______ Equipment is maintained on an as need basis
______ Equipment is maintained on a scheduled basis
______ Regular maintenance and cleaning are done by a company mechanic
______ Regular maintenance and cleaning are done by an outside mechanic
______ Minor repair and cleaning are done by sewers or floor supervisor

3. **Equipment repair.** Please rate from 1 to 4 who most often does repairs with "1" being the person who does it most frequently

______ Company Mechanic
______ Outside Mechanic
______ Floor Supervisor
______ Machine Operator

4. Please rate the criteria for making an equipment purchase. Rate responses 1 to 5, "1" being the most important

______ Replacement equipment
______ Equipment obsolescence
______ Expanded production needs
______ Manufacturer specified
______ Other, please specify ______________________________

5. Please rate responses regarding equipment purchases NOT made. Rate 1 to 6, "1" being the most common reason

______ Current production does not justify expense
______ Equipment difficult to operate
______ Desired equipment model not available
______ Secondhand model, currently not available
______ Equipment too expensive
______ Other, please specify ______________________________

6. Have you ever looked into Small Business loans in order to make capital improvements?

______ Yes
______ No

63

Footnoted Resources

High Performance Work Practices

Employee Empowered. Workers are empowered with the knowledge and skills on all facets of work processes and business goals and actively participate in organizational decision-making.

Work Teams. Work is organized into self-managing units whose job boundaries cut across traditional organizational lines. Supervisors act as coaches and mentors. Workers are responsible for both production processes and organizational duties such as hiring and scheduling.

Employee-Centered Workplace Policies. Workers are viewed as an asset. The corporate culture is supportive, flexible, and sensitive to the needs of workers. Diversity is valued. Companies strive to create safe and healthy workplaces sensitive to worker family demands.

Continuous Innovation/Improvement. Innovation is market driven and organizations continuously strive to improve the quality and timeliness of new products. Various departments collaborate in new product development establishing a system of concurrent innovation.

Customer- and Worker-Driven Quality. Quality and customer needs are the major drivers of change, with zero defects as the goal. Quality is continuously measured by workers and results are fed back to all.

Tools for Competitiveness. Measurement tools used by workers, such as statistical process control and benchmarking, are critical to gauging internal performance and external competition.

Flexible Production Processes. Leading-edge technology is implemented as a complement to the skills and knowledge of workers. New technology and production methods provide the ability to introduce new products quickly and to produce a greater variety of products in lower volumes. Tightly integrated systems provide "real time" information to the shopfloor.

New Worker Skills. Work requires creative thinking, self motivation, and academic basics. Problem solving, decision-making, business, financial, negotiations, and interpersonal skills, in addition to technical skills are essential for workers.

Worker/Management Cooperation. Relationships are based on mutual interests and a cooperative approach to problem solving. Brief "compacts" outline the collaborative relationship between workers and management.

Innovative Compensation Plans. Pay increases based on skill attainment and/or performance. Systems reward worker contributions, such as teamwork and quality.

External Partnerships. Strategic alliances with suppliers and customers provide feedback and collaboration to increase quality and productivity. Networks of industries and corporations encourage information sharing and co-innovation.

Office of the American Workplace
U.S. Department of Labor

64

Skills Required for Effective Participation within a Learning Consortium

Engagement Skills

- Constructive communications
- Active listening
- Cooperative participation
- Effective feedback
- Constructive conflict resolution
- Mutual gains bargaining

Personal Skills

- Flexibility
- Patience
- Cooperation
- Open mindedness
- Ability to tolerate ambiguity

Process Skills

- Vision development
- Long-term planning
- Consensus building
- Structured problem solving
- Reconciliation of conflicting information
- Long-term implementation
- Synthesization of key points
- Inference of action steps

Note: This list was compiled from suggestions made by Dan Dangler, Stephen Mitchell, Maureen Sheahan, Johan Uvin, and Joan Wills.

65

National Workforce Assistance Collaborative's Best Practice Guidelines

Employee Training

Employee training supports adaptive, productive workplaces that capitalize on investments in both technology and workforce skills to boost productivity. Employee training is firm-focused and is a key element of a firm's overall performance improvement plan. Training assists a firm to achieve

- Effective utilization of technology resources;
- Decentralized decision making;
- Improved work processes by measurably improving worker knowledge, skills, and ability;
- Full customer satisfaction and profitability.

Training links technical, occupation-specific skills development with broad-based foundational skills such as teamwork, problem solving, leadership and initiative, resource allocation, customer service, communications, and commitment to lifelong learning to meet the requirements of today's and tomorrow's workplace. In large companies, employee training is often provided by internal staff; in small and mid-sized companies, training is usually provided by a third-party supplier.

Best practice employee training programs seem to share a number of characteristics:

1. Training objectives are tied to company business objectives and industry skill standards, where these exist.

1.1 Training objectives are derived from and continuously aligned with the company's overall performance objectives and specific job requirements.

1.2 Training success is tied to the attainment of performance-based, measurable learning objectives that are linked to industry skill standards, where these exist.

