Final Report:
South Carolina Talent Pipeline Project

Submitted to:
State of South Carolina
Department of Employment and Workforce

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Executive Summary

South Carolina has begun implementing sector strategies. Sector strategies — regional, industry-focused approaches to building skilled workforces — are one of the most effective ways to align public and private resources to address the talent needs of employers. They move from the focus of one job/one job seeker to the transformative model of building regional talent pipeline, addressing skill gaps, and creating meaningful career pathways for a range of workers. This transformative framework for workforce development service delivery is designed to meet the short and longer-term needs of both employers and job seekers on a systematic basis.

The State of South Carolina – the Department of Employment and Workforce in particular – engaged Maher & Maher to assist in this effort. In its 30th year of operation, Maher & Maher is a specialized change management and talent development consulting firm that delivers tailored solutions to public sector organizations and commercial clientele. Maher is based in New Jersey and also has offices in Washington, DC. It has been our role and privilege to provide subject matter expertise and to facilitate South Carolinians though the process described here.

As a result of this project, a strong foundation has been set at the state level and, most importantly, at the regional level, for the development and implementation of sector strategies and their connection to Career Pathways. There is much left to be done, as may be expected when such a massive change from what has been essentially an assortment of mostly siloed workforce programs, to a broad-based, demand driven and industry sector-focused talent development system that intimately involves additional agencies and most important, engages employers in a far different way, with different objectives. The change called for is not simply one of procedure, process, programs or even services, but rather a change in perspective and culture.

This report represents the work done to provide the foundational aspects for sector strategy development throughout the state; that is, for changing the perspective and culture throughout the system. It seeks to explain the South Carolina context as the project began; the project’s objectives, organization and process; its accomplishments at the state and regional levels; and, most significantly, recommendations for sustaining the momentum engendered through this project so that employers, workers and students throughout the state may enjoy the greatest possible benefits.

“Completing this project does not represent the end of sector strategy development in South Carolina, but rather the end of the beginning.”

~ Rick Maher, CEO
Maher & Maher
The remainder of this report is organized as follows:

II. Project Context and Rationale – A very brief primer on sector strategies and career pathways.

III. Project Objectives, Process and Accomplishments – What was sought and how it was accomplished at the state and regional levels.

IV. The Regions in Detail – Discussions of progress made in each of the state’s four regions in creating regional sector planning teams and building the foundation and plans for delivering on the promise of sector strategies and career pathways. Includes our recommendations for each region to pursue in moving forward.

V. Statewide Recommendations – Steps the state should take to continue its support of regional sector strategy development.
I. Context and Rationale

Sector strategies represent a comprehensive, broad-based approach to identifying and addressing skill needs across key industries within a region rather than focusing on the workforce needs of individual employers on a case-by-case, “transactional” basis. These strategies require workforce and other regional service providers to establish fully engaged, sustainable relationships with each other and with employers to determine the specific skill and occupational requirements to meet industry needs.

The entire objective of the sector strategy is to align all partners, including economic development, workforce, education and employers, around the notion and process of creating talent pipelines for specific critical growing industries. As such, sector strategies may become the vehicle for many other initiatives currently burgeoning or percolating within the state. The application of Career Pathways – done in intimate partnership with sector strategy partners and processes – completes the “marriage”, and results in meeting both employers’ and career-seekers’ employment needs, both short and longer-term, as illustrated below:

The result of productive industry partnerships is creation of an ongoing talent pipeline that meets employer needs and creates family-sustaining careers that can be undertaken by the State’s citizens. The partnerships are ever-changing and the key occupations ever-shifting; and these are reflected in career pathway adjustments, as appropriate – which drives curriculum changes – based on data and ongoing industry needs as expressed through the partnership. The concept as applied to South Carolina is illustrated graphically, below:
In summary, the overarching goals of the sector strategy approach are to:

- Support the expansion of diverse regional partnerships to advance talent pipeline development for critical industry sectors
- Support further development of integrated career pathways
- Identify and align resources to support collaborative strategies
- Align business and job seeker service delivery strategies to the “talent supply chain” vision
II. Project Objectives, Process and Accomplishments

A. INTRODUCTION

The three foundational pillars of sector strategy development, and therefore of creating talent pipelines, are: nascent

- Cross-agency partnerships;
- Regionalism, and;
- Data-driven decision making and service planning.

South Carolina’s workforce system had budding aspects of all three pillars going into the project, and so there were clearly facets of each to build upon.

There were certainly instances of cross-agency collaboration at both the state and regional levels, but such collaboration was spotty, inconsistent and certainly not focused on sustained employer engagement around developing talent pipelines for particular industries. For example, at the state level, four departments agreed to a regional structure (see map), which provided a huge advantage to the planning process. At the local level, it was necessary to surface and recognize examples of collaboration as potential relationships to leverage in the more systematic manner envisioned in this project.

Prior to establishing this project, DEW had completed an extensive data analysis to identify statistically valid functional regional economies and labor/job markets within the state. About two months prior to the project getting underway, the four key state departments – S.C. Department of Employment and Workforce, S.C. Department of Commerce, S.C. Department of Education, and the S.C. Technical College System – involved in talent development agreed to the array of four specific regions, as was indicated by the data, for planning purposes. While some resistance to this “regionalizing” (and other) changes was to be expected, and there is further to go before totally integrated cross-agency, multi-workforce area teams are fully functioning, local personnel quickly organized into regional planning teams and began to explore the myriad of activities that had been taking place, many very productive and long-lasting, virtually “next-door” to them. This exploration, formalized as an “asset identification” exercise, was a major step in moving forward with planning on a regional basis.
Some areas of the state, most notably the region around Charleston, had been using labor market and economic data/information productively for distinct purposes. The strategic use of data in the sector development context goes beyond simply identifying regional focus industries. It also was extremely helpful in closely related ways that are best understood in the context of the transformation sought in South Carolina:

- The data-based aspect of identifying the four regions in the state constituted a compelling argument to local officials and staff. This approach to identifying planning regions assisted greatly in the state’s shift to a regionally-based, rather than strictly local workforce area, approach to sector strategies;
- Forming and utilizing a statewide interagency data team created a model for regional planning teams to see how interagency cooperation could work, and is also spurring the creation of interagency data teams at the regional level, which advance both regionalism AND cross-agency collaboration; and
- In terms of service delivery planning, the key element in making sector strategies “real” for employers and career seekers is the “marrying” of career pathways to sectors. Gap analyses and other data constructs are critical for making this connection.

B. SOUTH CAROLINA PROJECT OBJECTIVES

When managing change in the public or private sector, realization of the level of cultural shift embedded in the transformation, as is called for here, takes time, careful planning and intense preparation. When working across public and private sectors, these processes become even more critical.

Some individuals have asked why, at the regional level, only public sector partners were directly involved throughout the current project. Our experience has repeatedly shown that public agencies and educational institutions need to collectively organize their approach before engaging employers directly. This was especially the case in South Carolina because of the following factors:

- While it is critical that employers end up leading sector partnerships, public partners must be united in their approach and message, and be fully supportive of the framework and plan for developing these partnerships. Engaging employers prematurely leads to the perception that “sectors” is just another program added to the menu of often disconnected services already available, as opposed to a focused, collaborative data-based effort to develop a sustainable talent pipeline in each of the focus industries and a whole new method of delivering services to employers and jobseekers.
- The level of interagency collaboration needed to properly develop sector partnerships with employers was extensive at the outset.
The fact that multiple agencies were working in brand new economic regions meant that the public partners needed to identify regional assets, opportunities and other key factors before being able to move on to employer engagement.

Therefore, virtually all of the work completed under this project, whether at state or regional levels, can be tied back to the objective of building the three foundational pillars discussed at the beginning of this Part III. However, since so many individual initiatives and activities impacted more than one – and sometimes all three – of the pillars, the remainder of this discussion of process and accomplishments of this project will be chronological.

Importantly, as the state and regions move forward, the next major element to consider is focused and purposeful employer engagement at the regional level that positions key industry employers as leaders in the process. At that point, career pathways and the attendant training and education solutions are added. This requires additional and ongoing data work, among other things and, finally, operationalizing service delivery to employers and career seekers at SC Works Centers, colleges, and other local service delivery agents. For this reason, the statewide recommendations for moving well beyond foundation building that are offered in Part V of this report are organized in that order.

C. PROCESS and ACCOMPLISHMENTS: State-level/Statewide Activities

Just as it was important for the public sector foundation to be built prior to engaging employers, there was work to be done at the state level before the process could be taken to the regions. The regional configuration having been established, state-level planning, led by DEW and facilitated by Maher staff, included the following major activities:

- Establishment and convening of the Statewide Leadership Team
- Establishment and convening of the Interagency Statewide Data Team, a sub-team of the leadership team
- Development and delivery of a webinar “Introduction to Sector Strategies,” which was open to the entire state

1. **Statewide Leadership Team (LT)** – Because the project is sponsored by the State Workforce Development Board, with support from the Department of Employment and Workforce (DEW), the collaborative nature of the enterprise is represented by the multi-agency champions – DEW, the S.C. Department of Commerce, the S.C. Department of Education, and the S.C. Technical College System – and by the public/private sector Statewide Leadership Team. The Leadership Team is comprised of key executives and staff of the four Departments involved in the South Carolina workforce development system; other public and educational stakeholder representatives from the state, regional, and local levels; and business and industry representatives, including and especially those from likely targeted industry sectors. Their role is to provide leadership – to contribute social, political and intellectual
power as leaders and stockholders in the state’s broader Talent Development system. As such, responsibilities of the Leadership Team were to:

- Become fully oriented to the Team process
- Adopt Project Vision and Mission Statements as part of the Team Charter
- Promote the talent development concepts and processes throughout workforce and related systems
- Select/approve and build consensus on the statewide target industry sectors
- Identify critical issues to be explored during the project
- Receive, review, and refine the Team Facilitator’s (Maher’s) recommendations throughout and especially at the end of the project
- Work collaboratively, in an integrated fashion, to ensure that the talent pipeline process is fully developed
- Ensure that the State’s vision and the project mission are adopted by all partners as policy, and foster concurrence within the partner communities, including and especially the technical/community college, K-12, economic development and local workforce development systems

At its first meeting (August 2015), the Leadership Team adopted its Team Charter (see Appendix A), which included the following:

**Vision for South Carolina’s Talent Pipeline**

South Carolina will have a talent development system that supports strong regional economies by aligning the resources of all partners, public and private, toward developing a workforce supply chain that enhances development of consensus-based targeted industry sectors and creates meaningful career pathways for a range of workers and skill levels in important regional industries. The system will be characterized by a sustained, trusted relationship among the workforce system, education, economic development, and industry.

