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ABSTRACT

This packet contains seven short guides for activities that help work force development professionals develop their professionalism and establish ties with their peers. The guides cover the following topics: (1) building local peer networks; (2) meeting with other work force development professionals; (3) planning a roundtable; (4) sponsoring professional development workshops; (5) conducting an occupational focus group; (6) forming a training institute; and (7) forming a chapter of the National Association of Workforce Development Professionals (NAWDP). The guides provide step-by-step processes for developing and implementing the activities. The guide to forming a NAWDP chapter also contains a list of 21 resources available from the organization. (KC)

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NATIONAL ASSOCIATION OF WORKFORCE DEVELOPMENT PROFESSIONALS

GUIDES

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A Guide to

Building Local Peer Networks

The NAWDP's individual membership base makes it ideal for building connections among individual professionals in a local area. Also, its national identity and network structure support local networks.

But peer networks won't happen by themselves. Development and maintenance take work to ensure that networks are available when you need them. Also, you can use the networks in different ways, so you will have to decide which are most important.

Building and Maintaining Networks

The core of the peer network, whatever you do with it, involves some basic mechanics. Make sure you include these steps as your projects develop:

1. **Identify networks:** what are the basic groupings?

2. **Collect information** (a simple survey can serve this purpose): what does each individual know, what is each willing to do (serve as a mentor, etc.), and what information would people like to get from the network?

3. **Set up systems**: format your mailing list, phone list, or directory for ongoing projects.

4. **Assign responsibility** for using networks: is there a central contact? Or are you issuing a directory for self-referral?

5. **Update the list/directory** (twice a year is a reasonable minimum for accuracy).

You may want to have a "network coordinator" who maintains lists, conducts referrals, and generally takes care of the mechanics. As the networks develop, you may wish to have leadership for each – for example, a network chair or coordinator.

But networks are really fairly uncomplicated. You don't need an elaborate structure, just mechanisms and volunteers for information collection and maintenance.

The exact format will depend on what you want to do with the networks. You may want to start with single-event projects in the beginning, such as focus groups or information exchanges at the state conference. At those events, you will be able to identify potential leaders for longer-term projects and measure the enthusiasm for such endeavors.

Uses of Peer Networks

How can local peer networks encourage individual professional development?

- **Tie into the national networks.** NAWDP has organized networks around 7 functional areas:
  —Job development/marketing;
  —Counseling/case management;
  —Training/instruction;
  —Supervision/management;
  —Program development;
  —Fiscal;
  —MIS.

  You may want to develop local groups around these or combinations of these categories, allowing you to tap into the national networks and the resources they develop.

- **Publish directories for self-initiated contact.** Ask individuals to identify the network(s) in which they are most interested, and compile a list with addresses and phone numbers. Once compiled, the list can be updated and distributed on a regular basis. This allows individual professionals to take the lead in contacting their peers for advice and networking.

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- **Set up a mentoring program with more experienced individuals available for career counseling in specific areas.** Develop a list of professionals who will agree to be available for informational interviews, career advice, and other one-on-one assistance to their peers. If they are willing, you can publish the list. If you want to control the demands on these volunteers, you may want to do the referrals through a central contact.

- **Set up a peer exchange for tips and problem-solving.** For more specific questions—practical tips, problemsolving techniques, programmatic information—collect peer exchange information. This means compiling information (your original survey can do it) on types of programs, clients, and specialties with which each individual has experience. Then specific questions can be referred to someone with specific expertise. As with the mentoring program, referrals can be self-initiated using a directory, or more formally conducted through a central contact.

- **Hold information exchanges at conferences and other events.** Even without an ongoing peer exchange, one-time exchanges can be effective. An information sharing session among those in like occupations is easily organized at a conference, a chapter meeting, or as a stand-alone meeting. Developing an advance list of topics or issues to cover will attract an audience and keep the session on target. Make sure the session has a good facilitator and a couple of participants who are willing to kick off the discussion with their own experiences or materials. You may want to use a recorder to get down the good ideas and suggestions for later distribution.

- **Act as advisory groups for NAWDP events, activities and publications.** Peer networks are great planning tools. Because NAWDP serves the entire profession, there is a wide range of specialties and interests among its membership. Even local chapter leadership can't reflect every one of those interests. Use the peer networks to identify needed workshops for conferences, chapter activities, and other professional needs. Both local NAWDP chapters and the national organization will be grateful for this input.

- **Hold focus groups to assist local training institutes, directors' associations, and others to identify issues.** Not only NAWDP, but other groups interested in professional development benefit from peer exchange activities. If your state has a training institute, peer focus groups could help do a needs assessment. An agency directors' association might be interested in suggestions from focus groups as well. And first-line staff roundtables can be valuable complements to the more common forums offered to administrators and directors. For example, consider holding roundtables on coordination with directors ... then with program managers ... then with intake and assessment workers. How would the results of all the groups relate?

- **Build task forces to compile and publish resource lists, best practices, and other useful materials.** A formal network structure may provide leadership for these tasks, but to get maximum peer involvement you might want separate task forces for each specific project. Use focus groups and information exchanges to identify needed resources; requests to the mentoring and peer exchanges might also indicate needs. Over time, your networks can compile a valuable library of lists, references, and tips for peer use.

- **Contribute articles.** Too often, opinion and best-practice articles for the profession come from a very limited segment – usually administrators. Peer groups can be valuable vehicles for collecting resources and opinions. Don't leave the results on the focus group flipchart. Seek out members of the group who are able and willing to write them up into best-practice descriptions, policy recommendations, and viewpoint articles. State and local publications are often looking for such pieces, as is NAWDP's "*Advantage*."

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A Guide to

Meeting with other Workforce Development Professionals

NAWDP reaches across program lines and hierarchies to link individual professionals from all aspects of employment and training. Connections with other organizations can be a central part of building those individual networks as well as achieving your goals.

To work effectively in your community, you will need to work in collaboration and coalition with other groups: professionals from related fields, programs, and interests. Approach and structure your contacts so they will be rewarding for all involved.

Following are some of the considerations in meeting with other workforce development professionals.

Preparing for Collaboration

Think out your goals in working with other groups. They have their own legitimate focus and goals; you are looking for the point where your interests coincide and you can work together.

To pursue a fruitful collaboration, you need to become familiar with the circumstances and goals of the other organization. Ask these questions:

- **What is the current situation facing the potential partner organization?** What do we know about their funding, political climate, philosophical orientation, client or member population, programs and services, challenges and successes?

- **What are their goals and objectives in collaborating with us?**

- **What are the potential problems in meeting these objectives?**

- **How specifically can we work with them to help them get what they want?**

- **What do we hope to gain from this contact?** Think about your own goals, for the immediate meeting and for longer-term purposes. This could range anywhere from simple networking and information gathering to preliminary agreement, drafting a contract, or forming an official tie.

Be clear on the specific outcomes you want from the meeting – you can't get what you don't ask for! Be prepared to be persuasive.

- **What commitment will we ask the group to make?** For example, serve on a task force or committee, provide representatives for an event, co-sponsor training.