1.3 Programs are developed with input from clients, management, supervisors, and employees or their representatives.

2. Training curricula, structure, and delivery methods reflect the workplace and its requirements.

2.1 Training curricula, structure, and delivery methods are appropriate to the company's organizational structure, work processes, and culture and training activities incorporate and draw on company work processes, tasks, and materials.

2.2 Training addresses both occupational skill requirements and the academic or foundational knowledge, skills, and behaviors that underlie them.

2.3 Training supports forms of work organization that emphasize broadening worker skills and empowering employees.

2.4 Training activities are interactive and experiential and include regular opportunities to integrate the knowledge and skills learned into solving problems commonly encountered on the job.

2.5 Training is modular so it can be adapted to workplace schedules.

2.6 Training is delivered "just in time."

2.7 Training uses technology and materials that are comparable to those used on the job.

2.8 Training is reinforced on the job once students return to their work sites.

3. Training is tailored to trainee needs and learning styles.

3.1 Training is developed based upon an assessment of the target population's knowledge, skills, and abilities.

3.2 Training meets individual skill development needs as reflected in an individualized development plan (based on each trainee's own skill levels and training goals).

3.3 Training uses a variety of instructional methods and media, allowing for differences in the learning styles of individual students.

3.4 Training structure allows students to learn at their own pace.

3.5 Training builds the learner's ability to transfer skills to different work settings.

3.6 Training builds worker understanding that learning is an integral and ongoing component of successful work performance.

3.7 Successful training completion results in a portable credential for the learner.

4. High quality assessment is an integral part of the training.

4.1 Assessments used are valid and reliable indicators of job performance.

4.2 Expected performance outcomes and assessment methods are clearly communicated to trainees.

4.3 Learner needs are assessed prior to training and inform the learner's individualized training plan.

4.4 Trainees are provided regular, ongoing feedback concerning their progress while in the training program.

4.5 Trainees are assessed at the completion of training to ascertain learning gains and overall program performance.

5. Training staff is highly skilled and well trained.

5.1 Instructional staff is well-versed in job performance requirements and has industry-based experience.

5.2 Staff apply the principles of adult learning to instructional design and delivery.

6. Evaluation is used to assure training quality.

6.1 Training is evaluated based on both performance outcomes and the quality and effectiveness of the training process.

6.2 Management, supervisors, employees, and, in unionized work forces, union representatives participate in evaluating program effectiveness and responsiveness to their needs.

6.3 Evaluations are conducted regularly to ensure that the training program remains on track.

Louise Bertsche
Employee Training Advisory Council
National Workforce Assistance Collaborative

Labor-Management Relations

Labor-management relations encompasses the mutual *relationship* between an organization's employer and employees, and in unionized workplaces, their union representatives. Labor-management relations deals with:

- The *policies and practices* governing the employees' *relationship* to the company, to the job, and to his or her colleagues; and
- The *process* for establishing and modifying these policies and practices.

Best practice labor management relations programs share the following characteristics:

RELATIONSHIPS

1. **Policies and practices governing employees' relationship to the company demonstrate respect and value for employees and their representative organizations, and promote mutual trust.**

    1.1 Basic terms of employment are fair and equitable. Pay and benefits will: a) be at or above market rates, b) reflect the employer's ability to pay, and c) make employees partners in the creation and distribution of wealth.

    1.2 There is a long-term commitment to the partnership reflected in efforts to ensure employment security. The company helps employees assess their skills and explore job alternatives, facilitates lifelong learning and job movement, and, if it comes to that, supports no-fault exits.

    1.3 The work environment supports a high quality of work life and ensures employees' health and safety.

2. **Policies and practices governing employees' relationship to the job stimulate pride in work.**

    2.1 All workers are trained to know what the business is about, the challenges the company faces, and the contribution they make to the company's productivity.

    2.2 There is individual and collective involvement in problem solving at all levels of the company.

    2.3 There is individual and collective involvement in decision making related to management systems (plant & equipment, quality & product, organization & procedures, planning process).

    2.4 Ongoing professional development and technical training strategies equip workers with a broad range of skills to increase labor flexibility, develop employees' capacity, and maximize employees' contribution.

    2.5 The organization of work promotes employee skill development, commitment, responsibility, flexibility, and organizational productivity.

    2.6 Employees are compensated based on the skills and experience they possess.

3. **Policies and practices governing employees' relationship to colleagues ensure there is no disadvantage to any individual or groups of employees.**

    3.1 Policies and practices minimize social and economic distinctions between management and other employees.

    3.2 Issue resolution systems provide due process, allow free speech, and provide the ability to confront those in authority.

PROCESS

4. **The process for establishing and modifying the policies and practices governing the employees' relationship to the company, to the job, to his or her colleagues, and to the success of the firm builds commitment by both labor and management to improve individual and firm performance.**

4.1 Development and modification of policies and practices governing the employees' relationship to the company, to the job, to his or her colleagues, and to the success of the firm is conducted in an atmosphere of mutual respect, trust, and good will. In unionized firms, the process of development and modification has a foundation of partnership reflected in a professional approach to the collective bargaining process.