The Charter also included the project mission, context, team structure and roles, deliverables and timeline.

In addition to reviewing project progress and a discussion of next steps, the second Leadership Team meeting (November 2015) consisted of a data discussion presented by the Statewide Interagency Data Team (see #2, immediately below). The Team presented its analysis and recommendations for statewide target sectors and responded to leaders’ questions and concerns. The statewide target sectors agreed upon by the Leadership Team were:
- Diversified Manufacturing, including Metal and Metal Fabricating (including Vehicles), Textiles, Lumber Wood Products, and Chemicals, Rubber, Plastics
- Business and Information Technology Services
- Health Care
- Transportation, Logistics, and Wholesale Trade
- Construction

See Appendix B -- “Summary of Analysis of Statewide Industry Clusters in South Carolina.”

A third Leadership Team meeting is being held on June 30, 2016 to consider this draft report and its recommendations.

2. **Interagency Statewide Data Team** – A basic tenet of sector strategies is that strategies should be developed for critical industry sectors that are growing and that also provide a significant number of jobs with family-sustaining wages; and further, that data be used to **drive** decision making in terms of which sectors to pursue. Finally, and most importantly, all relevant public institutions and agencies must agree on the target sectors. As stated earlier, the overall objective of regional strategies is to **align all partners around developing the same industries**.

This can present a challenge, because ordinarily workforce personnel would concentrate on industries that provide a high number of jobs with family-sustaining wages; economic developers tend to focus on industries that are growing and that provide the highest wages; and educational institutions are often driven by student demand for instruction in certain industrial areas. Our solution is to implement the process for which is shown below:

**Target Industry Selection: Consensus-Based Decision Making Model™**

[Diagram of the process]

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Diversified Manufacturing, including Metal and Metal Fabricating (including Vehicles), Textiles, Lumber Wood Products, and Chemicals, Rubber, Plastics

Business and Information Technology Services

Health Care

Transportation, Logistics, and Wholesale Trade

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To implement the model, Maher developed a series of data reports and a comprehensive analysis of the data, then convened the Statewide Interagency Data Team comprised of representatives from the workforce, education, and economic development systems. The Team began its deliberations in late 2015 with a series of webinars and conference calls, as its members worked with the Maher data consultant to understand the data itself, its interpretation, and its possible implications for establishment of Regional Data Teams.

A protocol for further analysis was developed and included a number of questions that were key for setting policy for identifying growing sectors and sub-sectors, and then combining them into industry clusters that would prove more useful for both planning and operational purposes down the line.

For a comprehensive report on the statewide data runs, bubble charts and related analyses, a discussion of industry sectors vs. clusters, and the Data Team deliberations, see Appendix C – “Final Report of Statewide Industry Clusters”. Those industries selected as statewide targets are identified there and were listed above under #1. The interagency data team serves a number of functions beyond merely recommending statewide target sectors to the Leadership Team. For example, the State Team decided that Regional Data Teams should be established and use a similar process to define the priority industries for their areas. In so doing, the Team modeled a process that regions otherwise might be reluctant to take up. In addition, the Statewide Team will reconvene in order to:

- Find ways and means of integrating all statewide data needs related to building the talent pipeline on an ongoing basis
- Provide integrated support to regional data teams as they are formed
- Help regions connect with the supply side of sector work through career pathways and their alignment to the skill acquisition in the state

Additional data-related and team-based recommendations are included in Part V of this report.

3. “Introduction to Sector Strategies” Webinar – In November of 2015, Maher presented a webinar presided over by DEW Executive Director Cheryl Stanton. This webinar was announced and open to all workforce, economic development and education personnel throughout the state, and was designed to provide a basic introduction to the sectors concept and to the project. It was also designed to engender interest among local staff to serve on regional sector planning teams. As such, it provided a transition to regionally-focused activities.

The agenda included an Introduction to Workforce Alignment through Sector Strategies: Driving Talent Pipeline Development and Economic Growth; Project Overview; The Key Element: Regional Teams; Hearing From You; and Next Steps in the Project.
D. PROCESS and ACCOMPLISHMENTS: Regionally Focused Activities

The activities discussed in this section provided the background for eventual formation of, and formally convening, Regional Sector Planning Teams. Three major project activities were successfully undertaken:

- Development and Facilitation of a one-day Sector Strategies Orientation Seminar (SS 101) in December of 2015
- Prepare for and hold a two-day onsite Regional Institute for those who would ultimately comprise the four Regional Sector Planning Teams (Regional Teams)
- Begin to develop and deploy an online toolkit/website to serve as an ongoing Community of Practice that facilitates communication and learning among all parties to strategy development and implementation

1. **Onsite Sector Strategies Orientation Seminar** – This one full day Sector Strategies 101 Training Session was held onsite in Columbia in December of 2015 and was attended by representatives from the following:

   - Adult education
   - Community/human services
   - Economic development
   - K-12 education
   - Post-secondary education
   - Vocational rehabilitation
   - Workforce development

This event also marked the beginning of the process of building regional sector planning teams. Although Regional Teams were not designated going into the session, many of the activities were organized around representatives gathering in those regional configurations. As a result, coming out of the session, each region had chosen a single point of contact (SPOC) to spearhead continuing team development going forward. Objectives for the session included:

- Ensure all have a firm understanding of the basics of a sector strategy approach to workforce development, building a talent pipeline, and the vision for workforce development in South Carolina.
- Describe, demonstrate, and discuss how the sectors approach will be developed throughout the state.
- Begin process of developing regional knowledge, regional identity, and regional teams.
- Achieve strong commitments among all partners to move forward collaboratively.
Two key activities that were modeled and begun during this session, and completed later in the process, proved to be vital in the critical process of developing regional teams:

- **Asset Identification Exercise** – Regional representatives, many of whom were unaware of neighboring workforce area activities, were asked to identify key assets that exist in the region. As a result, participants learned about the partnerships, business engagement innovations, knowledge, targeted activities/programs, joint planning, and other initiatives that had been taking place virtually next door in neighboring workforce areas, colleges, etc.

- **Regional Self-Assessment** – Regional groupings began to complete a Regional Self-Assessment that both educated them about sector strategy concepts and helped them objectively assess their readiness to plan and implement. This process also educates the consultants and state leaders as to the System’s relative strengths and weaknesses, and therefore our points of emphasis going forward in the project.

The self-assessment was organized into categories representing the six critical success factors for building world-class sector strategies.
2. **Onsite Two-Day Regional Institute** – This two-day statewide planning Institute was held in March of 2016, following a protracted process of identifying and recruiting cross-agency, regionally-based teams. Rather than attempt to mandate participation from each agency at specific levels of management, we followed principles of “starting with a coalition of the involved and inspired”, counting on those individuals to then help complete rosters that would eventually provide for full representation. Regional SPOCs (Single Points of Contact) were identified during the orientation seminar to fill rosters of representatives from agencies across each regional area.

Stated objectives were as follows:

- Increase understanding and acceptance of *Sector Strategies* as:
  - The vision for workforce development in South Carolina; and
  - The strategic framework and operational approach for effectively building talent pipelines
- Build regional teams’ ability to plan and implement sector approaches based on six critical success factors
- Embark on a focused process to produce regional plans to implement regional sector strategies
- Prime teams for additional planning technical assistance (TA) under the current project
- Achieve strong commitments among all partners to move forward collaboratively

In fact, this session was the keystone for establishing regional identities and focusing key personnel on a broader industry-focused, partnership-based talent development agenda. In other words, attendees generally understood the compelling argument for regions, sectors and career pathways.

Regional teams were facilitated through a process of deciding on their focus industries and assisted in constructing plans to intensively engage employers and begin building an initial sector partnership.
Participating team members heard a spirited overview serving to ground them, once again, in sector strategies; received key guidance from an employer panel; had regional time with the statewide data consultant; viewed a preview of the interactive website discussed below (#3); and completed regional SWOT (Strengths, Weaknesses, Opportunities, and Threats) analyses. Perhaps most important, the Institute provided significant time dedicated to action-oriented Maher-facilitated planning by the regional teams. This planning then became the focus of ongoing, expert virtual and onsite technical assistance and facilitation from Maher staff – the same individuals who facilitated planning at the Institute. That process, and the outcomes, is discussed in detail in Part IV of this report.

3. **Interactive Website/Community of Practice** – During this period, the design of an interactive website that will serve as an ongoing Community of Practice and learning forum (home page pictured below) was developed. Website design, construction, and content provision and loading has continued, and the site should be actively deployed early in July.
III. Development of Regional Teams and Implementation Plans

A. INTRODUCTION

Throughout the planning process, the four regional teams worked with their facilitators to build matrices detailing their plans for implementing industry sector strategies. Those plan matrices are provided in Appendix E, in combination with narrative reports developed by Maher facilitators that outline each team’s development and planning process and provide recommendations to guide ongoing work. This section of the report also synthesizes major themes that emerged across the four teams throughout the planning process. Updated regional data reports for the teams are included in Appendix D.

B. MAJOR THEMES

The following themes emerged across regional planning efforts as common areas of focus:

1. Regional teams need visionary leadership and a shared sense of ownership among partners: Regional teams accomplished a significant amount of work together in a relatively short time, particularly considering that this was the first time many partners were coming together on a truly regional basis. That said, all of the teams are to some extent still developing, organizing, expanding and determining how they will work together moving forward. Identifying at least one individual who will serve in a transformational leadership role, and champion and coordinate the work of the team is critical. Some teams have already found this champion, while others have not. As important is the need for all partners on the regional teams to fully commit to the process moving forward and exhibit a shared sense of ownership of the teams’ work. In some cases, one or two partner organizations have been the primary drivers of the teams’ work thus far; as teams evolve, cultivating engagement and support among all partners will be essential.