- **What objections might the group have to this partnership?**

- **How can we overcome those objections?**

Building on Collaboration

A single meeting may in itself be very valuable, simply by acquainting the two organizations and the individuals present. But think in longer terms as well, both to follow up on agreements made and to build on the new relationship.

- After the first contact, **what is the next step** in pursuing our collaborative effort? Whom to see, when, where, agenda, timetable?

- After the first contact, **what have we learned** about this organization? Who else needs this information?

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- In light of our new connection, **are we aware of other shared goals, possibilities** for joint action, or joint benefits such as information sharing and public relations opportunities?

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A Guide to

Planning a Roundtable

Sponsoring a Roundtable discussion on workforce development issues is one of the most effective ways to bring together professionals from different areas of employment and training for planning, to reach consensus on common directions, or just to air all views. Especially now, when workforce issues are hot and new proposals seem to appear every day, a Roundtable can be an important service to local professionals.

Roundtable Questions

Prepare your facilitator with questions specifically suited to the Roundtable topic and participants. Questions may be sent to participants in advance, but they should not prepare formal remarks or bring documentation. Following are sample questions for a Roundtable on workforce development issues:

1. From your perspective, what are the two or three most important issues related to preparing the future American workforce?

2. What should be the major emphasis in public policy? What should we fund and where should we focus in public programs?

3. How can public programs for workforce development be more effective? How can we win public support for these programs?

4. How should business be involved in these critical issues? What incentives would persuade business to invest in its current and future workforce? What role should business play?

5. Is the current structure the best vehicle for achieving workforce goals? How should the structure change?

6. How can practitioners in workforce development—the professionals in the field—help to meet these challenges and bring about these changes?

7. How would current legislative proposals affect the ability of professionals to design, implement and deliver effective programs?

Facilitation

The Roundtable discussion should be freewheeling and open. It is important not to push for a predetermined conclusion or overstructure the topics. However, the questions and facilitation should push participants to go beyond identification of problems to possible solutions, beyond differences to points of consensus, and beyond general analyses to concrete possibilities.

To accomplish this, you need an experienced facilitator: knowledge of issues is good, but make sure the facilitator has no strong personal agenda to push. The facilitator's role is to keep the discussion focused and moving, but not to dominate or guarantee the outcome.

After the discussion, it is useful to ask a commentator/observer (not facilitator) to sum up before closing. A local journalist is good for this and helps get press coverage.

Structure and Timing

The structure and timing of your Roundtable may depend on the participants and issues involved. One possible structure takes about four hours: Open with introductions and an explanation of the Roundtable purpose. Devote two hours to the main discussion, working through the questions developed in advance. After a break for lunch or coffee, summarize the major issues and ideas that emerged during the discussion. Then the group attempts to reach closure.

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Participants

Set the participant list at 12-14 maximum; more will prevent a full discussion. Make sure to get a good mix of all appropriate segments: education, employment and training, welfare, business, research, public policy.

Taping/Transcribing

Taping and transcribing the roundtable is recommended, to help disseminate results and write up stories and press releases. If possible, videotaping provides an educational tool for other purposes.

Room Setup

Seat participants around one table, round or oblong, or around tables set in a hollow square. The table(s) should not be too long; participants need to be able to see each other.

A small audience can be seated outside the table, along the walls. If you have a large audience, the Roundtable setup should be open to the audience, with tables in a three-sided or crescent shape, so participants can still see and speak directly to each other.

If needed for taping, sufficient microphones should be provided so participants don't have to pass them back and forth.

Coffee and water should be provided. If possible, a lunch break at the end of the discussion gives the commentator a chance to collect remarks before the windup.

Background materials may be appropriate, although anything lengthy should be sent out in advance. In addition, don't forget to put NAWDP brochures and publications in the packet provided to each participant.

Followup

If taped, the full transcript should be sent to all participants, to NAWDP and other interested parties. If not, a summary of major points should be prepared. A press release listing the participants and describing major issues discussed should be sent to local press.

You may find that the group wants to continue meeting. This could be the basis for a regular workgroup on coordination, policy planning, or other issues.

Specialized Roundtables

You may want to organize an industry-specific Roundtable, on workforce development issues for an industry that dominates in your local labor market or that is going through major changes. If so, one useful format is to split the Roundtable discussion. The first (shorter) part revolves around overall employment and training trends: new technologies, training policy and practice. The second homes in on trends specific to the industry. This allows members from the industry to see their concerns in a broader context, and makes the connection between the industry and the expertise of employment and training professionals.

Another type of specialized Roundtable would consider the impact of a specific policy change, such as proposals for local labor market boards or "one-stop" skill centers. Your background materials and questions would be focused accordingly.

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A Guide to

Sponsoring Professional Development Workshops

NAWDP's primary mission is professional development of employment and training staff. This guide is intended to assist NAWDP members interested in providing professional development services for their peers on the local level, in the form of workshops for information and skill development.

The need for such services varies, depending on existing state and local efforts at professional development and capacity building. Typically, though, professional development and consistent training opportunities are limited or unavailable for direct service staff in local areas. Focusing on the needs of direct service practitioners can complement rather than compete with existing systems. Through a chapter or just a local member workgroup, you can help encourage relevant, affordable, and accessible on-site training workshops for direct service professionals in employment and training, across resource systems and organizations.

Benefits

Professional development workshops offer important benefits to workshop participants:

- relevant training and information on important topics
- opportunities to network and affiliate with peers across organizations
- learning about topic-specific resources
- a better sense of career opportunities and career development

Benefits for the sponsoring members, chapter, or district include:

- the opportunity to recruit interested individuals NAWDP and local activities
- chances to publicize goals and events
- if desired, a source of revenue for other activities or future training

Controlling Costs

There is risk involved in sponsoring workshops. However, the risks can be controlled and turned into profit. This has been the experience of existing NAWDP chapters who have sponsored training.

Remember that everything is negotiable! Trainers trying to expand their clientele or markets are often willing to share risks. Free meeting locations can be found, or hotels often will waive room fees when meals are provided. Other cost considerations:

- A cancellation policy that encourages substitutions without returning tuition money helps to ensure attendance.
- Calculating overhead costs (trainer, site, lunch and refreshments, publicity) helps to set individual participant costs. Low overhead costs allow low tuition fees, which in turn encourage attendance.
- One-day workshops also keep down costs (per diem, meals, loss of productivity) to organizations who pay for individuals to attend workshops.

But the real keys to successful and cost-effective training are choosing relevant topics, selecting trainers, and arranging for convenient and low-cost locations. Let's look at these in more detail.

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Choosing Relevant Training Topics

The easiest approach to sponsoring relevant workshop topics is to ask individual practitioners what their training needs are and design training responding to those stated needs. This can be accomplished by conducting a survey, examining survey results from other states and localities, or polling representative peers from various programs and organizations.

Designing, conducting, and tabulating survey instruments need not be prohibitively expensive or difficult if cooperation from state or regional agencies is obtained. In fact, early cooperation from various human resource systems can help to ensure success.