4.2 The involvement and commitment of management and workers from the outset (and in unionized firms, their unions) is integral to the development and modification of policies and practices.

4.3 Consultation occurs between and among management and workers (and in unionized firms, their unions) during the process of identifying the issues that need to be addressed in establishing and modifying policies and practices, and in setting the objectives that the company wishes to achieve. The consultation also focuses on the evaluation of the options available to address the issues identified, the changes required, and the means and timing of their implementation.

4.4 Development and modification of policies and practices is designed to elicit input to the final agreement from all parties through two-way communication and negotiation. It is supplemented by communication mechanisms that distribute relevant information throughout the organization to receive feedback from all of the workforce. (In unionized firms, this feedback is channeled through worker representatives as well.) There is full and complete information disclosure so that employees can participate as equal partners.

4.5 Development and modification of policies and practices takes account of human value, the need to increase productivity, and customer requirements.

4.6 Development and modification of policies and practices is future directed and value driven, not rule driven or position driven.

4.7 Monitoring and review of the performance of the workplace is ongoing. Through a consultative and problem solving process, policies and practices are adopted and changed to continually improve the status of the labor-management partnership.

4.8 In unionized firms, there is a recognition that the union is an independent source of power for workers that protects employees' interests in the workplace and helps to equalize the power relationship with management by providing a representative structure, ensuring a meaningful voice, promoting employment security and positive rewards, and promoting and ensuring continuous learning and skill enhancement.

4.9 The rights of employees to select representatives of their own choosing is recognized at both unionized and unrepresented workplaces as integral to all aspects of a democratic, high performance workplace.

4.10 There is a comprehensive training and development program to assist both workers and managers to acquire the communication, interpersonal, group, and industrial relations skills needed to develop and implement best practice policies and practices.

Stephen Mitchell
Labor-Management Relations Advisory Council
National Workforce Assistance Collaborative

Work Restructuring

Work restructuring refers to the changes organizations make in planning, structuring, managing, and executing work to improve quality, productivity, cycle time, customer satisfaction, and employee satisfaction.

Work restructuring is the collective set of decisions and processes by which continuous improvements and breakthrough opportunities are accomplished. Leadership creates a collaborative environment and designs work processes so that employees, individually and in teams, can efficiently and effectively anticipate and satisfy customer needs.

Best practice indicators and descriptors of work restructuring:

1. **The organization articulates a vision and long-term, strategic direction, based on understanding current and potential markets, competitors, and customer needs.**

   1.1 Environmental scanning, competitor analysis, market positioning studies, and customer feedback are used to articulate a vision and set a long-term strategic direction.

   1.2 Investments in research and product development are made to maintain or increase competitive advantage.

   1.3 New business opportunities are aggressively sought to increase market share.

2. **Leadership is a shared responsibility, focused on achieving the organization's vision and mission.**

   2.1 Senior managers demonstrate, through overt and sustained actions, their commitment to the organization's purpose and the value they place on their employees.

   2.2 Employees are engaged collaboratively in contributing to the organization's vision, mission, and goals.

   2.3 All employees can relate their jobs to the company's purpose and goals.

   2.4 Ultimately leadership is assumed by every employee in enhancing the survival, success, and quality of work life of the company.

3. **Work is designed, managed, and realigned into work processes to achieve organizational goals that are customer focused.**

   3.1 The basic unit of work shifts from performing discrete tasks to managing processes or sub-processes.

   3.2 Time and resources initially devoted to inspecting for errors are spent in preventing their occurrence.

   3.3 Human resource management processes that are consistent with the organization's goals govern hiring, compensation, promotion, incentive, and recognition practices.

   3.4 An organizational assessment (e.g., the Baldrige Award criteria) is used to align work processes and to make improvements in an ongoing, systemic fashion.

   3.5 The organization develops long-term relationships with suppliers to achieve organizational goals that enhance work and are customer focused.

4. **Information is generated, shared, and communicated routinely (horizontally and vertically) throughout the entire organization as a means to maximize organizational effectiveness.**

4.1 Customer input and customer-related data are used continuously to make key business decisions.

4.2 Performance data are shared openly and routinely throughout the organization and information is maintained in ways that encourage and facilitate employee access.

4.3 Employees respect the confidentiality of such data and use the information to make key decisions affecting their work.

4.4 Effective internal and external communications systems and processes connect employees to their suppliers and customers.

4.5 Management information systems and other forms of technology are used to support all employees in performing their jobs successfully.

5. **Training and other learning opportunities, consistent with changes in work, are provided to all employees so they can succeed in assuming new responsibilities.**

5.1 Employees at all levels learn to work collaboratively in internal and cross-functional teams, facilitate and participate in effective meetings, and use quality processes and decision-making tools that enhance organizational performance.

5.2 Managers learn to act as coaches and facilitators for the employees in their own work units; they also learn ways to enhance collaborative decision making across units.