2. Regional teams are prioritizing the scaling of successful but more localized partnerships and efforts: In all of the regions, there are “pockets” of innovation around sector partnerships and sector strategies, and bringing these to true regional scale is important to the teams. A key benefit of many teams’ work to date has been sharing information about efforts in areas throughout the region; teams are now exploring how such efforts can be better connected and expanded at the regional level. To achieve this goal, team partners will be focused on aligning their plans, priorities, efforts, and resources.
3. **Regional partners want to expand and enhance sector-based business partnerships and service delivery:** Teams seek to engage with employers in new and deeper ways, moving beyond “one-off” relationships and transactional labor exchange to robust partnerships and diversified workforce solutions. As teams move forward, they will be looking to build business engagement in their work, convene targeted sector employers at scale, and build sustainable employer-led partnerships. Regional partners are also exploring the development of unified region-wide business services teams to coordinate and align employer service delivery and streamline and improve the service experience for employer customers.

4. **Sector strategies and career pathways ultimately need to be operationalized at the service delivery level:** As regional partners move forward, they will need to examine their current staffing, organization, and service delivery structures and align them to the workforce needs of targeted sectors and to career pathways within those sectors. Partners will need to ensure that staff at all levels of their organizations understand the focus on sector strategies and what that focus means for their jobs. Training and capacity development will be important to enable all staff to operate successfully in a sector-driven service environment.

5. **Maintaining momentum and building sustainability are important concerns:** Teams will need to maintain the momentum begun under this initiative and find ways to support ongoing communication, coordination among partners, regional plan development and, ultimately, plan implementation and tracking. Teams may consider designating a lead organizing partner, and some are considering a subcommittee model to organize around and tackle priority plan areas. Teams should also be thinking now about ensuring the sustainability of their efforts over time, which will require shared investment, financial and otherwise, across regional partners, and new ways of aligning and braiding resources to implement plan strategies at regional scale.

Technical assistance and training needs indicated throughout these major themes are included in statewide recommendations in Part IV. As noted above, region-specific recommendations for moving forward are included in the following narratives. The Regional Narratives begin on the next page, and are presented in the following order:

1. South Coast
2. Central
3. Pee Dee
4. Upstate

The Plan framework matrix for each region may be found in Appendix E.

C. **REGIONAL NARRATIVES**
1. Team/Planning Development Process

The South Coast Region includes two Local Workforce Development Areas – Lowcountry and Trident – and seven counties – Beaufort, Berkeley, Charleston, Colleton, Dorchester, Hampton, and Jasper counties. The regional planning team includes representatives from Workforce Development, Economic Development, Education – K-12, Adult Education and Literacy, and Career and Technical Education – Vocational Rehabilitation, and Community Based Organizations.

Some of the initial members of the South Coast Planning Team attended the Sector Strategies 101 Training in December 2015, where they learned and discussed how the sectors approach would be developed throughout the state. The meeting immediately sparked an interest in forming partnerships and designing plans on how to develop a regional data-driven and business-led economy. It is notable that, not too long prior to the sector strategies project initiation, the Charleston Metro Chamber of Commerce (CMCC) and Charleston Regional Development Alliance (CRDA) initiated an economic development planning initiative called One Region, which set out to address critical community challenges, advance target clusters and competencies, and coordinate activities across systems in Berkeley, Charleston, and Dorchester counties. Fortunately, but not coincidentally, one of the South Coast Region Planning Team members, Amy Brennan, also serves on the One Region advisory group. She provided a link between the two initiatives, allowing the team to plan efficiently, effectively and, most importantly, without duplication of efforts.

Following the December meeting, the interim on-site point of contact diligently worked on expanding the team roster and planned the first team meeting for March 2, 2016, at the Trident SC Works Center in North Charleston. Several team members were already familiar with each other and accustomed to working together across systems and even across local workforce development areas. This provided an enormous advantage in developing sector strategies and building talent pipelines across the region. The main goal of the initial meeting was to conduct an in-depth self-assessment, designed to determine their region’s readiness to implement sector-focused approaches. Questions explored included:
1. Are workforce, economic development, and educational institutions using/sharing the same data to determine key growth sectors, identify specific skills needs, level of demand, and education and training gaps?
2. Are target sector employers fully engaged as part of an operational or developing sector partnership?
3. Are appropriate mechanisms in place to ensure timely and effective communications among partners?

The conclusion drawn from the self-assessment exercise was that there are various viable initiatives underway and processes in place within each partner entity and LWDA. However, more focus needed to be placed on aligning plans, processes, and resources in order to successfully scale demand-based strategies to a streamlined regional level. The second meeting was held on March 16, 2016, at the Colleton SC Works Center in Walterboro. Team members completed a “mini asset mapping” exercise, i.e., a process to identify and take inventory of existing services, projects, initiatives, partnerships – the entire range of existing resources within a region – that might be accessed to support sector strategies development and implementation. Assets identified, for example, were the South Carolina Work Ready Communities initiative, the One Region plan in Charleston, and each LWDA’s business services team, which include partners from the Workforce Innovation and Opportunity Act (WIOA), Vocational Rehabilitation, the Department of Social Services, the Department of Employment and Workforce, readySC™, Economic Development, the Technical Colleges, and other partners. The conclusion drawn at the first meeting was supported by the outcome of this asset-mapping exercise. Each LWDA already had a relatively solid basic structure in place for a business-led workforce development system. It was just a matter of devising a plan to unify efforts among partners, eliminate duplication, and expand efforts regionally.

At the Sector Strategies Regional Planning Institute in March, and during an all-day comprehensive in-person meeting in April, the team designed the South Coast Sector Strategies and Talent Pipeline Planning Framework, a living and breathing document that reflects detailed goals, strategies, and action steps planned in support of this initiative. The development of this Planning Framework was guided by the results of a SWOT analysis (strengths, weaknesses, opportunities, and threats) that was completed at the beginning of the Institute. The SWOT analysis revealed several regional patterns, including but not limited to:

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abundant job growth</td>
<td>Pockets of geographic locations where access to education is extremely limited</td>
</tr>
<tr>
<td>Industries/employers have a desire to partner with workforce development entities</td>
<td>Large segments of the regional population lack reliable transportation</td>
</tr>
<tr>
<td>Excellent geographic location and superb quality of life</td>
<td>There is a general lack of awareness of the available workforce system service repertoire</td>
</tr>
</tbody>
</table>
Opportunities

- Efficiently address the “boardroom to mail room” disconnect
- Rebranding and change in marketing strategy for the chosen priority sectors
- Scale existing sector work/projects to a regional level

Threats

- Lack of complete system buy-in for sector strategies
- Funding for education in South Carolina is low in comparison to other states

Some goals have already been accomplished, such as the expansion of the team membership to become more representative of all public partners and entities involving economic and workforce development, the development of a vision to drive the work performed by the team, and the formation of a data committee to support detailed analyses of industry sector and occupational data over time.

The team was and continues to be guided by a core group of five members from various entities and LWDAs who volunteered to be the on-site points of contact:

- Core Group Members
  - Hank Amundson, Workforce Development Director, Lowcountry Workforce Development Area
  - Sharon Goss, Workforce Development Director, Trident Workforce Development Area
  - Amy Brennan, Executive Director, Center for Women
  - Julie Kornahrens, Director of Adult and Community Education, Dorchester County Adult Education
  - Kim Statler, Regional Workforce Advisor, South Carolina Department of Commerce

The team adopted the following vision statement: “Data-driven and employer-validated talent solutions that integrate regional education, workforce and economic development resources across systems to empower employers, individuals, and communities to prosper and grow the region’s economy.”

## 2. Target Industries

The team analyzed a comprehensive set of data relating to regional economies, industry sectors, and clusters. The data for each industry cluster was organized by the following three metrics: 1) location quotient (concentration of industry employment in the area as compared to the national average), 2) percentage increase in employment from 2015-2025, and 3) size of employment in the industry.
The team was rather certain – due to prior work and familiarity with the local economy – that manufacturing would be one of their primary focus areas. The data analyzed affirmed this decision through the sheer size, concentration, and growth of the industries. Considering that the manufacturing base is very diverse in the region, it was decided that the Metal and Metal Manufacturing, Lumber and Wood Products, and Communications and IT Manufacturing industries be consolidated into a Diversified Manufacturing cluster.

Other industries’ growth rates, concentration, and size were also analyzed. Additionally, the group considered questions such as:

- Should Real Estate and Building Services be a cluster with its large number of part-time workers and relatively low wages for wage earners?
- Should Hospitality and Retail be included because of its tendency to grow low-skill, low-wage jobs with ill-defined career pathways?
- Should Business Services be a cluster, given that it appears to be driven by the Temporary Help Industry?

In conclusion, the following focus areas were agreed upon:

<table>
<thead>
<tr>
<th><strong>Primary Target Sectors</strong></th>
<th><strong>Secondary Target Sectors</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversified Manufacturing</td>
<td>Construction Trades</td>
</tr>
<tr>
<td>Healthcare</td>
<td>Information Technology (IT)</td>
</tr>
<tr>
<td></td>
<td>Transportation, Distribution, and Logistics (TDL)</td>
</tr>
</tbody>
</table>

This is in agreement with the analysis and recommendations outlined in the Charleston Region Talent Strategy and the One Region plan.
3. Sector-specific Target Occupations

Two sector-specific data committees were formed, one for Diversified Manufacturing and one for Healthcare, each of whom conducted detailed analyses of the employment needs for their respective target sectors. Factors considered, for example, were the employment change between 2015 and 2025, the median hourly earnings, and the typical entry level education and/or work experience required. Each committee decided on a different number of target occupations, based on different demand and industry structures.

Examples for the recommended Healthcare occupations include but are not limited to:

- Personal Care and Home Health Aides
- Registered Nurses
- Medical Secretaries, General Office Clerks, and Receptionists

It is noteworthy that the Healthcare Data Committee also recommended placing priority on the Patient Care Technician (PCT) occupation, which typically requires Certified Nurse Aide (CNA) training, instruction in the use of electrocardiogram (EKG) equipment, CPR training with certification, and basic phlebotomy. However, as this occupation is reflected as separate components/occupations in the data analyzed (e.g., CNAs and Phlebotomists), additional research needs to be conducted to determine the accurate demand.

Examples for the recommended Diversified Manufacturing occupations include but are not limited to:

- Aircraft Structure, Surfaces, Rigging, and Systems Assemblers
- Inspectors, Testers, Sorters, Samplers, and Weighers
- Team Assemblers

The Diversified Manufacturing Data Committee further recommended, and the team agreed to, analyzing the employment needs for the three remaining target sectors in the near future. The Diversified Manufacturing and Construction Trades sectors have overlapping occupations. Additionally, there are “back office” occupations across all industries. While extensive sector strategies may not be developed for the secondary focus sectors right now, the team feels it is necessary to look at occupations across the board to ensure that all “cross pollination” of skills and training needs are considered.

