

Orange County Workforce Development Board

Strategic Plan

July 1, 2022 to June 30, 2025



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I. Introduction

The Orange County Workforce Development Board's (OCWDB) Strategic Plan will support the board in fulfilling its roles and responsibilities under the Workforce Innovation and Opportunity Act (WIOA). Key features of and information concerning the plan include the following:

- A. Development:** The OCWDB's Chair, supported by its Executive Director, convened the board's members along with key staff for a full day planning session on March 23, 2022. Members were informed in advance of the meeting that it was would used to gather input on the development of a strategic plan for the board. Staff attending the planning session served as advisors to WDB members. An outside facilitator was engaged to support discussion among board members on key topics. The facilitator later used WDB input to craft the written plan.
- B. Scope:** The plan is in effect for a three-year period: July 1, 2022 through June 30, 2025.
- C. Focus:** The plan's primary areas of focus are: statements of the OCWDB's mission, vision, and core values; a summary of WDB priorities, particularly as they relate to service delivery; local accountability standards outside the WIOA performance measures; goals for the workforce system and the local board; and strategic initiatives to be led by the WDB. It should be noted that the OCWDB's Strategic Plan supplements, but does not supplant, WIOA-required local and regional plans that have been approved by the California Workforce Development Board.
- D. Implementation:** Following adoption of the plan by a vote of the OCWDB, the plan will be implemented by the board, with the support of County staff, on July 1, 2022.
- E. Proprietorship:** The plan reflect the ideas and stated priorities of the members of the OCWDB. As such, the strategic plan is that of the board, acting in service to the workforce development programs administered by Orange County.

During the initial planning session that resulted in the strategies and goals described herein, the workforce development board members resolved to remain “**opportunity ready.**” This seems an apt motto to support the board's efforts as it initiates and executes its strategic plan.

II. Purpose of the Strategic Plan

The plan has been developed to express the OCWDB's priorities and the principles the board most values. It is also intended to:

- A. Communicate defining principles and core values of the Workforce Development Board:** The plan captures for the first time since the implementation of WIOA, OCWDB's mission, vision, and core values. By incorporated these principles into the plan, the board is communicating them to entire workforce development stakeholder community in Orange County and beyond.
- B. Outline priorities for service delivery:** The WDB members who led the development of the plan's content, clearly outlined priorities for the Orange County workforce development delivery system, which the board oversees.
- C. Express key local accountability standards:** OCWDB seeks to establish standards for the local workforce system that look beyond the participant level achievements to countywide economic and community impact.
- D. Establish broad goals for the workforce system and for the local board:** The plan contains a series of goals established during the initial planning process. The board expects that these goals will both expand and be further refined during the life of the plan.
- E. Embrace strategic initiatives:** To bring its priorities and goals to fruition, the OCWDB has begun to identify strategic initiatives. These initiatives too are expected to expand over the course of the plan.

III. Review and Revision of the Plan

During the three-year period covered by the plan, the OCWDB intends to formally review the plan no less than annually and expects that, as events and circumstances dictate, the board may review the plan more frequently. As one of the core functions of the plan is to capture and communicate the strategic direction of the WDB with respect to programs, services, and approaches to address workforce development needs in Orange County, it may be necessary to frequently reassess, reevaluate, and revise goals and other elements of the plan. Factors which may affect the plan, requiring review and revision, include, but are not limited to:

Changing economy and labor market: The pandemic and the fluctuating nature of reopening and recovery have served as frequent reminders of the volatility and susceptibility to changing conditions that exist within the local economy. The workforce system must be prepared to alter its course in response to these changes.

Emerging local and regional priorities: In addition to economic shifts, other changes within the county and surrounding areas can impact the workforce system. Changes in demographics are one such factor. Increases in homelessness and housing insecurity, transfer of individuals in the custody of the state corrections agency to local authorities, immigration patterns, and other factor affecting communities across Orange County have signaled the need for significant services and approaches of the workforce system.

New or amended federal legislation: WIOA has reached the time where reauthorization is required. A new bill is likely to bring requirements that will need to be embedded into the workforce development service delivery structure in Orange County.

State mandates: Priorities of the California Legislature, the California Labor and Workforce Development Agency, the California Workforce Development Board, and the state Employment Development Department, along with actions by other state agencies, can quickly and often significantly alter the course of workforce operations. The local workforce system must remain ready to adapt programs and services to these mandates and changing priorities.

Industry trends and needs of local businesses: Business needs change with advancements in technology, supply chain issues, and changing market demands. The workforce system must adjust its operations in tandem with the changes experienced by business.