A sample survey is attached. However, a survey is not necessary to get started if you anticipate the day-to-day client issues that direct service practitioners experience. Topics such as client motivation, problem-solving, screening and referral for drug and alcohol problems, detecting depression and mental health issues, working with hostile clients, and case management techniques, among others, are cited by practitioners as training priorities. By choosing topics common to staff across organizations and programs, you can generate interest and enthusiasm for training which can produce opportunities for further exploration of training needs.

Selecting Trainers

A successful workshop is dependent upon planning and selecting an appropriate trainer. Three areas should be emphasized when seeking a trainer.

The first is expertise in the topic area. Appropriate trainers can be identified by inquiring from other organizations who have used trainers. It can be beneficial to find trainers who have experience in the workforce development profession, but is not necessary for every topic. Private and public organizations should be sought out to suggest trainers. Good resources include higher education, consultants, and professionals from topic-specific organizations.

Second, insist that the trainer customize the presentation to job training practitioners' experience, practice, and setting. This may require up-front time to educate the potential trainer. Specific outcomes should be developed, and the workshop evaluated against the stated outcomes.

Finally, the trainer should model adult participatory learning principles, encourage peer exchanges, and create an enjoyable learning environment. References and followup evaluations will help you judge these abilities.

Training Site

A convenient and centrally-located site is essential. A free training facility might be arranged with a job training organization, community college, public entity, or private business. If not, negotiate with hotels for the best bargain.

If possible, refreshments and lunch should be available at the training site for comfort, to save time, and to encourage networking. A simple lunch can usually be catered in at modest cost, and built into the attendance fee.

Scheduling events around a weekend can be a draw. Parking, acoustics, comfort, desired training space and materials, and aides should be weighed when choosing a site.

Publicity

Announcing the workshop well in advance (preferably six weeks) is important, as is a wide distribution network. Expensive announcements are not necessary if you have a built-in constituency; a simple flyer will communicate as well.

Co-sponsoring training with another group, such as NAWDP, can add to a distribution network. Announcements can be made in the NAWDP newsletter, and you can get mailing labels for NAWDP members in your area.

Other distributors of announcements? Send multiple copies to job training directors, state associations and other associations, Job Service and human services staff.

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An announcement can be as simple as a flyer with a return coupon, outlining the pertinent information:

- workshop title
- goal
- target audience (for example, job developers, trainers, counselors)
- outcomes and benefits
- prices
- place, date and time
- how to enroll, substitute or cancel

A sample announcement is attached.

Feedback

Solicit written and verbal feedback, and ask participants for future training topics. Feedback can encourage you to continue, help you to plan, and convince others of the merits of your efforts.

Questions? For more information or advice in planning professional development workshops, contact NAWDP.

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A Guide to

Conducting an Occupational Focus Group

The following guide is designed to assist those who wish to hold an occupational focus group, for the purposes of developing training or standards for professional development.

The guide is based on the experiences of NAWDP's professional development workgroup. Beginning in 1992, the members of the workgroup identified occupational/functional areas for workforce development professionals, and began to hold focus groups in those areas, as the basis for developing a curriculum of professional staff training. (Information on the workgroup and its current activities is available on request from NAWDP.)

The process outlined in this guide includes some elements of the DACUM (Developing A CUrriculuM) approach. However, a validated DACUM process requires DACUM-trained facilitators and other criteria that are not attempted here.

GOALS

The purpose of an occupational focus group is to identify skills or competencies and information bases required for proficiency in the occupation. The group process can be used for professional development planning, including:

- curriculum development;
- training planning, selection, and evaluation;
- performance evaluation; and
- test or resource materials design.

This process uses experienced individuals working in the occupational area to describe the tasks, skills and knowledge required for successful performance. (This does not eliminate, of course, the need for expert training and adequate resources to help workers develop those skills and improve their performance.)

REQUIREMENTS

The focus group process brings together 10-12 individuals working in the same occupational area. Preparatory materials are not necessary. However, a skilled facilitator is important for helping the group reach consensus and refine its statements. A comfortable meeting room with a table and flipcharts is needed.

The basic group process takes at least one full day, but a two-day session can arrive at more detailed and refined lists. A sample schedule for a two-day session is attached.

After the lists and definitions are developed, the same group or another processes them into the desired products – for example, curricula, workshop outlines or training requests.

GROUP SELECTION

Selection of group participants is critical to ensure a productive session. Group members should be identified as experienced and effective practitioners in the area being analyzed, and able to work with a group for a team product. In addition, they should be representative of the full range of situations in which practitioners to be trained will work: for example, large and small organizations, rural and urban settings.

In some cases, job title may be sufficient to identify the occupational cluster you need for a focus group. In many cases, though, job titles are inconsistent across organizations, or organizational size and staffing patterns may affect job responsibilities for a given title. NAWDP's professional development workgroup chose to describe functions instead of titles. This allows for competency identification while recognizing that a given title or position might include various combinations of the functional responsibilities.

The workgroup members ensured representativeness (and also appropriate political support) by soliciting nominations from the local employers of the professionals to be analyzed: for example, each job training agency in a state was asked to nominate a participant. If the number is too large for an effective group (12 maximum), more than one group can be held and the results melded.

The employer must be willing to ensure the participant's availability for the full one- or two-day session. Depending on your resources, that may mean employer coverage of travel expenses for the participant.

PROCESS

Working together, the group moves through the following steps:

1. **Orientation**: facilitator explains the group process and goals. Roles of facilitator and participants are clarified, and the agenda and guidelines explained.
2. **Job description**: group defines or develops a job description for the occupational area. The facilitator guides the group to identify which job titles are included in the function (this helps resolve differences among widely diverse organizations), and to develop a working definition.
3. **Job responsibilities**: group identifies general duties, areas of responsibiity. This is a brainstorming exercise, with results taped on the wall for further consideration.
4. **Tasks**: group identifies specific tasks performed. For each duty area, the group identifies specific tasks that are included. Lists are recorded and posted beside the general duty. Consensus can usually be achieved by working with the statement, "The worker can reasonably be expected to ... "
5. **Review**: facilitator leads group in review and refinement of task statements. This is the time to work for more clarity and precision.
6. **Order**: facilitator works with group to sequence task statements. Participants organize the tasks within each duty area into a logical sequence.
7. **Skills**: group identifies skills, knowledge, and abilities related to tasks. Participants brainstorm lists. At this point, they may also list related attitudes, as well as tools and equipment.
8. **Other options**: as appropriate. For example, some groups have categorized skill statements as "knowledge," "skill," or "ability"; some categorized each skill as a basic job requirement, appropriate for on-the-job training, or an option for other training; some identified basic tools and resources needed.

The outcome is a succession of skill statements usable for producing learning objectives, curricula, and other professional training materials. A sample outcome report from one focus group is attached.

13

FOLLOW-UP

It is important to give participants the results of their group effort, in the form of proceedings as well as updates on the use that is being made of their work. As training and resources are developed based on their work, it may be useful to have the group review them and offer feedback.