All data analyses were completed by the end of June 2016.
4. Key Goals

The following is a summary of the team’s key goals and plans for the future.

Industry Focus Groups - The team will work with industry focus groups to validate data analysis results, career pathways, training, and service delivery designs, as well as to obtain additional non-data related industry intelligence. This approach will create buy-in and maintain ongoing open channels of communication for the continued improvement of demand-driven strategies. Validation will also be sought from entities such as Ready SC, the Department of Commerce, and from studies such as the Workforce Supply and Demand Gap Analysis in the Charleston Region Talent Strategy. The team will begin designing this process in June, with a targeted implementation date of August 2016.

Rebranding and Marketing - Throughout the planning process, the following challenges were identified:

- There's a lack of a uniform message across all partner entities.
- There’s great room for improvement when it comes to adapting marketing/outreach to the various target populations (e.g., youth, unemployed, individuals with disabilities, veterans, etc.).
- Employers and job seekers are not fully aware of the services available to them in the public system.
- Outreach is oftentimes reactive rather than proactive.
- High school Individual Graduation Plans (IGP) are not in alignment with industry needs.
- There’s a specific lack of awareness (and acceptance) among educators, students, and parents regarding career paths other than the “traditional” progression from high school to a four-year college (e.g., apprenticeships).
- Many people, particularly youth, still hold an antiquated perception of what work in the manufacturing sector looks like. Even in today’s time of high-tech industries, manufacturing work is commonly associated with dirty environments, strenuous physical activity, and lack of advancement opportunity.

The team will design a collaborative rebranding and marketing strategy to address these challenges by November 2016. Tactics will include grassroots efforts such as door to door campaigns in targeted (vetted) residential areas of high student concentration, use of social media, and traditional approaches such as career and/or apprenticeship fairs.

Talent Pipelines and Career Pathways - The most recent Workforce Supply and Demand Gap Analysis (as part of the Charleston Region Talent Strategy) was released June 24, 2014. A revised version is expected to become available in the near future. The goal is to ensure that talent pipelines are understood and marketed by all partners equally and to develop additional talent pipelines and/or expand currently available pipelines, as needed. Additionally, the team plans to explore the scalability of the career pathway outlines used by Berkeley County CATE
and to engage in the career pathway development efforts currently underway in connection with the SC Department of Education’s recent grant awards.

**Rural Transportation Gap** - Large segments of the regional population lack reliable transportation. This impedes a great number of job seekers from accessing public assistance, education, and jobs. Partners will discuss options and design a plan to close rural transportation gaps with regional entities such as:

- Charleston Area Regional Transportation Authority (CARTA)
- Palmetto Breeze, formerly Lowcountry Regional Transportation Authority (LRTA)
- TriCounty Link
- Uber
- Park & Ride
- Catch-A-Ride

This effort will be undertaken at a later point (beginning November 2016), when sector strategies have been more solidified.

**Staff Training** - Partners are dedicated to ensuring a unified approach and unified messaging regarding regional sector strategies to all stakeholders. Stakeholders includes staff (from “board room to mail room”) within each partner’s entity. Additionally, the team is committed to aligning and integrating resources in terms of business services to ensure employers are engaged as effectively as possible and without duplication (“one knock approach”). To support this effort, the team will further develop their business services teams and conduct quarterly regional business services team meetings and training to determine best practices and ensure ongoing effective communication. Similarly, the region will hold bi-annual regional staff meetings and training to keep staff updated and ensure professional development is aligned with the strategic plan.

**5. Team Technical Assistance Needs**

The South Coast Team is well-positioned to carry the work begun under this effort forward. While the team has not identified any specific technical assistance needs at this time, the following assistance could support the team’s continued momentum:

- Support with ongoing planning, communication and coordination among partners, meeting and planning facilitation, and general and sustained organizing support.
- Regional team members are motivated to move forward, but process and planning guidance would better enable and support their success.
6. Recommendations for Next Steps and Continued Progress

The South Coast Region Planning Team accomplished a great amount of work in the course of just a little over two months. Team members are to be commended for their hard work, dedication, and efforts. In only four meetings, they were able to lay solid groundwork for long-term, sustainable sector-based strategies through the deepening of collaborative relationships, the creation of a team organizational structure, and development of buy-in. If plans are implemented as outlined in the South Coast Sector Strategies and Talent Pipeline Planning Framework, the region is highly likely to find itself on a successful path to effectively meeting business needs, reducing un- and underemployment, and attaining steady economic growth. Going forward, there are four major recommendations to ensure ongoing success.

Alignment and Integration of Business Services - Each LWDA in the South Coast Region has a business services team and it is intended that these teams will meet on a quarterly basis in the future to discuss best practices and ensure ongoing effective communication. This is vital to the implementation of successful sector strategies and the region is commended for prioritizing this effort.

The recommendations offered here are as follows:

- **Short Term** - For the individual teams within each LWDA, alignment should be extended beyond the partner agencies currently involved. Economic development takes high priority in the South Coast region due to the extensive manufacturing base surrounding the Charleston port area and along the coast line. As a result of that, there are various efforts underway that involve communication with and require feedback from employers, for example SC Work Ready Communities, One Region, and the Charleston Region Talent Strategy. It is essential that business services teams ensure their close alignment with these existing efforts, coordinate, connect, and align all local grants, programs, and assets, and not duplicate frameworks that are already in effect.

- **Long Term** - The Trident and Lowcountry LWDAs should design a long-term plan to unify the individual LWIs’ business services teams into one strategic regional team. Currently, there are pockets where business services are localized, (sometimes) single-agency, “menu-based”, and focused largely on labor exchange. In order to develop a system where regional employers’ workforce and education needs truly drive goals and strategies, business services should be a) regional and b) coordinated/integrated among all partners (workforce development, community colleges, and economic development agencies, at a minimum) to deliver specific, customized solutions to employers. (In the most ideal situations, those solutions are created by and for employers as a group within specific targeted high-growth industry sectors.)
To facilitate this alignment and integration, it is vital that partners develop a reliable approach by which information is exchanged consistently and frequently among workforce development, education, and economic development partners. The team must maintain constant awareness of (ever-changing) business needs, contacts made/services provided, as well as outcomes. Ideally, the region would investigate and acquire a unified, real-time Customer Relations Management system to which all partners have read/write access. Understanding that, at the local and regional level, this may be an overly ambitious goal, it is recommended that, at a minimum, some other (more basic but yet reliable) form of communication be established such as (bi-)weekly regional business services reports (including but not limited to the information outlined above) and/or document sharing through cloud systems.

Optimization of SC Works Center Organizational Structures - The South Coast Sector Strategies and Talent Pipeline Planning Framework includes a plan for quarterly business service team meetings/trainings and bi-annual regional staff meetings/trainings. The following recommendation, similar to the above, suggests expanding on this plan.

In order to ensure that services delivered to employers and job seekers are, effective, efficient, and streamlined, partners must ensure that SC Works Center organizational structures are optimized. For example:

- All SC Works Center staff and partners should be organized by function; not by program.
- Partners should align their workforce system policies and procedures.
- Services delivery must be integrated across programs.
- Customer flow and customer service should be designed using principles and methodologies of Human Centered Design, Lean Management, and Kaizen.

This will reduce complexity, eliminate waste, and help managers and front line staff focus on what really matters: employers and job seekers.

Examples of optimized systems include but are not limited to effective triaging of customers upon entering an SC Works Center, universal job seeker assessments, reliable and trackable customer referral systems, and cross training of all staff on basic partner program offerings and limitations as well as general community resources.

Last but not least, it is vital that business services teams and staff who primarily serve job seekers are in constant close communication in order to close the gap between supply and demand.
Common Language - Education and workforce development define and talk about sectors (clusters) in different ways; therefore, it is imperative that all partners agree on a common language when addressing students, parents, educators, job seekers, employers, etc. The team’s plan includes the design of materials for each partner entity to use in staff training (to be accomplished in July 2016). This is a worthy starting point. However, it is recommended that this common language be applied across the board to all forms of communication, not only to verbal communication from staff to customers. Messages must be uniform and universal at all levels. This includes but is not limited to outreach/recruitment tools and materials, websites, curricula, and written policies and procedures. The South Coast Planning Team should design a phased approach for all partners to systematically assimilate to a common language and message.

Long-term Sustainability - The South Coast Sector Strategies and Talent Pipeline Planning Framework is fairly comprehensive in its current format. When taking the recommendations laid out herein into consideration, the planning team is faced with a considerable undertaking. The five Core Group Members (outlined above) have committed to a leadership and guidance role; however, it is not feasible to plan, organize, and execute these strategies without dedicated time and effort. It is recommended that (at a minimum) the Core Group Members seek authorization from their respective employers to dedicate a regular, set amount of working time to the administration of sector strategies.
1. Team/Planning Development Process

The Central Region leadership started the process expressing concerns regarding whether or not they were a legitimate region. Two of the Local Workforce Development Boards (LWDB) have worked together in the past and one LWDB worked closely with Charlotte, NC. The Adult Education lead stepped up to serve as the point of contact initially. Over time, one LWDB stepped up to serve as a point of contact as well. A Core Leadership Team was established, comprised of the three LWDB Directors and the Adult Education point of contact.

Over time and after a meeting with one of the LWDB Directors at the Southeast Employment and Training Association, the Central Region team was able to advance the agenda around foundational activities. The Core Team shored up its regional membership through personal calls and communications by LWDB directors and other team members. The Regional Team grew from 17 members to 25 members. Over half of the Regional Team members completed the self-assessment individually and then discussed the responses collectively on a Regional Team call. Thus, the Regional Team did finalize the self-assessment prior to the March 2016 Regional Planning Institute. However, the Core Leadership Team did not feel comfortable with the asset mapping process despite a few conference calls, reviewing the December training materials and discussing how the tool has been used in other places. It was also discussed on a regional call and the Regional Team decided not to complete the asset map prior to the Institute. The Team felt it would make more sense to do so after prioritizing sectors at the Institute.