Modify, update, refine, or revise system goals: The goals expressed in the plan are broad. Over the three-year life of the plan, it is inevitable that the WDB will modify one or more of these goals to identify specific actions necessary to achieve objectives that emerge as priorities for the workforce system and the board.

Other priorities identified by the Workforce Development Board: In addition to all of the various external drivers of change, the local board itself may recognize the need for

change based on conditions internal to the local workforce system and on trends suggested by the data it produces.

IV. Using the Plan to Fulfill the Board's Responsibilities

In addition to communicating priorities, goals, and initiatives of the OCWDB, the plan is a useful resource to the board and County leadership and staff in addressing the following requirements for local workforce development areas and WDBs.

- A. WIOA Four-Year Local Plan Development:** Every four years. WIOA requires that Governor-designated local boards develop and submit to the state for approval a four-year local plan. Such plans are focused on service delivery, partnerships, the functions of one-stop operator, and local area administration.
- B. WIOA Four-Year Regional Plan Development:** With the passage of WIOA, for the first time, Governors were instructed to assess the benefits of designating regions consisting of one or more local workforce areas to address regional economic and workforce conditions. California ultimately designated 15 regions, including one covering the three local workforce areas situated within the geographic boundaries of Orange County. The local area administered by the County functions as the grant recipient and lead for the region. As with local plans, a regional plan focused on economic conditions, sector strategies, and target populations must be submitted to and approved by the state every four years.
- C. Local Area Subsequent Designation:** The County of Orange was designated as a local service delivery area in 1983, concurrent with the implementation of the federal Job Training Partnership Act. Under subsequent federal legislation, including the Workforce Investment Act and WIOA, the County has re-designated multiple times as a local area. Every two years, the County must submit an application to the state for subsequent designation.
- D. Local Board Recertification:** WIOA prescribes specific criteria for certification of local workforce development boards, including composition of the board and representation of members. Applications for board recertification are required every two years.
- E. AJCC Certification:** WIOA provides basic criteria for certifying that America's Job Centers of California (AJCCs) provide necessary services and maintain required partnerships. Certification reviews must be conducted every three years. A summary of certification reviews for each center, along with a corresponding continuous improvement plan, must be submitted to state.
- F. Service Provider Selection for the WIOA Adult, Dislocated Worker and Youth Programs:** The principles reflected in the OCWIB's mission, vision, and core values should be used to guide processes to solicit and select workforce system service providers. Priorities, goals, and initiatives included within this plan may also help to inform the content of solicitations.

- G. Determination to Pursue State, Federal and Specialized Grants:** The County, along with the WDB, often become aware of discretionary and specialized grant opportunities from federal and state agencies, and, occasionally, from other sources. Principles expressed within this plan can aid the County and the board in determining if grant opportunities align well with local workforce system priorities and whether programs to be implemented by specialized grant funding would fit with the WDB's mission.

- H. Developing and Expanding Local and Regional Initiatives:** This plan concludes with a concise list of strategic initiatives to be pursued by the OCWDB. Elements of the plan may assist the board in developing and/or expanding specialized initiatives.

V. Mission and Vision

Vision and mission statements serve as focal points for board members, staff, and others to identify themselves with an organization's activities, services, and processes and to give these stakeholders a sense of direction.

- A. Mission:** A well-crafted mission statement defines the business, products, services, and/or customers of an organization, thereby defining its primary objective. The mission statement may also provide detailed information about what the organization does, how it does this, and who it does it for. Unlike a vision statement, described below, it is focused on the present and near-term.

The OCWDB's mission is:

To lead a workforce system that provides education, resources, and collaborative opportunities to benefit job seekers, employers, and entrepreneurs and to support the economic prosperity and competitiveness of Orange County.

For the local board, this mission shall serve as a guide for establishing priorities, setting goals, and determining how to best develop, deploy, and assess the utilization of resources throughout Orange County's workforce development delivery system.

- B. Vision:** A board's vision statement typically focuses on idealistic goals and aspirations, which describe how the future would look if the organization were to completely and fully achieve its mission. Visions are timeless. Even if an organization changes its strategies and approaches, the vision will often remain the same. An inspirational, credible, and attractive vision statement promotes commitment and energizes those who it affects. In addition, a well-thought out vision statement bridges the present with the future while establishing a standard for excellence – a "north star". It may also communicate the purpose of the organization to board members, leaders, staff, and other stakeholders and motivate them to achieve that purpose.

The Orange County Workforce Development Board has adopted the following vision:

An Orange County committed to empowering human potential, in which all individuals are able to achieve their career aspirations, which, in turn, support and align with the goals of businesses across key industry sectors.