OCCUPATIONAL FOCUS GROUP SAMPLE SCHEDULE

DAY ONE

10:30-11:00 am
Welcome and introductions

11:00-11:15 am
Orientation to workgroup goals and responsibilities

11:15-Noon
Definition of employment and training counselor

Noon-1:00 pm Lunch

1:00-2:30 pm
Identification of job duties

2:30-2:45 pm Break

2:45-4:30 pm
Identification of tasks

DAY TWO

9:00-9:15 am
Review of Day One

9:15-10:30 am
Identification of tasks (continued)

10:30-10:45 am Break

10:45-Noon
Further clarification of tasks: knowledge, skill, abilities

Noon-1:00 pm Lunch

1:00-3:00 pm
Staff development issues

SAMPLE OUTCOME REPORT: OCCUPATIONAL FOCUS GROUP, JOB DEVELOPMENT

Definition: The job developer contacts and establishes relationships with local employers for the purpose of marketing the agency's clients and services, consistent with the goals and objectives of the agency. S/he identifies job prospects and matches clients to appropriate openings. After client placement, the job developer follows up with the employer and/ or client.

A. CONTACT AND RECRUIT EMPLOYERS

1. Develop a list of local employers using resources such as newspapers, Chamber of Commerce lists, state agencies, employer directories, and previous employers.
2. Target area according to employer information, participant needs and qualifications, economic conditions.
3. Make contact with employers by telephone or letter.
4. Schedule appointments to explain programs to potential employers.
5. Qualify employers based on employment needs and client skills.
6. Conduct direct mailings to potential employers in target areas.
7. Maintain employer information files.
8. Follow up initial contacts with potential employers.
9. Provide pre-screening employment services.
10. Participate in community organizations with employers as members.

B. DEVELOP LEADS

1. Meet with employers to determine hiring needs: skills of new workers, quantity and quality of new programs.
2. Provide overview of JTPA, JOBS, and related programs.
3. Obtain comprehensive job opening information from employer.
4. Distribute copies of job order information to everyone who works with clients.
5. Match client and job lead.
6. Call employer to determine whether job has been filled.
7. Call employer to verify placement information.
8. Customize job description.
9. Process paperwork.
10. Call employer to determine whether opening was filled satisfactorily.
11. Maintain job opening information.
12. Thank employer.

C. MARKET PROGRAMS AND SERVICES

1. Make presentations to organizations, employers, participants.
2. Develop and distribute targeted brochures, news articles, videos, releases and other promotional materials.
3. Answer requests for information.
4. Develop marketing displays.
5. Participate in layoff/rapid response presentations.
6. Select awardees and arrange awards banquets.
7. Participate in job fairs and trade shows.

D. USE LABOR MARKET INFORMATION

1. Track employment and unemployment trends and forecasts.
2. Determine area demographics.
3. Identify companies opening, closing, or expanding in the area.
4. Provide labor market information to participants.
5. Use labor market information to identify employer and job targets.

E. MANAGE CLIENT CASELOAD

1. Assess client skills, needs, barriers, work history, attitudes.
2. Counsel clients regarding employment plans.
3. Refer clients to training, apprenticeship, basic education, or other services.
4. Oversee job search.
5. Assist client with goalsettingand problem-solving.
6. Review resumes, applications, and cover letters.
7. Complete placement forms.
8. Refer client for corrective action.

KNOWLEDGE AND SKILLS

Organizational skills
Computer literacy
Communication skills (oral and written)
Understanding of specific programs (JTPA, etc.)
Knowledge of business community
Time management
Assessment
Career counseling
Listening
Appropriate referrals
Budgeting
Office practices (general)
Sales and marketing
Human relations
Public speaking skills
Mediation skills

TRAITS AND ATTITUDES

Creative
Able to work with a variety of people
Receptive to change
Flexible
Empathy for participants
Patient
Perceptive
Personable
Able to accept criticism
Honest
Credible
Diplomatic
Professional
Approachable
Sense of humor

TOOLS AND EQUIPMENT

Car
Telephone
Clerical support
Calculator
Copier
Maps
Dictionary of Occupational Titles
Resource materials: AV and books
Employer directories
Rolodex
FAX

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A Guide to

Forming a Training Institute

This guide is adapted from an issues paper prepared for the Job Training Division of the Georgia Department of Labor by Nancy Bross, Consultant, Public Policy Support

If your job training system is concerned about making the most of its limited resources for training and technical assistance, and ensuring that the right people and scope of training are involved, you may wish to explore the feasibility and desirability of establishing a training institute.

Training institutes exist in a variety of forms in many states. These organizations address the training and professional development needs of administrative staff, service providers, and volunteers who work to provide services funded under the Job Training Partnership Act (JTPA), welfare-to-work funding, and other similar programs. Each institute has developed its own, unique approach to meeting the needs of the people it serves.

You may wish to begin discussion in your state or region through an institute formation workgroup. This paper presents the issues which that group can discuss at its initial meeting. It is organized around four broad topics: assessing the current system, institute activities, structure, and next steps.

Assessing the Current System

A variety of organizations and individuals have some stake in the training and professional development of administrative staff, service providers, and volunteers at all levels of your job training system. These stakeholders may include those staff and volunteers themselves; the organizations which employ them; the entities which exercise oversight over those organizations; the associations which serve those individuals, organizations, and oversight bodies; and the trainees and employers served by your job training system. Stakeholder concern about whether your system is making the most of its limited resources for training and professional development may lead to an interest in assessing the adequacy of the current system and exploring the feasibility and desirability of establishing a training institute.

You will need to consider the availability and use of current resources, including funds earmarked for capacity building for the job training system, and training and professional development activities such as workshops and conferences. In addition to the state and national funds available and funds from local agencies, consider services offered by the interest groups and professional organizations that support the employment and training field. Besides NAWDP, they include the National Association of Private Industry Councils, the National Association of Counties, the U.S. Conference of Mayors, and others.

The following questions will help you in assessing the current system:

- **Who has a stake** in the training and professional development of the staff and volunteers who make up your job training system?
- **How satisfied are these stakeholders** with the current training and professional development strategy?
- From the perspective of these stakeholders, **what are the specific strengths and weaknesses** of the current strategy, in terms of content, coverage, and cost effectiveness?

Institute Activities

Conversations with staff at training institutes in other states and review of materials provided by them reveal substantial diversity in their activities and structure. Even since that information was collected, new institutes have begun and changes been made in existing ones, we offer some examples which your state or region may wish to consider in thinking about how to meet its own training and professional development needs.

All of the training institutes serve three groups: front-line staff, administrative staff, and PIC members. All also provide services to service provider staff, as well as to staff employed by administrative agencies. However, they differ in the nature of their relationships to the individuals and organizations which receive their services and the emphasis they place on service to members of each group.

They also differ in the content and structure of their training. Most provide training in specific job skill areas, such as job development or counseling, to front line staff. Several offer or are working on certification programs for some job functions. NAWDP is facilitating exchange and collaboration among states interested in the issue of credentialing.