5.3 Technology is used in ways that enhance employee skills and performance.

5.4 Learning opportunities are designed to minimize disruption; build on existing employee knowledge, skills, and insights; and are timed to enhance successful application.

6. **Employees have the backing of organizational policies and practices to take action, including risks, that meet and exceed customer needs.**

6.1 Individuals at all organizational levels are encouraged to act in meeting customer needs.

6.2 Teams are used frequently to address organizational priorities and empowered to act on their recommendations.

6.3 Feedback from employee and team evaluations are used consistently to make key decisions and improve performance.

6.4 Incentives, including promotions and rewards, are aligned with organizational goals and internal and external customer requirements.

6.5 Accountability measures are developed and implemented in ways that enable employees to meet organizational goals and satisfy their customers.

7. **Results and best practices are assessed continuously to improve work processes and organizational effectiveness.**

7.1 The organization routinely collects, analyzes, and uses customer and performance data to determine progress and success.

7.2 The organization keeps track of key performance measures over time so that it can assess its long-term performance.

7.3 The organization benchmarks key work processes against industry leaders as well as high performing organizations from other industries and sectors to identify improvement opportunities.

7.4 The organization sets "stretch goals" as a way to escalate improvement in its own performance.

7.5 Ultimately, the quest to improve continuously in its ability to satisfy internal and external customers becomes the organization's way of doing business.

Peggy Siegel
Work Restructuring Advisory Council
National Workforce Assistance Collaborative

Workplace Literacy

Workplace literacy encompasses the basic and higher-order skills individuals need to function in the workplace. Using the definition of literacy contained in the National Literacy Act of 1991, *workplace literacy* is an individual's ability to read, write, and speak in English, and compute and solve problems at levels of proficiency necessary to function on the job.

The most effective workplace literacy programs use the workplace as the context for instruction, and take account of workers' skills, knowledge, and interests in training design and delivery. This "functional context" approach has benefits for both companies and employees. The approach

- Increases participants' *motivation* to learn, because they can see the value and applicability of the training;
- Increases participants' *ability* to learn, because the concepts being taught are less abstract; and
- Increases training's *return to the company*, because it is easier for individuals to transfer learning back to their jobs.

Best practice workplace literacy programs seem to share a number of characteristics:

1. Training objectives are tied to company business objectives, and reflect company, employee, and customer needs.

1.1 Human resource development is part of the company's overall business strategy and links employees' continuous learning with the company's continuous improvement efforts.

1.2 Training objectives are derived from the company's overall performance objectives, workplace practices, and job requirements.

1.3 Training gives workers the skills to continue their learning and transfer knowledge or skills from one work situation to another.

1.4 Programs are developed with input from management, supervisors, employees, and, where applicable, union representatives.

2. Workplace literacy training curricula, structure, and delivery methods reflect the workplace and its requirements.

2.1 Training encompasses the basic and higher-order skills needed to meet company goals and customer needs and carry out company work processes and job tasks, including the skills needed to solve problems, work in teams, and make decisions related to products and processes affecting employees' work.

2.2 Training activities incorporate and draw on company work processes, tasks, and materials, and training media makes use of company technology and equipment.

2.3 Training activities include regular opportunities to integrate the knowledge and skills learned into solving problems commonly encountered on the job.

2.4 Training builds worker understanding that learning is an integral and ongoing component of successful work performance and fosters a desire for continued learning which can benefit other aspects of the learners' lives.

2.5 When possible, delivery links or integrates literacy skills training with other training required in the workplace.

3. **Workplace literacy training is tailored to trainee needs.**

3.1 Training is developed based upon an assessment of the target population's knowledge, skills, abilities, attitudes, and behaviors.

3.2 Training structure allows participants to learn at their own pace.

3.3 Training uses a variety of instructional methods and media, allowing for differences in the learning styles and the ethnic, linguistic, and cultural backgrounds of individual trainees.

3.4 Training meets individual skill development needs, as defined by each trainee's own skill levels and training goals.

3.5 Training success is tied to the attainment of learning objectives, not the amount of time spent in training.

4. **Assessment is customized to workplace requirements.**

4.1 Assessments used are valid for training purposes and reliable indicators of the literacy skills required in the workplace.

4.2 Expected performance outcomes and assessment methods are clearly communicated to participants.

4.3 Trainees are provided regular, ongoing feedback concerning their progress while in the training program.

4.4 Each participant's needs, interests, and abilities are assessed prior to training and inform the participant's individualized training plan.

4.5 Participants are assessed during training so that needed changes can be made in their training plans.

4.6 Trainees are assessed at the completion of training to ascertain learning gains and overall program performance.

5. **Program delivery is flexible and encourages and facilitates employee participation.**

5.1 Marketing and promotion strategies are designed to help employees understand how the program will be implemented and to encourage and reward employees for participation and retention.

5.2 Employees who complete training successfully are recognized and rewarded for their achievement.

5.3 Training sessions are held at times and in locations convenient to employees.

5.4 Training is modular so it can be adapted to workplace schedules.

5.5 Confidentiality of employees' assessment results and training participation is assured in order to limit any discomfort employees may feel about participating in literacy training and to avoid adverse employment effects.