The Regional Team had a very good turnout with 20 members participating at various times during the SC Institute. As the Regional Team was still forming, some planning time was dedicated to members expressing what they would like to accomplish as a Regional Team. After reviewing the data report and discussing sector priorities of Regional Team members and their organizations, Manufacturing was selected as the priority sector to complete the planning matrix around. The Regional Team also asked for some additional data reports. During the Institute, there was a spirit of cooperation and a number of partners put forward goals and strategies for five of the six planning categories they were able to work through in the
timeframe, including the completion of the asset map based on the sector they prioritized. Some members felt overwhelmed at the end of the Institute, though overall the Regional Team was able to build a good base for a strong working relationship.

The Regional Team then reconvened in late April with 17 members in attendance. While reviewing the progress made during the SC Institute, some of the members again expressed the magnitude of the work ahead. The Team agreed to build on existing work in the region when and where possible; for example, the communications and marketing materials recently developed by the Manufacturing Association. It was impressive to see the number and diversity of Regional Team members volunteering to be the lead on action steps agreed upon during the meeting. Though significant progress was made completing the planning matrix, the Regional Team expressed disappointment that the K-12 partners have not been active participants to date. Regional Team members have agreed to reach out to K-12 members as well as solicit other potential candidates to join, if needed. The Regional Team also agreed to continue building out action steps, responsible parties and timelines for those goals via weekly conference calls through the end of May.

The Regional Team has developed a thoughtful plan and is still in the process of storming, norming and conforming. Therefore, it is essential that time be spent on identifying a true champion and driver for the regional work to serve as the Chair of the Regional Team. Also, diversifying the Core Leadership Team may make sense to ensure other key stockholders remain committed long-term. The efforts to ensure an engaged K-12 presence is an important task to complete in the near future. Then continued team development along with regular face-to-face meetings will aid in strengthening trust and credibility among all the Regional Team members. Finally, an accountability and transparency plan is critical to ensuring that all partners are accountable for the deliverables and timelines outlined in the planning matrix.

2. Target Industries

The Regional Team reviewed the Maher regional data report prior to the SC Institute in March and came prepared for a discussion with the Maher team’s data expert and SC Labor Market Information staff. After the initial session on the first day, the Regional Team requested additional data including: breaking down of Business Services; combining Logistics and Wholesale; merging IT and Communication services; and uniting all Manufacturing including Textiles. The Maher and SC experts also met with the Regional Team on the second day of the Institute and the discussion spurred some additional strategies included in the planning matrix around both skills pathway and wage pathway analysis. The Regional Team also preliminarily identified three targeted sectors until reviewing the additional data requested. Those sectors include Manufacturing, Health Care, and Transportation, Distribution and Logistics.

Manufacturing was selected by the Regional Team as the first sector to build out not only because the data clearly supported focusing on this sector, but also because most of the partners had already identified it as a priority as well. The Regional Team received the
additional data requested two weeks after the Institute and reviewed in preparation for their next team meeting in late April. The additional data was discussed at that meeting and their decision to complete the planning matrix based on the Manufacturing sector was reaffirmed and no changes were made in the other targeted sectors. Finally, the asset map template was distributed as a follow-up to the April Regional Team meeting, the results of which will be discussed and inform the work detailed in the planning matrix.

3. Key Goals

Key goals related to gathering, analyzing, and validating workforce data/intelligence include:

- Identifying industry position;
- Completing a skills gap analysis;
- Validating data with the business community;
- Conducting a career pathway analysis; and
- Collecting and assessing regional workforce demographics.

This will allow the new Central Region to have an:
- in-depth understanding of this new geographic region; reimagine itself within this new regional area; align partners around a priority sector; and provide the foundation on which to develop a regional vision for the Manufacturing sector. It will also serve as the backbone for the promotion and education on workforce needs.

- As for forming sector partnerships by convening, partnering, and articulating a vision, the Central Region developed some important goals. They include: asset mapping existing manufacturing partnerships; convening with core leadership ("HR roundtables") in existing partnerships; reaching consensus on a regional vision; setting goals to support the vision; and developing a communications and recruitment strategy. The asset mapping process will be a launching pad for expanding collaboration across the area among partners and other stakeholders. The process of establishing a regional vision and goals will help build trust among partners as well as possibly help build out a regional infrastructure by formalizing the regional team that is recognized as such.
• When it comes to assessing employer-defined talent needs, the Regional Team established the following goals: conducting research; encouraging employers to develop skill-based job opening descriptions; reviewing curriculum maps for pathways by employers; and employers identifying the appropriate certification and credentials needed. First and foremost, the strategies associated with these goals will significantly enhance business and industry engagement. This important work will also bring to light differences in the K-20 education continuum, establish an employer driven definition of soft skills, and the development of and/or refinement of curriculum.

• The Central Region Team set some foundational goals around developing strategies and aligning resources. Key goals are: creating a service delivery process flow chart; establishing roles and responsibilities of partners; determining who can pay for what; and reviewing procurement. These efforts will highlight more effective ways to partner and leverage resources. They will also put a fine point on how the Central Region Team can truly collaborate and work together as a region. In addition, reviewing and retooling procurement processes and scopes of work across partners, where that is feasible, can begin to support the regional vision and goals. Finally, it will allow the maximization of time, talent and financial resources as the federal, state and local resources are not expanding.

• Then as the work shifts to operationalizing in job seeker/student and business service delivery, the Team identified five specific goals. They include: developing a communication strategy for business services; delivering professional development on partner services; developing an outreach message based on review of marketing materials and merging them; setting regional performance goals; and updating policies and procedures. A vital outcome of this work includes streamlining relationships and services to make it easier for business and individual customers to work with the system, eliminating the duplication of services, and expanding business retention efforts. It will support the development of the necessary regional infrastructure and communication strategies as well.

• The Team then developed goals around assessing, adjusting, improving and sustaining the work. The goals in this area are: understanding new performance measures; obtaining baseline data; setting targets; evaluating progress and performance; and retooling as needed. The Central Region Team will benefit from this process because all members have a commitment to workforce development in SC. They also have similar workforce goals regarding sector priorities. In closing, this accountability process will increase cross-county legislative advocacy among local elected officials.
4. Team Technical Assistance Needs

A continued theme from Central Region Team members is that they have felt overwhelmed by the process and the plan. Consequently, some dedicated time to building an operational structure for the Team would be worthwhile. The planning matrix can serve as a great resource in formalizing the Team structure; for example, subcommittees could be formed based on key plan matrix priorities. It may provide key insights regarding potential candidates to diversify the Core Leadership Team. This could be achieved with the support of a facilitator and/or the Core Leadership Team initiating the process. Another strategy to tackle this issue is to identify resources that can be dedicated to this work including staff time and funding. The completed asset map could also bring to light existing resources and tools that can be brought to bear in implementing the plan.

Other technical assistance needs include:

- The Regional Data Team plays a pivotal role in the strategic plan. The Data Team should be able to provide valuable insight on regional capabilities and current strategies, while also maintaining a data-driven scope. Thus, the appointments of the team members are critical, as is the training and support of the Team as it begins its work. Support from an experienced region or subject matter expert could be beneficial to support them in their early work.

- Much of the Central Region plan is grounded on business engagement. The workforce system often has a transactional relationship with business as opposed to a structured business engagement strategy. Both sector strategies and career pathways development need to be employer-led efforts. This is a paradigm shift that requires technical assistance and support that this region could benefit from, including: strategies for engage businesses; techniques for sustaining that engagement; best practices around forming and maintaining partnerships; and enhancing skill sets in facilitation and negotiation.

Meeting these technical assistance needs, along with those suggested in the first section of the report, will provide an excellent start for this new region.
5. Recommendations for Next Steps and Continued Progress

After the Central Region firms up its organizational structure and creates a viable regional vision and goals, there are seven other actions that would prove beneficial long-term and are detailed below:

- Build ongoing leadership;
- Expand the tent;
- Implement a communication plan throughout the region;
- Take the best cross-agency initiatives to scale in the region;
- Pursue customer-centered design;
- Develop a unified business services strategy; and
- Develop a sustainability plan.

The first technical assistance need is ongoing regional leadership. The LWDBs have served as the Core Leadership Team because of the expectations associated with the Workforce Innovation and Opportunity Act. However, if this regional work is to be truly collaborative and sustainable, there needs to be visionary regional leadership at the helm and a shared sense of ownership among the partners. In the planning meetings to date, the points of contact have done a nice job organizing the process and running the meetings. Critical to the Central Region’s ongoing success is identifying within the Regional Team or recruiting someone from within the region to serve as the transformational leader.

There is also a need for expanding the tent. As noted earlier in this report, the first priority is to have robust participation by K-12 partners on the Regional Team and in the execution of the Manufacturing sector strategic plan. There is also a need for key business representation on the Regional Team. In addition, there should be a communication plan throughout the region among all the partner groups to ensure the vision and work of the Central Region is thoroughly understood and embraced region-wide. These efforts feed the next recommendations.

There are collaborative efforts going on in each of the three LWDBs. The key is to take the best cross-agency initiatives to scale in the region. This will create stockholders in the region and provide concrete opportunities to work collaboratively across partners. This will also support braiding resources as well as aligning resources to effectively meet business and individual customer needs.

As the plan is executed, there will be critical input gathered regarding business needs that will impact service delivery for both the individual and business customers. Customer-centered design could be an excellent tool to take the feedback and turn it into meaningful service delivery changes. The model takes research and synthesizes that research, which leads to ideation. The ideation efforts then result in prototyping. The prototyping work then leads to the restructuring of services to targeted customers and/or process improvements.
The region has agreed to a comprehensive business communication strategy as well as a business engagement strategy. Nationally, feedback from business illustrates a desire for an orchestrated business service strategy. Therefore, the Central Region may want to embrace a unified business services strategy after the foundational communication work is completed. Another consideration based on the business feedback is expanding sector outcome measures beyond federally-mandated program measures like industry sector penetration, reduced turnover for business customers, etc. This will demonstrate a commitment to the business community that the workforce system is accountable to meeting the Manufacturing sector’s unique needs in the Central Region.

Finally, there is a need to develop a sustainability plan in the Central Region. This may require frank discussions among partners regarding what will keep them at the table as well as what they are willing to put on the table to ensure sustainability. It can also be grounded in the asset mapping work outlined in the planning matrix.
1. Team/Planning Development Process

The Pee Dee Region includes 13 counties: Chesterfield, Clarendon, Darlington, Dillon, Florence, Georgetown, Horry, Kershaw, Lee, Marion, Marlboro, Sumter, and Williamsburg.