A more typical approach to provision of training, though, is to offer one- or two-day workshops to a variety of audiences, based on their expressed needs and interests. The topics offered may include some which change over time and others, such as orientations to JTPA, which are offered on a regular basis. The number of workshops offered over the course of a year varies widely.

Training may be provided by institute staff, affiliated instructors, or outside trainers and consultants. Most institutes contract out at least some of their training offerings. The regularity with which a course or workshop is offered helps determine the type of trainer used. For example, the structured curriculum of Oklahoma's certification program is taught by the institute staff, but outside trainers are brought in for other workshops.

Although traditional classroom training appears to be the norm, institutes also use other options, including video instruction and self-study guides and tests.

Although all institutes provide training, there is considerable diversity in the other services they provide. These services tend to reflect their interest in meeting the specific needs of their stakeholders. Some institutes plan and make arrangements for annual conferences, facilitate workgroups and focus groups, and offer "info-share" sessions among practitioners.

Institutes are generally concerned with supporting exchange of information and other resources. Most institutes publish newsletters and calendars, and some publish directories. The Missouri Training Institute maintains a data base of employment and training professionals willing to assist others in identified areas of expertise and a lending library of professional development related books and materials. Maryland's institute operates a "training clearinghouse," sharing notices of commercially available training and attempting to negotiate price reductions for those who register through them when there is sufficient interest. A couple of association-based institutes provide services related to tracking legislative action.

In addition, computer-based services are growing. Michigan Works! employs a systems analyst who supports MIS Users Group meetings, acts as a liaison between SDAs and the state MIS staff, develops custom programs, and provides training and technical support. New York's institute is experimenting with an interagency computer bulletin board to help state agencies coordinate their training activities.

To determine appropriate activities, ask the following questions:

- **Are there training needs not being met which could be addressed through a training institute?** Are there training needs which could be addressed more effectively or efficiently through an institute?
- **What other services and resources** do employment and training professionals and volunteers need for their continued development? Would an institute be a good vehicle for providing those services and resources?
- **What direction should training and professional development for your job training system take in the future?** For example, should you become involved in development of credentialed training for specific functions? Could forma-

tion of an institute help the system meet its longer-term training and professional development goals?

- If your state or region establishes an institute, **what should the mission of that institute be?** How should that mission be reflected in the immediate and longer term goals and priorities of the institute?

Structure, Funding, and Oversight

Underlying the issues of structure, funding, and oversight is the question of who "owns" an institute. While ownership can be shared between the state and local agencies, and can even be shared among agencies in different programs, who has authority over the institute and the degree of collaboration between the state and local levels vary from institute to institute. In addition, there is variation in the roles of board volunteers and local elected officials. These variations are reflected in structure, funding, and oversight.

Building an institute into an existing professional association gives association members ownership of the institute. In this case, the state may participate in institute activities but is not involved in governance of the association. If your SDA association or other association were to assume responsibility for operation of a training institute, the structure and bylaws would have to undergo substantial revision. While professional staff would provide the association with continuing support for its current activities, expanded responsibilities would place new demands on association officers and necessitate the creation of new oversight mechanisms.

Several training institutes are funded through contracts with the state. Under this arrangement, the state is a client of the university, the institute staff are university employees responsible for meeting the needs of its client, and agencies are recipients of services. Local agencies and practitioners have no authority over these institutes. However, they may have advisory boards or other mechanisms for gathering input.

An institute may operate fee-for-service, as OMTI in Ohio does, or be organized as a subsidiary of another organization.

Contracting with an existing organization is probably the easiest way to get an institute off the ground. There is no need to establish a legal entity, develop bylaws, and create the policies and structure necessary to support a staff. On the other hand, balancing the multiplicity of interests involved can be difficult.

In addition to personnel and overhead costs, institutes which bring in large numbers of outside trainers also have substantial budgets for that purpose. Although some workshops are more costly to put on than others, the Maryland institute estimates the cost of providing training at $60 to $90 a day, per participant. All of the institutes offer training at less than its true cost, but most charge a small fee to cover lunch and materials. Even institutes which do not charge a fee charge a penalty for cancellation on less than three days' notice and for "no shows."

To make decisions about structure and funding, consider the following questions:

- Institutes may be created through contracts with educational institutions, developed as part of the activities of a professional association, or established as free-standing non-profit organizations. What advantages and disadvantages do alternative organizational structures offer your job training system?

- What are the appropriate state and local roles in the formation, funding, and governance of an institute? How might alternative organizational structures support these roles, and the balance between them? What should the role of the state association(s) be in institute formation and oversight?

- Within the state and local levels, what are the appropriate roles of administrative agencies, councils, and elected officials with regard to the formation and governance of an institute? How might alternative organizational structures support these roles, and the balance between them?

- What are the key leadership and oversight functions associated with operation of a training institute? If your state/

region were to establish an institute, how should specific oversight functions be addressed?

- If your state/region were to establish an institute, what kind of staff would it need initially? What kind of funding would the institute need in order to carry out its mission, consistent with immediate goals and priorities? What would the institute's longer-term funding needs be?

- What resources could be used to support formation of an institute? What resources could be used to support an institute on a continuing basis?

Next Steps

The workgroup's preliminary findings and recommendations should be circulated to staff directors and board chairs for their review and comment, and discussed at professional meetings. Then, the workgroup can meet again to review the comments received and make final recommendations.

At that time, the following questions will help you move forward:

- **Does it appear to be desirable** to establish a training institute? If so, why? If not, why not?

- **Does it appear feasible** to establish a training institute? If so, what conditions are essential to feasibility? If not, what, if anything, could be done to make institute formation feasible?

- If the workgroup believes that establishment of a training institute is desirable and at least potentially feasible, **what are its preliminary recommendations regarding the mission, activities, structure, funding, and oversight of that institute?**

- The preliminary findings and recommendations of the workgroup will be circulated and discussed. **Should any other strategies for seeking input be used?** What steps should be taken to ensure that opportunities for dialogue and comment are as useful as possible?

- **What additional information** would members of the workgroup like to have available to them before they make their final recommendations regarding institute formation?

NAWDP maintains a list of training institutes and other staff development initiatives. For a copy (or to provide information for that list), contact:

National Association of Workforce Development Professionals
1620 I Street, NW, Ste. 30
Washington, DC 20006
202/887-6120

19

A Guide to

Forming a NAWDP Chapter

Why form a NAWDP Chapter?

Local chapters build the personal contact, loyalty, and leadership that are difficult to achieve in a national organization with a single office.

Local chapters generate ideas, enthusiasm, and energy that keep the entire association vital and relevant.

Local chapters provide the opportunities to share information and experiences that lead to improved capabilities and better programs.

Local chapters bring NAWDP home to individual professionals ... even if they never have the chance to attend the annual meeting or serve on the national Board. They offer avenues for personal growth, policy influence, program design, and professional exchange that can touch the lives of every NAWDP member.

Getting Started

The first step in forming a NAWDP chapter is not drafting bylaws, or electing officers, or choosing a name. Those are the mechanics, not the heart, of a chapter.