6. **Staff involved in the development and delivery of programs are highly skilled and well trained.**

6.1 Staff have an understanding of adult learning, adult education principles, and literacy instruction.

6.2 Staff, either singly or as a team, have skills in program administration, marketing, negotiating, literacy skills analysis, curriculum development and instruction, education counseling, assessment, and evaluation.

6.3 Staff are knowledgeable about the corporate environment and how to work with individuals at all levels of the company.

6.4 Staff are skilled in working with the various ethnic, linguistic, and cultural backgrounds of employees.

6.5 Staff themselves are well trained through preparatory and on-the-job training, and continuous skills upgrading.

7. Evaluation is used to assure training quality.

7.1 Multiple evaluation measures are used to gauge participant satisfaction, performance gains, and the quality and effectiveness of the training process.

7.2 Management, supervisors, employees, and, where applicable, union representatives participate in evaluating program effectiveness and its responsiveness to their needs.

7.3 Evaluations are conducted regularly to inform and revise the training program and to ensure that the training program is meeting its objectives.

Terri Bergman
Workplace Literacy Advisory Council
National Workforce Assistance Collaborative

75

Resource Lists

Organizations

Collaborative Strategies, Inc. Gregg A. Lichtenstein, Collaborative Strategies, Inc., 7348 Malvern Avenue, Philadelphia, PA 19151-2209; phone and fax 215/473-5393; e-mail LICHTENSTEIN@CONNECTINC.COM.

National Workforce Assistance Collaborative. Terri Bergman, National Alliance of Business, 1201 New York Avenue, NW, Washington, DC 20005; phone 202/289-2930; fax 202/289-1303; e-mail TERRI_L._BERGMAN@NAB.COM.

USNet. Regional Technology Strategies, P.O. Box 9005, Chapel Hill, NC 27515-9005; phone 919/933-6699; fax 919/933-6688; e-mail SAR218@CONNECTINC.COM.

76

Materials

American Society for Quality Control, *Quality Management and Quality Assurance Standards – Guidelines for the Application of ANSI/ASQC Q9001-1994 or Q9002-1994 to Education and Training Institutions* (Milwaukee: American Society for Quality Control, 1994, draft).

Andrews, William G., Keith W. Bird, and Eric Brown, *The Industrial Consortium Strategy: A Successful Cooperative Effort Involving Education and Business* (Manchester, NH: New Hampshire College and University Council).

British Columbia Trade Development Corporation, *Flexible Networks in Theory and Practice: How and Why to Set Up Flexible Networks in British Columbia* (Vancouver, BC, Canada: BC Trade Development Corporation).

Corporation for Enterprise Development, *The Association Challenge: Member Services for Global Manufacturing Competitiveness* (Washington, DC: Corporation for Enterprise Development, 1992).

Corporation for Enterprise Development, *The Entrepreneurial Economy* (Washington, DC: Corporation for Enterprise Development, July/August 1987).

Corporation for Enterprise Development, *The Entrepreneurial Economy Review* (Washington, DC: Corporation for Enterprise Development, Spring 1991).

Gomes-Casseres, Benjamin, *Group Versus Group: How Alliance Networks Compete* (Boston, MA: Harvard Business Review, reprint number: 94402, July/August 1994).

Hatch, C. Richard, *Flexible Manufacturing Networks: Cooperation for Competitiveness in a Global Economy* (Washington, DC: Corporation for Enterprise Development, 1988).

Hatch, C. Richard, *The Network Brokers Handbook: An Entrepreneurial Guide to Cooperative Strategies for Manufacturing Competitiveness* (Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology, Manufacturing Extension Partnership, 1995).

Johnston, Russel, and Paul R. Lawrence, *Beyond Vertical Integration – The Rise of the Value-Adding Partnership* (Boston, MA: Harvard Business Review, reprint number: 88407, July/August 1988).

Kanter, Rosabeth Moss, *Collaborative Advantage: The Art of Alliances* (Boston, MA: Harvard Business Review, reprint number: 94405, July/August 1994).

Lipnack, Jessica, and Jeffery Stamps, *The Art of The Network* (1994).

Lipnack, Jessica, and Jeffery Stamps, *The TeamNet Factor: Bringing the Power of Boundary Crossing into the Heart of Your Business* (Essex Junction, VT: Oliver Wight Publications 1993).

Malnight, Jim, *Beyond Theory: A Practitioner's Approach to Networking* (Grand Rapids, MI: The Malnight Company, 1992).

77

Montreuil, Benoit, Diane Poulin, and Stephane Gauvin, *The Network Enterprise Approach* (Quebec, Canada: Groupe de Recherche en Gestion de la Logistique, Universite Laval).

Moody, Patricia E., *Breakthrough Partnering: Creating a Collective Enterprise Advantage* (Essex Junction, VT: Oliver Wight Publications, Inc., 1993).