This vision serves as a touchstone for the board and represents an aspiration for all whom the workforce system touches and affects.

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The values, priorities, standards, goals, and initiatives described within this plan simultaneously reflect and support the mission and vision of the Orange County Workforce Development Board.

VI. The Board's Core Values

An organization's core values are principles or standards of behavior that represent an organization's highest priorities, deeply held beliefs, and fundamental driving forces. They're at the heart of what organizations and employees stand for from an ethical perspective.

Core values are guiding principles that form a solid foundation of what organizations are, what they believe, and what they want to be going forward.

OCWDB has identified the following as the core values of the board in guiding and overseeing the local workforce development system:



A. Innovation: The introduction of new things or ideas.

For the WDB, innovation within the local workforce development delivery system is critical to the capacity of the system to keep pace with the expectations of businesses and job seekers within Orange County's rapidly changing economy.

B. Empathy: The action of understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experience of another without having the feelings, thoughts, and experience fully communicated in an objectively explicit manner, along with the capacity for the foregoing.

For those leading the workforce system, understanding the barriers, vulnerabilities, and characteristics of those served by the system is essential to decision-making and oversight that result in the availability of the right mix of services and support.

- C. Equity:** Justice according to natural law or right. Most often, it specifically refers to freedom from bias or favoritism.

More than ever, the local board strives to ensure that equity and access are hallmarks of the Orange County workforce system.

- D. Excellence:** The quality of being outstanding or extremely good.

The board's commitment to excellence should be manifested across the full range of programs, services, and activities conducted through the system, which should produce strong results and outcomes, along with high customer satisfaction ratings.

- E. Responsiveness:** The quality of acting quickly and positively.

The ability of the local system to respond effectively and appropriately to the needs of job seekers and businesses is at the heart of the WDB's commitment to workforce system customers, our service delivery partners, and other system stakeholders.

These core values shape the board's overall decision-making and inform system priorities, goals, and key initiatives represented throughout this plan.

VII. Priorities in Serving Key Customers

Drawing focus from its mission, vision, and core values, the OCWDB has established priorities for serving both job seekers and businesses. At the present, these priorities include:

- A. Focus on vulnerable and underserved communities:** Many individuals who are most in need of workforce development services and are likely to receive the greatest benefits from participation are those from communities that have been historically underserved by the public workforce system. The WDB, County leadership and staff, service providers, and system partners should focus outreach efforts on these individuals and communities.
- B. Leveraging opportunities for job seekers to “earn and learn:”** Training strategies that include a work-based learning component during which job seekers participate in paid work offer multiple benefits. These include learning through hand-on experience, becoming proficient in the precise skills required by businesses, and being able to afford to participate in training, as a source of income is incorporated into the program design.
- C. Build pipelines of skilled, job ready workers for local businesses, particularly those in high-growth and high-demand sectors of the regional economy:** The WDB sees part of its overall responsibilities as ensuring that there are adequate numbers of County residents being prepared to meet the current and future workforce needs of healthcare, information technology, manufacturing, hospitality, and other leading industries in Orange County.
- D. Be the “go to” source for businesses in preparing and sourcing job ready candidates:** The marketplace is full of competition with regard to services that assist companies with hiring and candidates in their job search. The public workforce system occupies a unique place in this market, backed by federal resources and informed by a long history of serving businesses and job seekers in Orange County. Within this competitive environment, it is incumbent on the board and county leadership to devise and implement strategies that promote the system’s strengths and its expertise in sourcing talent for business.
- E. Support job seekers’ development of entrepreneurial skills:** The strength, vitality, and diversity of Orange County’s economy is due, in no small part, to the tenacity of entrepreneurs who have and continue to take risks to launch new businesses in the region. Successful start-ups can quickly find themselves in need of workers that can be identified by the workforce system. In addition to supporting entrepreneurs and small businesses in meeting their talent needs, the WDB recognizes the importance of having strong entrepreneurial skills training available for workers in any field. Individuals with these skills are often highly motivated and are more effective leaders than those who lack these skills. The board will make a

concerted effort to increase the availability of entrepreneurial skills training for job seekers participating in local workforce system services.

- F. Remain “Opportunity Ready:”** To be successful, the Orange County workforce system must remain flexible, agile, and able to respond quickly and effectively to changing needs of industry and the workforce. The board has deemed this level of preparedness as being “opportunity ready.”

The board will periodically review these priorities and make adjustments based on service data and other factors. such as changes in the local economy and/or the workforce.