The regional planning team includes three local workforce areas, including 27 representatives from a host of core partners including Adult Education, K-12, Economic Development, Workforce Development, Vocational Rehabilitation and Technical Colleges.

The Pee Dee team began with leadership that was uncertain about the project and the role they were expected to play. In addition, the initial team roster had members with no prior connection, relationship, or history of regional planning. This initial situation meant a slow start for the team, and the facilitator had to spend time explaining the value of regionalism and how this was a new long-term approach to workforce development planning. The team had initial concerns about the time and effort required to support regional planning work.

The team held multiple meetings via conference calls and began working through the process. Multiple team members completed the self-assessment and participated in the March 30-31, 2016 Sector Strategies Regional Planning Institute. While the Pee Dee team attended the Institute in low numbers, the members who did attend connected to the value of the project and made great strides during the meeting.

During the Institute, the team reviewed and discussed the data report provided by Maher & Maher and additional data and information shared by the state. They also explored current sector priorities of Regional Team members and their organizations, and Health Care was selected as the priority sector to complete the planning matrix. The Regional Team also asked for some additional data reports to validate the selection of their priority sector and to determine the Health Care occupations they should focus on. During the Institute, there was a spirit of cooperation and a number of partners put forward draft goals and strategies for all six of the sector strategies planning categories. Overall, the Regional Team was able to build a good base for a strong working relationship and they looked forward to updating the group members who did not attend the Institute.
The Regional Team then reconvened in a meeting on April 14, 2016, with 20 members in attendance. Areatha Clark, team lead, and Paulette Francois, Maher & Maher consultant, led the discussion. An update was provided from the March Sector Strategies Regional Planning Institute. Members who attended shared their experience at the Institute. SWOT analysis results, along with the Regional Sector Strategies and Talent Pipeline Planning Matrix, were reviewed with the group and submitted for approval.

The group also suggested setting up a subcommittee to focus on the primary sector, Healthcare. Additional subcommittees will be created at a later time for Diversified Manufacturing and Hospitality. During the meeting, Maher’s data consultant briefed the team on the Pee Dee Region Industry Clusters report. This was especially valuable to team members who could not attend the Institute. The group approved the recommended targeted industries and indicated interest in additional data requested after the Institute to determine the healthcare occupations they need to validate with employers. The full group agreed that data presented at the Institute will be explored in further detail and updated during upcoming face-to-face meetings.

The team also invited George General, Santee-Lynches LWDA Board Chair and Site Manager for Care South Carolina – a non-profit health and human services provider – representing the Healthcare industry, to share his input on the group’s primary target industry. He indicated that primary care is a large portion of the healthcare industry and that CNAs (in particular), medical assistants, phlebotomist, etc. are in great demand. It was recommended that a needs assessment be completed to determine and understand the workforce needs for this sector. The data being provided must be validated as well by healthcare experts like Mr. General. Mr. General agreed to provide a list of resources that can be contacted to assist with validating the data and further exploring workforce/hiring needs.

Mr. General shared a best practice/strategy currently in place with the local technical colleges and healthcare students. This strategy creates a pipeline of workers. Mr. General also recommended that the group get the K-12 system involved to help promote the healthcare industry on a larger scale. Other occupations to consider in developing this sector are: behavior health technicians, medical billing and coding, and health administration. Mr. General’s presentation assured the team they had made a selection that was validated by the data and by employers in the industry.

The Pee Dee region face-to-face meeting held on May 2nd, 2016 was well-attended and included twenty members who left with a plan and excitement about what they learned was happening in parts of the region that they were previously not aware of, and about how they could bring certain best practices to scale across the region.

During the face-to-face session, Dr. Ron Bartley, President of the Northeastern Technical College, served as a critical champion who advocated for sector-driven regional planning. He...
shared his own experiences and successes with the model and helped the team to focus their priorities. Dr. Bartley will be pivotal to the future development and sustained engagement of the team.

During the face-to-face, the team reviewed the additional data sets requested and the initial planning matrix and made changes and improvements to develop a thoughtful plan to guide their work around healthcare moving forward. While the team is still in the process of fully conforming to this new approach, they have made progress and gained consensus. It is essential that they identify a Core Leadership Team and identify a Chair to maintain progress and focus. Dr. Bartley should be considered as a Chair for the Core Leadership Team. The Pee Dee Regional Team needs to continue diversifying its membership to ensure other key stockholders remain committed long-term. Team development and convening regular face-to-face meetings to strengthen trust and credibility among all the Regional Team members should be continued. Finally, an accountability plan is critical to ensuring that all partners deliver on the commitments for outcomes and timelines outlined in the planning matrix.

2. Target Industries

The Regional Team received and reviewed the Maher data report prior to the SC Institute in March and had many questions during the discussion with the Maher data expert and SC Business intelligence staff at the Institute. After the initial session on day one, the Regional Team members present decided that the following targeted sectors Healthcare (primary), Diversified Manufacturing, and Hospitality (secondary) would be the sectors presented to the larger group for approval. Based on the data contained within the cluster study and additional data provided, the group finalized their targeted industries listed above at the follow-up meetings.

Additional data was requested to identify those in-demand, fastest-growing occupations across the Pee Dee region that the team would review to determine next steps in developing the healthcare strategy. This data was provided to the group as requested and will be utilized for the plan to determine the occupations the region should focus on. Additional assistance may be requested with narrowing down the focus of healthcare occupations.
provided in the data report to enable the team to determine specific occupations to target and begin implementation of specific strategies that will produce outcomes that are realistic and able to be accomplished in a reasonable period of time.

The team determined that healthcare was their primary targeted industry based on the following factors:

- Analysis of the Pee Dee Region data report, which documented significant job growth, occupations that would be attainable by the targeted populations of the agencies, and needs of employers in the region;
- Prevalence of healthcare as a demand industry in all parts of the region. Health care is the only industry with growth in all three local workforce areas. The other industries are more prevalent in some areas than others and are very concentrated in singular parts of the region, e.g. Hospitality;
- Initial validation by healthcare representative on Local Boards;
- Technical colleges’ validation of the demand for healthcare training in the region; and
- All three local workforce areas’ validation of healthcare growth and demand across the region.

The team accorded a lot of weight to the data provided; however, the fact that healthcare growth is expected across all areas in this region was the driving force for the group’s decision. The group also determined the need for a trained workforce to meet the demand and validated the group’s capacity to meet the training needs of regional health care employers, some of whom may not be aware of this capacity. The Pee Dee team wants to position themselves as the “go to” group for employers and job seekers in the region and health care is the industry targeted to be at the front of that effort.

3. Key Goals

The goals of the Pee Dee Region are to:

- **Develop an effective, diverse and sustainable regional team to meet the demands of the growth industries in the region.** The team recognized the challenges in meeting the demands of the health care industry as independent agencies, with no coordinated approach or plan to meet the needs of any other industry in the region. This goal will provide an opportunity for a unified plan and coordinated approach to bring all partners together to develop a unified plan, leverage resources, coordinate services and partner with employers to address their specific workforce and talent development needs.
• **Develop a regional identity that both job seekers and employers identify as the “go to” system for employment and training support.** The group recognized that multiple agencies providing training, business services, and talent development services all market independently and fail to offer job seekers and employers a clear message about what is available across the workforce system. The regional team plans to better coordinate business services and align training and services to position themselves as the “go to” system for employers. This will include unified marketing across the region.

• **Develop a Healthcare Career Pathway tool that allows job seekers to navigate opportunities across the region.** The group recognized that while health care is a high-growth industry in the region, most residents do not have a clear understanding of the career path available in the industry and how to navigate training options across the region. The development of a career pathway tool to help job seekers navigate the system would outline the health care career ladder and guide residents to funding and opportunities across the region and partners. This would increase marketing and opportunity for those new to the workforce and those looking for upward mobility in health care.

4. **Technical Assistance Needs**

   While the Pee Dee Regional Team has developed a plan and they understand the benefits of regional planning, they would benefit from some dedicated time to building an operational structure for the Team. The planning matrix can serve as a great resource in formalizing the Team structure, and it provides key insights regarding potential opportunities for the region. Further progress could be achieved with the support of a facilitator and/or the Core Leadership Team initiating the process. Another approach to tackle this issue is to identify resources that can be dedicated to this work, including staff time and funding. Options include using strategies in the plan to pursue other funding opportunities that support health career development and apprenticeship opportunities. The suggested completion of the health care asset mapping exercise could also bring to light existing resources and tools that could be brought to bear in implementing the plan.

   Much of the Pee Dee Region’s plan is based on business engagement and training around health care. While the workforce system often has a transactional relationship with business as opposed to a structured business engagement strategy, the technical colleges at the table seem to have a structured relationship with health care employers in the region that can be expanded across the region. The group understands that both sector strategies and career pathways development need to be an employer-led effort but could benefit from technical assistance to accelerate their proposed plans. Overall this is a shift in approach that requires technical assistance and support for the region that includes: expansion of best practices identified in the region; strategies for engaging businesses; techniques for sustaining that engagement; best practices around forming and maintaining partnerships; and enhancing skill sets in facilitation and negotiation.
Further, technical assistance around sector and regional planning for boards would be beneficial to clearly define local board roles within this framework. This would facilitate improvement and meaningful board engagement to support this regional effort.

5. Recommendations for Next Steps and Continued Progress

Moving forward, the Pee Dee Regional team needs to take the following actions to execute the vision and goals outlined in their plan:

1. Identify a core leadership team and chair that can lead the regional planning efforts and provide oversight and accountability to sustain the regional planning process, as a core group is needed to drive this effort and set priorities long-term.

2. There is also a need for key business representation and strategic engagement of local board business members on the regional team. While the team has a strong group of partners, employers need to recruited and engaged to better guide the team’s work.

3. There should be a communication plan throughout the region among all the partner groups to ensure the vision and work of the Pee Dee Region is thoroughly understood and embraced region-wide and at all staff levels in each participating organization.

4. Each of the three LWDBs has collaborative efforts going on in their areas. The focus should be on taking the best cross-agency initiatives to scale in the region. This will create committed stockholders in the region and provide opportunities to work collaboratively across partners region-wide. This will also support leveraging and braiding of resources as well as aligning efforts to effectively meet business and individual customer needs.