National Workforce Assistance Collaborative, *Assessing an Organization's Training Needs* (Washington, DC: National Alliance of Business, 1995, forthcoming).

National Workforce Assistance Collaborative, *Assessing the Value of Workforce Training* (Washington, DC: National Alliance of Business, 1995, forthcoming).

National Workforce Assistance Collaborative, *Delivering Cost Effective Services to Small and Mid-Sized Companies* (Washington, DC: National Alliance of Business, 1995, forthcoming).

National Workforce Assistance Collaborative, *Integrated Service Delivery* (Washington, DC: National Alliance of Business, 1995, forthcoming).

National Workforce Assistance Collaborative, *Resource Guide: A Key to Organizations Working in Employee Training, Labor-Management Relations, Work Restructuring, and Workplace Literacy* (Washington, DC: National Alliance of Business, 1995).

Nohria, Nitin, and Robert Eccles, *Networks and Organizations* (1992).

Northwest Policy Center, *Entrepreneurial Strategies: Readings on Flexible Manufacturing Networks* (Seattle, WA: Northwest Policy Center, 1992).

Parker, Eric and Joel Rogers, *The Wisconsin Regional Training Partnership: Lessons for National Policy* (Preliminary Report to the National Center on the Workplace, January 1995).

Pyke, Frank, *Industrial Development through Small-Firm Cooperation: Theory and Practice*, (Albany, NY: Boyd Printing Company, 1992).

Regional Technology Strategies, *Firm Connections* (bi-monthly newsletter) (Chapel Hill, NC: Regional Technology Strategies).

Rinehart, Eric, *Manufacturer Networks as a Competitive Strategy* (Springfield, IL: Illinois Department of Commerce and Community Affairs, 1991).

Rosenfeld, Stuart, and Brian Bosworth, *Significant Others: Exploring the Potential of Manufacturing Networks* (Chapel Hill, NC: Regional Technology Strategies, Inc., 1993).

Rosenfeld, Stuart, C. Richard Hatch, and Ray Daffner, *Industrial Modernization: Collaborative Strategies for Regional Development in the South* (Research Triangle Park, NC: Southern Technology Council, December, 1991).

Roy, Philippe, *Vision for a Nation – Business Networks: Competitive Advantage for Small- and Medium-Sized Enterprise to Strategically Build the "New Economy" for the Twenty-First Century – Innovation, Technology, Exports, Jobs* (Ontario, Canada: Industry Science and Technology, 1994).

Sommers, Paul, *Building Industrial Networks: Learning from Broker Experience* (Gaithersburg, MD: National Institute of Standards and Technology, 1992).

Sommers, Paul, *Flexible Manufacturing Networks: What, Who, Why, and How?* (computer software) (Seattle, WA: Northwest Policy Center, 1992).

Southern Technology Council, *Dialogue of Flexible Manufacturing Networks* (Research Triangle Park, NC: Southern Technology Council, 1990).

Transit Media Communications, *Flexible Business Networks: Cooperating to Compete in the Global Marketplace* (video) (Franklin Lakes, NJ: Transit Media Communications).

National Workforce Assistance Collaborative

Advisory Groups

Stephen Mitchell
Project Director

Terri Bergman
Products and Services Manager

Board

Chair
William H. Kolberg
National Alliance of Business

Eunice Askov
Institute for the Study of Adult Literacy, The Pennsylvania State University

William L. Batt, Jr.
Consultant

Robert Baugh
Human Resource Development Institute

Clair Brown
National Center for the Workplace

Robert Fien
Stone Construction Equipment, Inc.

Evelyn Ganzglass
National Governors' Association

Marshall Goldberg
The Alliance for Employee Growth & Development, Inc.

Andy Hartman
National Institute for Literacy

Cathy Kramer
Association for Quality and Participation

David Pierce
American Association of Community Colleges

Jack Russell
The Modernization Forum

Benjamin Schneider
University of Maryland

Dennis Sienko
Consultant

Stephen Sleigh
International Association of Machinists

Pamela Tate
Council for Adult and Experiential Learning

Hugh Tranum
National Labor-Management Association

Benjamin Tregoe
Kepner-Tregoe, Inc.