VIII. Local Accountability Standards

Section 116 of WIOA establishes performance accountability indicators and performance reporting requirements to assess the effectiveness of states and local areas in achieving positive outcomes for individuals served by the workforce development system's core programs. Largely, these indicators measure skill acquisition, credential attainment, employment, and wages following completion of program services. Participant-related measures have been supplemented with three options for determining performance in serving business customers.

While Orange County's workforce system is designed to achieve and track success against the WIOA measures, OCWDB is committed to furthering the effectiveness of the system through the implementation of accountability standards focused, broadly, on the entire system. Selected standards include:

- A. Appropriateness of services provided to the customers who receive them:** WIOA prescribes services that are allowable under the Adult, Dislocated Worker, and Youth programs of Title I. These services, however, are not intended to be delivered in a "one-size fits all" fashion. Accountability standards to be implemented by the board will seek to quantify and measure whether services delivered to individual job seekers and businesses reflect their unique needs and circumstances.
- B. Customer engagement:** The various means and techniques by which organizations interact with their customers constitute their customer engagement strategies. The WDB seeks to measure the extent to which engagement strategies contribute to desired results for job seekers and business customers.
- C. Customer experience** is customers' holistic perception of their experience with a business, organization or brand. In the case of the Orange County workforce system, it is the result of every interaction a customer has with the system from navigating the website to talking to staff and receiving services. The WDB intends to implement processes to capture information on customer experience resulting from contact with the system.
- D. Outcomes (vs. outputs):** Changes and improvements achieved, rather than simply "attainments" (the output). The workforce system's outcomes are, in effect, the difference made by the outputs. The WDB is interested in determining what qualitative and quantitative differences result when businesses hire WIOA participants, job seekers earn credentials, and participants remain employed a year after they complete participation in County workforce services.
- E. Return on investment:** In their management of oversight roles for the workforce system, the County and the WDB are stewards of millions of dollars in public workforce funding. In this capacity, they seek to ensure that funds are utilized to

achieve the greatest possible returns in terms of attainments experienced by job seekers and businesses and overall impact on communities and the economy.

- F. Service quality** is a measure of how an organization delivers its services compared to the expectations of its customers. Utilizing evaluation standards, such as those associated with the American Customer Satisfaction Index, the board can identify how and the extent to which Orange County's workforce system is meeting or exceeding the expectations of those it serves.

IX. Critical System Goals

Given the policy-making and oversight roles assigned to the WDB by WIOA, the board has chosen to pursue the following critical goals over its three-year planning period.

- A. Strategically engage the business community:** Many factors, including the increased use of online resources to support hiring have contributed to a slow but steady distancing of the workforce development system from one of its key customers groups: businesses. To be more effective in preparing Orange County residents for jobs in growth sectors and other promising areas of the economy, the WDB and the workforce system must develop and implement strategies to engage the business community as both a partner in designing and developing programs and services to prepare workers for jobs and as a customer, which is seeking talent to make their companies competitive and successful.
- B. Implement and sustain industry partnerships:** Related to the preceding goal, the WDB should continue in its work to engage businesses in priority sectors in sector partnerships, which represent a proven approach to securing input from companies about the skills needed by workers and their present and future hiring needs. Such intelligence from businesses provides workforce and education agencies the requisite information needed to develop and/or modify services and programs that will prepare worker for in-demand jobs.
- C. Improve the usability of data reports:** Redesign and simplify data summaries used by County staff, the WDB, and system stakeholders so that they are simpler, more concise, and easier to understand. Data reports should not only be easier to review, but should present key data in ways that facilitates its use in making decisions affecting services, service delivery, and service providers.
- D. Build and/or strengthen alliances with other systems:** While the Orange County workforce system regularly interacts with other systems and organizations, developing stronger alliances across the various disciplines constituting the workforce development ecosystem in Orange County would enable each system to operate more effectively and achieve better results and outcomes.
- E. Update system technology:** As technology is rapidly changing, it is crucial that the WDB and County leaders ensure that technology available to staff and customers of the workforce system is keeping pace with updates and revisions. The state of the system's technology should be reviewed and assessed annually to determine where updates are needed.
- F. Expand the availability of on-line services:** While the effects of COVID-19 rapidly propelled the migration of workforce services to online platforms, many services available on the web are not equivalent in content and quality to their physical counterparts. As the board and County staff contemplate moving and

permanently offering services online, significant efforts must be made to ensure that online services are not a lesser substitute for those available in-person.

- G. Assess the overall effectiveness of the workforce development service delivery strategies in Orange County:** Given its responsibilities for oversight of the workforce system, the WDB will periodically assess the effectiveness of the overall workforce development system to ensure that it fulfills requirements set forth in WIOA, but represents priorities established by the WDB.