The first and critical step in forming a NAWDP chapter is deciding on its mission – what you want the chapter to do for professionals in your area.

A NAWDP chapter can focus its activities in many ways, depending on the local circumstances and needs. Existing chapters have chosen a range of roles, including:

- providing professional development training
- creating a staff training institute
- facilitating peer networks in areas of expertise
- conducting needs assessment surveys
- working with other organizations to exchange views and identify staff needs
- sponsoring and organizing conferences
- sponsoring public forums and roundtables on workforce development issues

The current resources and needs in your local area will be different than others. The chapter needs to fill a special niche, not duplicate other organizations.

How can you identify your special mission?

Before you proceed with the mechanics of forming a chapter, you should decide whether you have enough sense of purpose to go on. A meeting to determine a mission statement could lay the groundwork and help with future planning.

1. **Start with the mission of NAWDP:** to serve as the national voice of the profession and to meet the professional development needs of its members. What would that mission mean on the local level?

2 **Identify what already exists in your area.** If you have a training institute or other active training effort, then the chapter may not be needed as a training sponsor. But peer networks and focus groups might be a valuable complement to training efforts.

3. **Conduct a needs assessment.** A simple survey will identify what professionals in your area think they need; think about how you can help fill those gaps.

4. **Talk with other organizations.** Do you have a local directors' association? A training institute? What roles do they fill? What is missing? How would they be willing to work with a chapter?

5. **Think about the resources of NAWDP.** How could the chapter tie into national networks, materials and resources? How would a national tie help support local activities?

Building Momentum

You know what you want a chapter to do ... you have a sense of purpose. How can you turn it into a working organization?

1. Assemble a nucleus of persons interested in forming a chapter. We recommend that you find a minimum of 10 persons who are willing to work to get a group started. However well things go, the initial impetus will come from a small core of people willing and able to donate the time and energy.

If you need help finding other interested persons, call the national office for a list of NAWDP members in your area. You need 50 members to form a chapter, so you may have to do some recruiting.

2. Arrange a time and place for a planning session. It is best to have a small organizing meeting first. Use a room at someone's home or office, or meet in a restaurant for dinner. You may want to have a small social period before or after the meeting. Use your judgment about what will work best for those you know are coming.

The meeting organizers should draw up an agenda so everyone knows what will be discussed and accomplished at this meeting.

A larger event can be planned for the second meeting. Plan a program to attract staff at all levels in the employment and training field. Be careful how you advertise your event; though some people will be happy to help you get started, others will want to wait until the group is actually organized before participating.

3. Ask some questions and make some decisions. These first meetings are the time to determine the feasibility of forming a chapter. You will have to ask some basic questions. If you can't get good answers, the discussion can lay the groundwork for a decision at a future meeting. We suggest going through all the questions before the discussion, so everyone will know where you are headed.

Start with discussion of the mission and purpose of a chapter. Following are other questions to work through:

Is there enough interest in the idea of meeting regularly among professionals and policymakers in the proposed chapter area? Why should they meet? Is the momentum likely to be sustained, or will the group fall apart if some of the original organizers leave?

Are there shared concerns among the members and potential members in your area?

What would you hope to accomplish? What would be the purpose and goals of the group?

What community would the group serve? (You may want to pick a name based on the geographical area.)

As much as we would like to see a chapter organized in your area, past experience shows that if there is no clear focus and most of the work falls on a few people, problems arise in a short time. Leaders burn out, leaving them tired with no feeling of accomplishment. Others don't know why the group exists and will not participate, and may even become disillusioned with NAWDP as a whole.

Therefore, if you can't find positive answers to the above, we suggest that you reexamine the need for a chapter. It might be better to wait. Or it might take more effort to develop a genuine and lasting interest in forming a chapter.

Usually there is a great deal of interest in forming a chapter, but asking these questions at the beginning provides a solid foundation for an active and productive chapter.

Building Chapter Structure

Once you have consensus and direction, you can work with your group to complete the requirements for an official chapter. The process is really quite simple, but everyone should be aware of the requirements to avoid later complications.

Formal recognition as a chapter of NAWDP requires:

1. A petition from a minimum of 50 active members of NAWDP. Members must be drawn from a clearly defined geographic area.

2. A formal agreement (or approved bylaws) outlining financial and other details.

Chapter and National Membership

Membership in NAWDP is open to all practitioners and policymakers in employment and training and related human resource development programs. Regular membership in a chapter is open to all individuals who are members of NAWDP. **Only members of NAWDP may be members of an official NAWDP chapter.**

Chapters are established through a formal affiliation agreement between NAWDP and a group of 50 or more of its members residing or working in a state, multistate region, unit of general local government, or a combination thereof.

Chapter Size

Chapters must have at least 50 active members of NAWDP. Chapters seem to be most active when they have a membership of 70 or more members. This usually provides enough people to take responsibility for chapter activities without suffering burnout.

Chapter Dues and Money Management

Local dues—over and above national dues—may be set by the chapter. Chapters are not required to charge local dues, and most chapters choose not to do so, raising funds for chapter activities by other means. (If you do not charge chapter dues, all current NAWDP members in the chapter's area are automatically chapter members.) Chapter income need not be limited to dues, and we encourage you to develop other resources.

If local dues are charged, the amount should be based on the probable ability of local members to pay and guided by an estimate of the budget for the coming year.

NAWDP must be notified of the chapter dues information. Chapter dues are then added to the national dues and collected by the national office at the regular expiration dates of June 30 and December 31. All chapter dues are promptly forwarded in full to the chapter's treasury.

Usually, a treasurer is elected to handle funds. The chapter will need to establish a bank account for the management of funds received. The account should be in the name of the chapter, not a person. You may wish to require two signatures for checks. Any funds from the national office will be made out to the chapter, as should be other payments, such as training fees.

The chapter executive board should review the chapter's financial situation regularly.

If the chapter takes in money, you will have responsibilities for tax status and filing obligations. Chapters are eligible for nonprofit tax status under NAWDP's group exemption; however, they are responsible for their own employer ID number and tax returns. Ask NAWDP for more information.

Bylaws

The purpose of chapter bylaws is to have a written guide to the purpose and operation of your chapter. Your bylaws should provide procedures for operating the chapter and for solving problems. Do not produce too rigid or too vague a document, or you will run into problems later.

Your executive board composition may differ from the Association's and other duties may be added or deleted. You should build a structure to suit your needs, but it may not be in violation of national bylaws (for example, you may not add a new category of membership).

When you have drafted your bylaws, send a copy to NAWDP for approval or correction.

The chapter will be formally recognized by NAWDP's Board upon receipt of an organizing petition from 50 current NAWDP members, and approval of bylaws. However, chapters may begin official operation while awaiting such approval.

Chapter Recordkeeping

An officer—usually the elected secretary—is responsible for chapter records. In addition to membership records, official communications from the national office, tax returns, chapter annual reports, and other official records should be kept in a known place and made available for review by subsequent officers.