5. The regional team agreed to a coordinated business services strategy across all partners in the region. This includes business services staff meetings and updating and expanding an existing toolkit to function as a fully regional tool. Based on similar efforts in regions across the country, the Pee Dee Region should explore a unified business services strategy after the foundational work is completed and the group has moved to secondary industries of priority.

6. The regional team should consider expanding sector outcome measures beyond federally-mandated program measures to demonstrate a commitment to meeting measures of value to the healthcare sector. These may include company satisfaction with value received, industry penetration and/or repeat business, reduced turnover, and/or other outcomes. Regional partners should show the business community that the workforce system and its partners are accountable to meeting the unique Health Care sectors need in the region.
7. As the team executes the plan, there will be critical intelligence gathered regarding business needs that will impact the service delivery process for both the individual and business customers. A change management approach like Human Centered Design could serve as an excellent tool to innovate in the cross-agency service delivery system toward a “customer centered” approach. The Human Centered Design model has five steps, which allow staff at all levels of the system, as well as customers, to participate in improving the customers’ experience of and outcomes in the system.

8. Finally, a candid discussion about what each partner needs to remain at the table – and what each will contribute moving forward – is necessary to sustain this work in the future. The Core Leadership should lead that effort by surveying the group regularly and making adjustments to ensure the membership and work is maintained and becomes the new way of doing business in the Pee Dee region. The asset mapping exercise provides a foundation for this effort, and co-investment strategies will be crucial moving forward.
The Upstate Regional Planning Team was formed as a collaborative of partners seeking to align efforts in support of community economic growth and talent pipeline development for key regional industries. Initially led by the four local workforce board administrators of the Upstate Region, a team of partners representing key organizations was developed. Team membership consisted of economic development, K-12 education, DEW, Goodwill of the Upstate and Midlands, Vocational Rehabilitation, Upstate and Central Alliance, both technical colleges, Ten at the Top, and the department of social services. Prior to this talent pipeline initiative, the Upstate Region had a history of collaboration and partnerships across pockets of the region to develop and learn from each other’s best practices in areas such as industry partnerships and unified business service teams. However, the Upstate Regional Planning Team identified during its SWOT (strengths, weaknesses, opportunities, and threats) analysis that while they have strengths from the existing pockets of collaboration within some of the local workforce areas, they would benefit from increasing synergy and alignment among existing collaborations and bringing them to scale uniformly across the region. This new initiative serves as an opportunity to expand foundational collaborations, build models to scale across the region, and strengthen these aspects among all partners within the community who may not have been previously engaged.

In December 2015, some members of the team attended a statewide sector strategies “101” training session, which reviewed foundational elements of regional sectors partnerships and strategies. The Upstate Region then worked one-on-one with its Maher facilitator to continue building out the partner representation on the Regional Planning Team. On March 17th, members of the Regional Planning Team convened in Greenville, South Carolina, for a virtually-facilitated self-assessment and asset mapping session. This session prompted robust dialogue of each partner’s perspective on current sector strategies, along with identification of where existing partnerships are effectively in place.

The team reconvened on March 30-31st, 2016 at the South Carolina Talent Pipeline Project Regional Planning Institute in Columbia. Representatives of the local workforce development system, K-12, Higher Education, Vocational Rehabilitation, Adult Education, Economic
Development, Human Services, local employment services, and community-based organizations, such as Goodwill, came together to assess regional labor market information, identify strengths and areas of opportunity across their region, and complete elements of a regional plan that seeks to capitalize on the region’s competitive advantages.

The Upstate Region moved forward to work on regional plan development, strategically aligning their next planning meeting to coincide with a tour of the Golden Strip Career and Technology Center in Greenville on April 28th, 2016. The meeting also included a special presentation from Michelin North America on their plan to implement a Manufacturing Scholars Program. Combining the planning meetings and site visits is an opportunity to reinforce the Upstate region’s focus on ensuring that plan strategies are industry- and employer-driven. During this meeting, four workgroups were created, which through facilitated activities further developed the goals, strategies, and action steps in these areas:

- Developing a regional data team;
- Identifying and replicating successful industry and educational partnership models;
- Expanding partner representation across the region; and
- Addressing generational factors influencing the workforce.

One of the key decisions made at the April Regional Planning Team meeting was to continue to build a coalition of partners throughout the region, with each local area recruiting the key players within its geographic area. The Upstate Regional team has added additional members to the team representing Adult Education and technical colleges throughout the region. The team is moving forward with planning and holding a regional launch meeting where insight from manufacturers will be collected and analyzed to prioritize goals and action steps that will have maximum impact in providing the industry a pipeline of talent.

In order to capitalize on the momentum, the Regional Planning Team has demonstrated, the group needs to continuously expand the network of partners collaborating on the initiative. Expanding contributing partners can help maintain active engagement of the established team members as they bring newly-introduced partners up to speed on the initiative, while expanding their creative capacity to find solutions to manufacturer’s top needs with the energy and assets new partners bring to the group. The Team must continue to convene regional partners regularly, and make preparations for regional industry listening sessions to ensure the goals and strategies of its draft regional planning matrix align with Upstate manufacturers’ priority talent pipeline development needs.
2. Target Industries

The Upstate Region decided to focus its initial regional sector partnership work on the Diversified Manufacturing cluster. This decision was reached after analyzing the regional labor market information report provided by Maher & Maher. At the statewide Regional Planning Institute in March 2016, the team reviewed the data provided and discussed manufacturing competitive advantages most important for them as a group to focus on. The decision to focus on manufacturing reflected the fact that small partnerships are already present in parts of the region and the team’s desire to bring those to scale across the region. Having a foundation of successful partnerships to analyze and learn from, the team felt their first regional foray into building successful partnerships at scale should focus on what is currently working.

In addition, the team thoroughly reviewed the data provided and realized there were several common factors among industry clusters listed on the bubble chart. The team made the decision to expand the manufacturing cluster to include sub-groups of other industry clusters, such as Business Services, Textiles, IT Manufacturing, Metal Fabricating, Rubber & Chemicals, and Food Processing. While other data sources were not utilized during the Institute discussion, the group used its knowledge of the prevalence of the automotive manufacturing industry within the region to connect that industry to several of the other clusters that are part of the manufacturing supply chain. Clusters such as Business Services provide temporary-to-hire staffing, which directly supports the manufacturing workforce. Manufacturing was thus reclassified as “Diversified Manufacturing,” and Maher & Maher provided revised data reports to reflect all clusters that have been added to this broadened industry category.

3. Key Goals

After completing a self-assessment, asset mapping, SWOT analysis, and three facilitated team planning sessions, the Upstate Regional planning team identified the following key goals, which will address the opportunities and challenges the region faces.
Develop a Data Team across Partners: Prior to this project, there has not been alignment across partners in the types of data, definitions, and key factors used, which was identified as a weakness during the region’s SWOT analysis. A cross-partner, regional data team will help to gather, analyze, and validate workforce data and intelligence across regional partners. This team will be invaluable in identifying the key factors for consideration, informing alignment of regional initiatives around the same priority areas where the region can be most competitive, and helping education and training partners to leverage and integrate their efforts. Once the data team has formed its initial framework and developed consensus on key factors, it will provide recommendations for building the region’s ability to better leverage data in delivering programs that address the needs of job seekers and businesses.

Convene Regional Partners in a Diversified Manufacturing Regional Launch Meeting: The Regional Planning Team prioritized the need to ensure manufacturers’ input on talent development needs drives plan development and implementation moving forward. Directly engaging manufacturers in sessions that focus on listening to their priority areas of need and their preferred methods for working with community partners will ensure that the regional partners’ plans are aligned to focus on key industry pain points. Convening partners regionally as an initial phase of the regional plan will ensure that all partner share the same message from employers. This listening session will provide the foundational industry knowledge each partner needs to effectively adjust plans and identify opportunities to leverage both fiscal and staffing resources to best support a regional strategy for manufacturers. After hearing the feedback from employers on their prioritized needs, the partners will reconvene workgroups to modify goals, strategies, and next steps of the regional planning matrix accordingly.

Align Strategies and Resources to Build Industry Partnerships: Build to scale truly regional industry partnership models that strengthen efforts to develop the skillsets manufacturers need in the talent pipeline. Industry partnerships will also focus on engaging the emerging workforce, parents, teachers, and guidance counselors to build understanding of and market manufacturing career opportunities to the emerging workforce. Work-based learning opportunities, teacher externships, and industry engagement in education are strategies that will help translate the needs and skillsets across partners and generations. Efforts to address generational factors when marketing and training across the four generations currently included in the workforce are being addressed by a workgroup within the regional planning team. The region has identified the Michelin and York educational models as existing industry partnerships that are successfully aligning resources across partners as models to explore and replicate. A workgroup has been formed that will study each model, through site visits and interviews, to identify key elements. The workgroup will continue to document these factors for the larger Regional Planning Team and provide recommendations as next steps are identified in building the models to scale.
• **Align Curriculum around Industry Needs:** Aligning curriculum around the needs of industry was an opportunity commonly voiced across partners during the self-assessment and SWOT analysis activities. Ensuring education programs and curriculum align to the essential and technical skill requirements of jobs Upstate manufacturers are looking for regional talent to fill will provide a more robust talent pipeline for existing and potential employers. Building off the previous goals of developing consensus-based decision making around shared data and aligning strategies and resources to build industry partnerships are key steps to focus industry partnerships on the skill sets industry needs. Likewise, building off these goals, advisory boards and staff for area career centers and technical schools will be better positioned to use shared data sets and other common factors in their decision-making processes. Furthermore, the region seeks to expand industry representatives’ roles on Boards from mere approval authority to a more active role in reviewing and contributing to the creation of curriculum as an essential component of better aligning programming to industry needs. This goal is long-term in nature and continued buy-in to the process across partners is critical for its success.

4. **Team Technical Assistance Needs**

The Upstate Region is preparing to move forward with the goals of its regional planning matrix, which focuses on aligning all relevant partners’ efforts. In order to sustain the project’s momentum and build capacity, the region would benefit from additional technical assistance that aids them in expanding the team, effectively engaging industry, and further building out the regional framework for sector strategies to meet the talent pipeline needs of other competitive sectors in the region in addition to manufacturing.