As is the case with much of the content of the plan, the WDB expects that the foregoing goals will be further defined and expanded upon over the course of the planning period. Furthermore, it is likely that additional goals will be added to address system needs and service delivery improvement strategies.

X. Goals for the Workforce Development Board

While the board has emphasized system-related goals in its initial strategic planning work, it also recognizes the importance of building the capacity of the OCWDB to lead the local workforce system. As a result, the following board-focused goals have been established.

- A. Address gaps in board membership:** The WDB’s first obligation with regard to membership is to ensure that a business majority has been achieved and that other statutorily mandated “seats” (e.g. labor, economic development, core partner programs) are filled. Still, beyond these requirements, the board can be most effective when membership reflects a wide range of interests, experience, and expertise. The interests of both business and workers are better served by a more diverse board.
- B. Improve engagement of OCWDB members:** County and WDB leadership should work together on developing and implementing strategies to more fully engage all individuals appointed to the workforce development board to ensure their more active and regular participation in OCWDB meetings and activities. This may include a survey of members to determine approaches to the board’s work that would drive greater participation.
- C. Develop strategies through which OCWDB members become ambassadors for the County’s workforce development system:** WIOA and best practices across that nation’s many state and local workforce systems suggest that, beyond its policy-making and oversight roles, WDBs are most effective when members function as ambassadors for the workforce system. In this capacity, board members meet and otherwise interact with business leaders, community groups, system partners, and others to promote the system’s services, along with its priorities, goals and initiatives.

The preceding goals reflect input from board members that was secured during the initial planning process. WDB leadership and members expect that goals for the board will expand over the three-year span of the plan.

XI. Strategic Initiatives

Initial planning by the OCWDB included identification of select initiatives that draw upon core principles of the board's mission, vision, and priorities, along with its overarching goals for the local workforce system and the board itself. These initiatives currently include the following:

- A. Develop and implement strategies to increase bidder participation in processes to procure providers of services for the Orange County workforce development system:** WIOA requires that the board periodically initiate an open and competitive procurement of service providers for programs funded under Title I of the Act. Historically, such processes have resulted in the receipt of few proposals, particularly when compared with adjacent workforce areas, such as those in Los Angeles County. The board acknowledges that increased participation by eligible bidders in procurement processes has the potential to bring new ideas, strategies, processes, and results to the Orange County workforce system. The board will seek support from the County to identify resources to develop strategies that have high potential for increasing participation from a wide range of eligible organizations.
- B. Develop and expand career pathways that support key industries in the County:** The board seeks to support critical skills needed by the leading industries within the county. The most effective means of ensuring that workers acquire the skills needed for in-demand, high-paying jobs offering opportunities for career advancement is to invest in the development of career pathways. WDB members and county staff that support the board can function as a catalyst in the development and expansion of career pathways by convening key stakeholders, including, but not limited to, leaders from industry and education to identify areas of greatest needs and, subsequently, develop or revise programs and program content that addresses these needs.
- C. Host an Orange County workforce conference:** The state of the workforce development system in Orange County is strong and the system is improving its capacity to address workforce priorities of businesses and residents alike. As such, the time is right for the workforce development board, County leaders and staff, and key partners to organize a conference that would bring together stakeholders from across the workforce system, along with those from allied systems, including education and economic development. The conference would provide a venue for both sharing best practices and for joint strategizing across systems and organizations to plan how the systems will meet future workforce needs in the region.

As the OCWDB implements its three-year plan, it is anticipated that the board will expand the strategic initiatives that it will develop and support in furtherance of its goals for the workforce system.

XII. Acknowledgements

The content of the plan reflects the dedication, commitment, and ingenuity of the leadership and members of the Orange County Workforce Development Board, executive leadership of Orange County Community Services' Community Investment Division (CID), CID managers and staff, and others engaged in the process to shape 2022 to 2025 goals for the local workforce system and the board. The WDB wishes to acknowledge the contributions of the following individuals and the organizations that they represent.

| Orange County Workforce Development Board Members | Orange County Community Services Community Investment Division |
|---|---|
| <i>Chair:</i> | <i>Executive Director:</i> |
| Terri Hollingsworth | Carma Lacy |
| <i>Members Leading the Planning Effort:</i> | <i>Managers and Staff</i> |
| Name, affiliation | Adriana Ott, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| Name, affiliation | Name, position |
| <i>Other Member Supporting Implementation of the Plan:</i> | <i>Regional Organizer</i> |
| Name, affiliation | Annette Kelly-Whittle |
| Name, affiliation | <i>Planning Facilitator</i> |
| Name, affiliation | David Shinder |
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| Name, affiliation | |