Taking Positions on Issues

Chapters are not to take official NAWDP positions on issues or join other organizations without permission of the national organization. We encourage the active interest of chapters in local and national issues of concern to the employment and training field, and are glad to consider any matter raised by local chapters. Individual members are free to express opinions and take positions as long as they do not speak on behalf of NAWDP.

Chapter Activities

Following are some suggestions for forming and operating your chapter. No one chapter needs to do all these activities ... or any of them. Your knowledge of your own local area and your colleagues is the best guide. But these ideas may help you make your own plans.

Chapter Meetings

The most common chapter activity is the regular meeting. It may be monthly, bimonthly, quarterly, or whatever is most appropriate for your group. We recommend monthly or bimonthly, to keep up momentum and involvement.

The format for meetings may vary. You may present a program, such as a guest speaker or panel. Needs assessments or surveys will help you determine member interests. You may want to have a social honor schedule a meal before the program.

Meeting places should be convenient and accessible. You may want to meet regularly at the same place, same time, to help members remember the meetings. Or you may vary meeting places and times to accommodate individual schedules.

Meeting content, in addition to a speaker or other program, may include chapter business and announcements.

Meetings may be open or closed to non-members. However, opening all or part of the meeting is advisable, to encourage potential members to try out chapter activities.

Networking and Outreach

Are there related associations in your area? Let them know you exist, and try planning joint events with them. This lets you sponsor larger and more attractive events, and allows both groups to pursue their missions more effectively.

Your chapter should foster and maintain good relations with the community. Offer the resources of your chapter in the form of a speaker's bureau, mentoring program, or other activity to give you a community presence. Be sure that chapter meetings and events are well-publicized.

Chapter Newsletter

Most chapters choose to publish and distribute a chapter newsletter on some regular basis. This can be as simple as a one-page photocopied flyer or more sophisticated. The important point is to find a vehicle to keep members and potential members in touch with what the chapter is doing.

The newsletter can contain chapter news, professional tips, announcements, and other resources for local professionals.

Chapter Programs and Projects

To attract members and fulfill its mission, your chapter will want to have some specific projects. These might include:

- **Sponsoring workshops** for the professional development of employment and training staff
- **Organizing a conference** or assisting in your state/regional conference

- **Developing a peer exchange** and/or mentoring system, where professionals can seek advice and counseling from their colleagues

- **Developing a training institute** for your state or area

- **Conducting focus groups** to identify professional needs

- **Compiling and publishing resource lists** and bibliographies on specific topic areas

- **Conducting information exchanges** in which members discuss specific professional needs or issues and exchange ideas on how they approach them

- **Developing peer networks** similar to NAWDP's national networks, in which professionals in similar occupations can exchange more specific advice and information

Set up your project for success. Make sure you have clear task leaders and assignments, deadlines, and resources; charge chapter leaders with following up on volunteers to make sure they are keeping up with the work; solicit the advice of members about what they need and how successful the project is.

Don't take on too much at once. Too many projects start with a bang and then dwindle into nothing because members get busy! Start small and allow projects to grow as more people get involved.

Member Recruitment and Promotion

Membership and mission are intertwined: a large and active membership base allows the chapter to accomplish more, and effective chapter activities will attract and keep members. Recruitment and retention take energy, but they have a big payoff for the vitality of the organization.

Identifying Potential Members

All professionals and policy-makers in the training and employment field are potential members of NAWDP. This includes:

All levels of staff—intake and assessment specialists, counselors, program managers, directors, and others

Members of workforce development boards and other voluntary boards and committees

Staff in local, state, federal, regional agencies

Staff in the wide array of training and employment programs, including welfare-to-work, adult and youth job training, vocational education, and literacy

24

Addressing Potential Member Needs

Attracting potential members to the chapter means asking not, "How can potential members fit into our group?" but "How can the group meet the needs of potential members?" In light of NAWDP's mission and your chapter's goals, ask the following questions to analyze your membership potential:

What do NAWDP and our chapter offer that is not available elsewhere?

What are our strengths and weaknesses? (Think about image, current membership, resources, focus)

What other organizations are competing for our potential members' commitment, time and money?

Which of the groups from the list of potential member groups should we concentrate on?

What strategies and activities can we develop to meet the needs of these groups?

Recruiting a Diverse Membership

Take special care to include all potential segments of the training and employment community in your analysis. A chapter diverse in membership will provide different viewpoints, backgrounds, and strengths, enhancing your chapter's growth and survival.

To recruit diverse members, your chapter's leadership must look at the particular needs and interests of each member and be sensitive to them. Hold meetings in buildings and at times accessible to most members. Choose programs that address their range of interests.

Visibility

For effective recruitment, make sure the chapter activities are visible to the community of prospective members. Schedule meeting times to meet the needs of the widest audience; place posters, announcement and brochures in all the agencies that employ training and employment staff, including Job Service, PIC, human services, education, United Way agencies, and community-based organizations.

Place meeting announcements in local newspapers; encourage executive directors to announce the chapter meetings to their staffs and to promote membership. Distribute your chapter newsletter to non-members, and make sure it carries notices of meetings and membership invitations.

Sample recruitment and retention materials are available from NAWDP.

SAMPLE FORMATION LETTER TO NAWDP MEMBERS

Dear {name}:

Something new is happening here in {state or area}, and you can be a part of it.

A new chapter of National Association of Workforce Development Professionals is forming. We invite you to join us at the organizing meeting on {date}, at {time}, at {place}.

This will be an opportunity for you and all of us in workforce development to underscore our professionalism, develop solidarity and expand our access to information exchange, personal contacts and networking.

To form a chapter, we must have at least 50 NAWDP members petition the national organization. Once our chapter is approved, we will be entitled to a chapter representative on NAWDP Board of Directors.

We will be making many important decisions at this meeting. Please attend. If you have questions, please call me at {telephone}.

Sincerely,

{signature}

P.S. If you can't make the meeting, please indicate below whether you are interested in this effort:

____ Yes, I am interested in helping organize a Chapter of NAWDP.

_____ No, I am not interested.

SAMPLE FORMATION LETTER TO NON-MEMBERS

Dear {name}:

Something new is happening here in {state or area}, and you can be a part of it.

A new chapter of the National Association of Workforce Development Professionals is forming. NAWDP is our national professional association, working to speak out for the profession and to serve the professional needs of those in employment and training.

As a professional association, NAWDP offers members a wide array of benefits for information exchange and professional development, including a monthly newsletter, membership directories, a Job Bank, peer networks, and annual conference and more. Membership information is enclosed. We encourage you to join us in this professional endeavor, and to join us at the organizing meeting on {date}, at {time}, at {place}.

A local chapter will be an opportunity for you and all of us in employment and training to underscore our professionalism, develop solidarity and expand our access to information exchange, personal contacts and networking.

To form a chapter, we must have at least 50 NAWDP members petition the national organization. Once our chapter is approved, we will be entitled to a chapter representative on NAWDP Board of Directors.

We will be making many important decisions at this meeting. We hope you will attend, and will want to join NAWDP and participate. If you have questions, please call me at {telephone}.