Thomas Tuttle
Maryland Center for Quality and Productivity

Joan Wills
Institute for Educational Leadership

John Zimmerman
MCI

Employee Training

Chair
Pamela Tate
Council for Adult and Experiential Learning

Brian Bosworth
Regional Technology Strategies

Thomas L. Clogston
Boeing Defense and Space Group

Kenneth Edwards
International Brotherhood of Electrical Workers

Phyllis Eisen
National Association of Manufacturers

Wendell Fletcher
Congressional Office of Technology Assessment

Patti Glenn
Texas Instruments

Ruth Haines
National Institute of Standards and Technology

Janet Steele Holloway
Kentucky Small Business Development Center

John Hoops
Consultant

Tom Huberty
Upper Mid-West Manufacturing Technology Center

Dan Hull
The Center for Occupational Research and Development

Victoria Kraeling
Southeastern Institute for Advanced Technologies

Arny Manseth
US West

Alfred Moye
Hewlett Packard

Frederic Nichols
National Coalition for Advanced Manufacturing

Joan Patterson
UAW Chrysler National Training Center

Paula Reeder
Sallie Mae

Martha Reesman
National Center for Manufacturing Sciences

Lee M. Shrader, Jr.
Great Lakes Manufacturing Technology Center

Duc-Le To
U.S. Department of Education

Labor-Management Relations

Chair
Hugh Tranum
National Labor-Management Association

Nick Argona
Xerox Corporation

William L. Batt, Jr.
Consultant

Betty Bednarczyk
SEIU-Local 13

Barry Bluestone
University of Massachusetts

Rena Cross
Foamade Industries

Joel Cutcher-Gershenfield
Michigan State University

David Fontaine
Maryland Alliance for Labor-Management Cooperation

Pat France
Stark County Labor-Management Council

Robert Frey
The CIN-MADE Corporation

Maria Heidkamp
Wisconsin Labor-Management Council

Edsel Jones
Mapleton Local No. 7-7807

Robert Landsman
New York State School of Industrial and Labor Relations

Malcolm Lovell
National Planning Association

Charlene Powell
Kentucky Association of Labor-Management Committees

John Stepp
Restructuring Associates

Brian Turner
Work and Technology Institute

Earl Willford
Bureau of Mediation Services

81

Work Restructuring

Chair
Thomas Tuttle
Maryland Center for Quality and Productivity

Eileen Appelbaum
Economic Policy Institute

Mike Beyerlein
The Center for the Study of Work Teams

Jane Reese Coulbourne
Restructuring Associates, Inc.

John Dodd
Computer Science Corporation

Ned Ellington
Productivity and Quality Center

Michael Galiazzo
Regional Manufacturing Institute

Debbie Goldman
Communications Workers of America

Bruce Herman
Garment Industry Development Corporation

Robert King
Goal QPC

Vaughn Limbrick
Society for Human Resource Management

Peter Manella
New York State Department of Economic Development

Arley Mead
Harford Systems, Inc.

Robert Meyer
Work in Northeast Ohio

Joe Rigali
Sanden International, USA

Jill Scheldrup
U.S. Chamber of Commerce

Maureen Sheahan
Labor-Management Council for Economic Renewal

Peggy Siegel
National Alliance of Business

Audrey Theis
Maryland Department of Economic and Employment Development

Edwin Toussaint
Xerox Corporation

Workplace Literacy

Chair
Eunice Askov
Institute for the Study of Adult Literacy, The Pennsylvania State University

Judith Alamprese
COSMOS Corporation

Lorraine Amico
National Governors' Association

Dale Brandenburg
Wayne State University

Linx (Helen) Crouch
Literacy Volunteers of America

Regina Guaraldi
Miami-Dade Community College

Karl O. Haigler
The Salem Company

Mary Ann Jackson
Wisconsin Technical College Board

Inaam Mansoor
REEP

Donna Miller-Parker
State Board for Community and Technical Colleges

Michael O'Brian
CertainTeed Corporation

James Parker
U.S. Department of Education

James Ryan
District 1199C

Anthony Sarmiento
AFL-CIO

Johan Uvin
Massachusetts Adult and Community Learning Services

Robert Visdos
NETWORK

Jo Ann Weinberger
Center for Literacy, Inc.

Products and Services

The **National Workforce Assistance Collaborative** offers an array of products and services providing information and assistance in four areas: employee training, labor-management relations, work restructuring, and workplace literacy.

Resource Listings

- *Resource Guide: A Key to Organizations Working in Employee Training, Labor-Management Relations, Work Restructuring, and Workplace Literacy* – A listing of national membership organizations and state program offices supporting workplace and workforce changes.

- *Workplace Literacy Publications: An Annotated Bibliography of Print Resources* – A workplace literacy bibliography.

Newsletters

- *Workforce Briefs* – A series of newsletters for businesses. Initial newsletters focus on: changes companies can make to increase their competitiveness, the value of training, ways to involve employees in company change processes, the need for and value of workplace literacy programs, new pay policies, the roles of employers and employees in career development, and starting a human resource department.

- *Business Assistance Notes* – A newsletter series for service providers. Initial newsletters focus on: the needs of small and mid-sized companies, integrated service delivery, cost effective services, implementing learning consortia, marketing to businesses, organizational training needs assessment, training evaluation, and state-level integration policies.

Tools for Companies

- *Product Checklists* – Two checklists – for employee training and workplace literacy products – companies can use to determine whether particular assistance products follow best practice.

- *Interview Guides* – Four guides – for employee training, labor-management relations, work restructuring, and workplace literacy products – companies can use to interview and select appropriate service providers.

- *Pay-for-Knowledge* – A how-to guide on the development and implementation of a pay-for-knowledge system.

- *Computer-Based Training* – A checklist that will enable individuals to ascertain the appropriateness of a CBT package for use with a specific firm, and a contact resource list of computer-based training developers vendors.