Sincerely,

P.S. If you can't make the meeting, please indicate below whether you are interested in this effort:

_____ Yes, I am interested in helping organize a local NAWDP chapter

_____ Yes, I would join NAWDP and a local chapter

_____ I'm not sure whether I would participate

_____ No, I am not interested

Writing Your Chapter Bylaws

Chapters of the National Association of Workforce Development Professionals are required to develop and write their own bylaws stating the fundamental principles governing the organization and its operation.

This might seem a daunting task, but is really fairly uncomplicated. You don't have to create a document from scratch. NAWDP has national bylaws, and your chapter's purpose and mission will be similar to the national ones. However, the method of operation for your chapter may be different from NAWDP's and even from other chapters.

Use the national bylaws and the outline for chapter bylaws as guides to create your own. Your bylaws will serve as an operations manual for officers and members. A good document will provide answers to most questions about the group's purposes and method of operation in concise, simple language. At the same time, it will cover only the essential details, allowing the chapter to remain flexible to respond to member needs without cumbersome procedures.

When your bylaws are completed, they should be reviewed by the national office for consistency with national policy. After review, the bylaws can be distributed to members in final form.

AN OUTLINE FOR CHAPTER BYLAWS

Document Heading: Provide the full name of your chapter. You may, of course, choose to incorporate "National Association of Workforce Development Professonals" in your name.

Name and Affiliation: Required. Give the chapter name and indicate that it "shall be a chapter of National Association of Workforce Development Professionals, hereinafter referred to as NAWDP."

Purpose: Required. The purpose of the chapter must be similar to NAWP's in order to meet legal requirements. NAWDP's purpose in its articles of incorporation is:

The Corporation is an association of individual practitioners in human resource development programs. NAWDP works to improve the effectiveness of the nation's training and employment programs, and to enhance public-private cooperation. NAWDP fosters professionalism through personal career development.

Membership: Regular membership must be open to anyone in your geographical area who belongs to the national organization, and no one can be a chapter member without being a NAWDP member. Beyond this, you may set membership requirements appropriate for your area, including local chapter dues as well as national dues. (Ask NAWDP about dues collection procedures.)

27

Authority: Required. Your bylaws must indicate that the chapter will abide by the bylaws of NAWDP. They must also state who has the power to establish the rules and regulations and to amend the chapter bylaws. This may be all of your voting members, a board of officers, or some other entity as you deem appropriate.

Amendments: Required. Your bylaws must outline the process by which amendments to the bylaws can be made. It is suggested that you address how amendments may be submitted for consideration and what the process is for ratifying the amendment. Obviously, this should be consistent with the "Authority" section.

Executive Board/Duties of Officers: Required. If you choose to elect officers, this is the section where you identify the duties and responsibilities of individual officers and the powers of the Executive Board as a whole. There are no requirements of offices to be created.

Be sure you identify the term of the offices. Also set a quorum of the Executive Board for action to be taken. At minimum this should be a clear majority.

Committees: Required. Your chapter is not required to create specific committees, but your bylaws must state the procedure by which committees will be created if needed. You can identify standing committees in this section, but remember that any committees mentioned in the bylaws cannot be dissolved without an amendment to the bylaws.

Nominations and Elections: Required. Specify the procedure for securing nominations and holding elections.

Dues and Membership: Required. That is, required if you are mandating chapter dues. At any rate, the section should indicate what constitutes a "member in good standing." We suggest that you do not put the amount of the dues in the bylaws, since an amendment will be required to change it.

Meetings: Required. Some mention must be made of meetings, but it is up to the chapter how frequently the membership and the Executive Board shall meet.

Chapter Newsletter: This is optional and need not be specified in the bylaws, but a newsletter is an excellent membership benefit to offer.

Annual Report: Required. The chapter must submit an annual report to the chapter membership and the Executive Board of NAWDP. The report must summarize activities and financial status.

Responsibilities to NAWDP: Required. The following language must be in the chapter bylaws:

As a chapter of NAWDP {chapter name} must provide the National Headquarters with the following information:

a. The Chapter's current address and the name and telephone number of the primary contact person. NAWDP must be notified when there is any change in this information.

b. A list of the Chapter officers and National Board representative(s) within thirty days of their election, including addresses and phone numbers. ________ must notify NAWDP of any changes in those offices, or their addresses or phone numbers.

c. A copy of the {name} annual report each year.

Affiliation with Other Organizations: This is not required but it sets chapter policy for joining or affiliating with other groups. Keep in mind that chapters may not join other organizations without the approval of NAWDP.

Dissolution of the Chapter: Required. Any remaining assets must be given to another non-profit group in the event of the dissolution of a chapter. ASSETS MAY NOT BE DISTRIBUTED AMONG THE MEMBERSHIP, AS THIS IS IN VIOLATION OF THE LAW. The assets may be donated to NAWDP or to another non-profit group in your chapter's area.

Procedure for Meetings: Required. An orderly method of procedure is necessary for conducting business. Some suggested standard language:

The Chapter shall abide by Robert's Rules of Order, Newly Revised, in conducting its business meetings in all matters not specifically addressed by the bylaws of the Chapter.

***

NAWDP can help support a chapter by providing member lists and labels, NAWDP applications and other publications. Give the NAWDP a call for more information.

You may also want to contact other chapters for copies of their bylaws to consider in developing your own.

National Association of Workforce Development Professionals
1620 I Street, NW, Ste. 30
Washington, DC 20006
202/887-6120

CHAPTER AND BOARD RESOURCES

Chapters and Board members may obtain the following resources from NAWDP free of charge. Use this sheet as a mail order form, FAX to 202-887-8216, or call 202/887-6120.

Name ____________________ Chapter ____________________

Address ____________________ Phone ____________________

____________________ When Needed ____________________

APPLICATION MATERIALS (please specify number needed):

_____ Membership brochures with application form
_____ Docu-Serve order form
_____ Marketing Opportunities price list (for suppliers, advertisers)

SAMPLE RESOURCES (for display and distribution at meetings—specify number needed)

_____ Sample issues of *NAWDP Advantage*
_____ Curriculum endorsement packets
_____ Local services kit

OR separate pieces from local services kit:

_____NAWDP and Career Development
_____Building Local Peer Networks
_____Meeting with Other Workforce Development Professionals
_____Planning a Roundtable
_____ Sponsoring Professional Development Workshops
_____Forming a Training Institute
_____Forming a NAWDP Chapter
_____Sample Recruitment Materials

MERCHANDISE (for raffle/drawing: one of each per year, more for sale if desired)

_____NAWDP totebag (blue or black)
_____NAWDP lapel pin
_____Certificate for 1 year's membership

LISTS AND LABELS

_____ List of current chapter/district members (free on request)
_____ List of expired memberships (free on request)
_____ Current member labels (free on request twice per year)
_____ Expired member labels (free on request twice per year)

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REPRODUCTION RELEASE

(Specific Document)

I. DOCUMENT IDENTIFICATION:

Title: Building Local Peer Networks	
Author(s): NAWDP	
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