83

Tools for Service Providers

- *Integrated Service Delivery* - A publication, based on case studies of "best practice" sites, that provides insights into the best methods for delivering integrated services – services in the areas of employee training, labor-management relations, work restructuring, and workplace literacy – to small and mid-sized companies.
- *Delivering Cost Effective Services to Small and Mid-Sized Companies* - A how-to guide that highlights proven approaches for delivering cost-effective services to small and mid-sized companies.
- *Approaches to Forming a Learning Consortium: A Guide for Service Providers* - A how-to guide on forming learning consortia.
- *Marketing to Businesses* - Information on how to identify and effectively market services to a local business community.
- *Assessing an Organization's Training Needs* - A generic training needs assessment accompanied by instructions on how to approach and "market" the value of training to small and mid-sized business leaders.
- *Assessing the Value of Workforce Training* - An introduction to assessing the value of training programs, focusing on quick and easy strategies.

Internet Services

- *Internet Listserv* - An electronic forum for discussing issues and sharing information on workforce and workplace development issues. To subscribe to NWAC-L, send an e mail message to LISTSERV@PSUVM.PSU.EDU. Leave the subject line blank. The body of the message must contain only the following: subscribe NWAC-L YourFirstName YourLastName.
- *Gopher Server* - Online access to materials and products produced by the Collaborative as well as additional instructional and staff training materials, research, databases, bibliographies, program guides, reports, and articles concerning small and mid-sized businesses and the challenges they face. The Gopher Server address is INFO.PSU.EDU. After you reach the Gopher Server, open "Information Servers at Penn State," then open "Research Centers and Institutes" to find the National Workforce Assistance Collaborative Gopher site.
- *World Wide Web Home Page* - Information on the Collaborative and its products and services, as well as links to related information on the Internet. The Collaborative's world wide web address is http://www.psu.edu/institutes/nwac.

For more information on the Collaborative and its products and services, contact Cathy Stewart at the National Alliance of Business, 1201 New York Avenue NW, Suite 700, Washington, DC 20005, phone 202/289-2915, fax 202/289-1303, e-mail NWAC@NAB.COM.

Products can be downloaded from the Collaborative's gopher server or world wide web home page, or ordered directly from the National Alliance of Business, Distribution, P.O. Box 501, Annapolis Junction, MD 20702, phone 800/787-7788, fax 301/206-9789, e-mail INFO@NAB.COM.

84

National Workforce Assistance Collaborative Partners

NATIONAL ALLIANCE OF BUSINESS
1201 New York Avenue, NW
Suite 700
Washington, DC 20005
Phone: 800/787-2848
Fax: 202/289-2875
E-mail: INFO@NAB.COM

Atlantic Office
317 George Street
New Brunswick, NJ 08901
Phone: 908/524-1110
Fax: 908/524-6275

Capital Area Office
1201 New York Avenue, NW
Suite 700
Washington, DC 20005
Phone: 202/289-2897
Fax: 202/2875

Central Office
9400 N. Central Expressway
Suite 606
Dallas, TX 75231
Phone: 214/373-0854
Fax: 214/373-1941

Midwest Office
1 East Wacker Drive
Suite 2410
Chicago, IL 60601
Phone: 312/595-2100
Fax: 312/595-2101

Northeast Office
1 McKinley Square
Suite 600
Boston, MA 02109
Phone: 617/624-4190
Fax: 617/624-4195

Southeast Office
1 Midtown Plaza
1360 Peachtree Street, NE
Suite 710
Atlanta, GA 30309
Phone: 404/881-0061
Fax: 404/881-0006

Western Office
800 Wilshire Boulevard
Suite 960
Los Angeles, CA 90017
Phone: 213/488-9153
Fax: 213/488-9460

COUNCIL FOR ADULT AND EXPERIENTIAL LEARNING
243 South Wabash Avenue
Suite 800
Chicago, IL 60604
Phone: Phone: 312/922-5909
Fax: 312/922-1769

Philadelphia Office
Delaware Valley Industrial Resource Center
12265 Townsend Road
Suite 500
Philadelphia, PA 19154-1286
Phone: 215/969-1286
Fax: 215/969-6652

INSTITUTE FOR THE STUDY OF ADULT LITERACY
The Pennsylvania State University
College of Education
204 Calder Way
Suite 209
University Park, PA 16801-4756
Phone: 814/863-3777
Fax: 814/863-6108

MARYLAND CENTER FOR QUALITY AND PRODUCTIVITY
CMB/SPA Building
4th Floor
University of Maryland
College Park, MD 20742
Phone: 301/405-7099
Fax: 301/314-9119

NATIONAL LABOR-MANAGEMENT ASSOCIATION
P.O. Box 819
Jamestown, NY 14702-0819
Phone: 800/967-2687
Fax: 716/665-8060

NATIONAL
ALLIANCE OF
BUSINESS

1201 New York Avenue, NW
Suite 700
Washington, DC 20005
800/787-2848

R6064