• The regional team has expressed its need for additional technical assistance in planning and organizing the content and flow of the Regional Launch Meeting to gain maximum insight and needs prioritization from manufacturers, and in facilitating the partners’ discussion portion of the agenda.

• Continuing to build support across the community-based organizations within the Upstate Region is a key goal the planning team has identified. Onboarding new partners in a systematic way will aid the new additions in stepping into the project and immediately contributing. Developing new partner orientation packets will ensure meetings can progress to accomplish outlined objectives without having to completely revisit foundational steps. A new partner onboarding process will also help create a culture where each team member can serve as a knowledgeable representative of the project in community platforms and recruit new members. Onboarding materials and processes should emphasize a common set of talking points and a shared understanding of the project’s history and goals.
• The regional team would like additional support in building out the next steps of their regional plan and framing the team’s activities to align with industry feedback from the Regional Launch Meeting. Such technical assistance may take the form of assisting with developing future planning team meeting, crafting invitations and agendas, and providing event support such as facilitation.

• As the team continues to further develop regional planning matrix action steps, technical assistance support on sustained industry engagement and feedback on objectives, solutions, and outcomes will help ensure the region’s goals and objectives are on target with manufacturer’s talent pipeline needs over time. Such assistance might come in the form of providing frameworks and templates to support industry partnership expansion, critical elements for replicating models as the region builds to scale, and best practices from across the nation.

5. Recommendations for Next Steps and Continued Progress

Through self-assessment, asset mapping, and SWOT analysis activities and participation in three facilitation meetings the Upstate Regional Planning Team has developed an initial regional planning framework and identified goals, strategies, and action steps in its planning matrix. These efforts to date have helped to form a coalition of partners across workforce development, economic development, education and other key community partners. In order to progress to the next level of action planning and to sustain the project over time, the following discussion outlines recommendations to strengthen the regional partnership and ensure that manufacturers’ talent pipeline needs are met moving ahead.

• In order to ensure optimum responsiveness to the needs of manufacturers, the launch meeting should be held by fall of 2016. Holding this meeting prior to the fall will have two objectives: to continue to build on the momentum the partners have created thus far; and to ensure that any goals, objectives, and action steps pursued by the region are based on direct industry feedback on priority needs.

• The regional data team should be established prior to the fall 2016 Regional Launch Meeting to ensure that the team’s knowledge and expertise supports meeting planning, and to enable the team to model data-sharing and consensus-based decision-making for the broader regional partnership group. It is important that data team membership be strong and members well-positioned to support Regional Launch Meeting efforts and use their skill sets to add important value to meeting discussions. Delaying the formation of this team puts the region at risk for losing momentum and may also make reaching consensus on data definitions and key factors a more difficult challenge to overcome.
After holding the Regional Launch Meeting and revisiting regional goals, objectives, and action steps in light of insights shared by the manufacturing industry, the team should reevaluate the four working groups developed at the April 28, 2016 regional team meeting. The working group structure, goals, and future meeting objectives should be aligned as necessary to meet Upstate manufacturers’ prioritized goals.

The beginning stages of this regional collaborative have focused on building a strong foundation of diverse community partnerships and planning to implement goals supported by data, promising practices, and industry feedback. As the team moves forward, work on the regional planning matrix should transition to defining concrete action steps. These steps should focus on replicating models of industry partnerships in areas of the region where they currently do not exist to take to scale efforts to build the talent pipeline for diversified manufacturers.

To date, the Upstate Regional Planning Team has made great strides in recruiting an inclusive range of community partners from across the region, but failure to continue making progress on plan action steps will put the region at risk for losing the momentum it has worked so hard to create. Specifically, current action steps of planning the Regional Launch Meeting and scheduling the next site visit to review the York education model need to be put into motion. Hearing from manufacturing representatives at the Launch meeting will provide the region with direct feedback to assist it developing more detailed action steps to expand manufacturing industry partnerships and take them to scale region-wide, such as operationalizing manufacturing sector strategies in employer and job seeker service delivery. As important will be a focus on supporting the sustainability of manufacturing sector initiatives and using evaluation and industry feedback to drive continuous improvement and communicate lessons learned. All of these areas are essential to the region having the partnerships, framework, knowledge, and skill sets to replicate sector-based initiatives across other industry sectors in which the Upstate Region has competitive advantage.
IV. Statewide Recommendations

A. INTRODUCTION

The foundation for sector strategies has been established. Most importantly, regional teams have successfully formed (even if some still require additional representation), and each has completed a plan matrix that puts it on a firm path to implementation. Recommendations specific to each region are included in each regional narrative in Part III but, as in any statewide rollout, it is absolutely essential that guidance, support, technical assistance and encouragement, *unified and coming from all relevant state departments*, be presented to the regions. This is especially the case in South Carolina where so many positive influences and initiatives are being brought to bear on the talent development issue, and all need to be tied together for maximum impact.

The state therefore needs to take a prominent, planned and productive role in helping regions connect the dots and implement sector strategies in support of overall talent pipeline development. Following are two major sets of recommendations to help the state accomplish this. The first consists of overarching recommendations that require significantly enhanced and expanded collaboration among state agencies – and the private sector representatives on the Leadership Team who need to hold the public sector accountable for its responsibilities – over that demonstrated occurring in this initial project. The second consists of more specific recommendations that are organized into three distinct “chunks”, though each is mutually supportive of the other.

We cannot emphasize enough the importance of these recommendations. Regional representatives have worked very conscientiously thus far and, while they recognize what they are doing will change the way they do business, they are currently continuing to operate their programs while working to build this foundation and move forward. Unified, strong leadership from the state – and influence from the private sector -- is essential to ensure that this momentum is maintained. As state level and private sector leadership is expressed, so will leadership continue to emerge at the critical regional level.

Ensuring that all local agencies and schools receive the same messaging around sector strategies and career pathways is so important that we are recommending joint State issuances of policy, guidance and support.
B. OVERARCHING STATEWIDE RECOMMENDATIONS and DISCUSSION

1. At the state level, enhance and make more consistent “horizontal” collaboration, communications, and integration among all talent development partners. Fully engage these partners to ensure that sector-focused strategies are truly shared priorities, rather than primarily the work of a single state agency.

As the state expands its vision and implements a broader talent development system that encompasses not only sector strategies, but also the various career pathway initiatives, including but not limited to H. 4145 (S.C. Workforce Development Act) and the S.C. Department of Education YES (Youth, Education, and Skills) grant, it is strongly recommended that:

- The heads of the four state departments – in essence, the four co-chairs of the Leadership Team – formally meet quarterly, in order to ensure that everything possible is being done to rationalize and connect the various talent development initiatives. This group should also hear from the working group discussed immediately below on the status of regional implementation and delivery of technical assistance and training related to sector strategies, and should establish a regular process for communicating with that group.

- The top executive of each of the four state departments should appoint a high-level manager to meet at a minimum every month to collaborate on this “working group.” The objective is to receive regular updates from the regions on progress, challenges and needs, and to meet those needs.

2. Just as communication across agencies is essential, the need to Improve communications, knowledge-building, and empowerment “vertically” throughout each talent development partner’s organization, from the top of the organization to the front-line service delivery level, is critical. Individuals at all levels of partners’ organizations need to understand the focus on industry sector strategies and how that focus may fundamentally change their work and enhance their customers’ outcomes. They also need to be clearly empowered and supported in implementing sector strategies and career pathways.

Communication throughout all levels of talent development partners’ systems is critical to ensuring that industry sector and related career pathways efforts are embedded in operations and service delivery. Executives and managers in each partner system should be sharing and imparting the same messages, guidance, and support throughout their organizations as regional teams move into executing on their plans.
Because sector strategies require all aspects of the talent development system to work in new ways, all partner systems may also need to prioritize staff knowledge development and training. Partners should be prepared to invest in the skill development and capacity building that will be required for their systems to implement sector-driven priorities.

The group of Leadership Team co-chairs and the managers’ working group described in #1, above, should be charged with developing shared messaging and communication strategies that all partner organizations can implement. The managers’ working group will be essential in identifying and aggregating training and development needs. The four Department heads (meeting quarterly and constituting the Leadership Team co-chairs’ group) will then need to make decisions around shared capacity development priorities and investments throughout the broad talent development system.

3. **All state talent development partners should encourage and embed the sector strategies and career pathways focus in their agencies by exercising policy, funding, and other levers. The goal here is to incentivize and support sector-driven talent development models as standard practice across all system partners. Examples should include:**

- Issuing joint policy among all key partner systems, or, at a minimum, ensuring that all key partners are collaborating on uniform policy development;
- Prioritizing industry sector and career pathways strategies in funding opportunities for regions;
- Tying performance awards or other kinds of recognition to implementation of sector and pathways strategies;
- Incorporating the focus on sectors and pathways into Career Center certification standards and measures;
- Developing indicators for high-impact workforce development boards that require a strategic leadership focus on industry sector and career pathways work;
- Where appropriate, building a focus on industry sector strategies and career pathways into program assessment and evaluation criteria and activities; and
- Providing operational/service delivery guidance that instructs on how sectors and pathways should be incorporated and reflected.

4. **Review Leadership Team roster and individual members’ preferences to ensure necessary representation and validate participation. The Leadership Team should then review and refine its vision for talent pipeline development to ensure it still meets the needs for South Carolina.**

The current Leadership Team only “signed on” to guide this initial project. As the state moves to implementation, conditions have come into sharper focus and it is necessary to reconstitute the Team, for the following purposes:
• To ensure strong representation from employer leaders in each of the statewide focus industry sectors chosen in the current project;
• To review the Team’s initial talent pipeline vision, which was necessarily broad due to impending introduction of regionalism, sectors, etc., and revise/Refine it to ensure it provides clear guidance to all collaborators going forward; and
• To validate the continued interest and participation of current members due to the new supports they are being asked to provide.

All of the above bullets, and virtually all of the specific recommendations that follow, are designed not only to advance sector strategy development; in fact, they all impact positively on the “marriage” of career pathways and sector strategies. It is at that level that work is really carried out to solve employer and job seeker challenges.

The development and implementation of career pathways within the industry sector strategies framework is a key next step for regional teams. State partners should consider what they can do to support and advance regions’ career pathways work. While the state’s role is supportive and, in the end, regional teams and strategies are likely to be led most closely and clearly by regional employers, there are many examples of state support that may be offered, though details are still to be worked out as the State moves forward:

• Create model CPs designed to “jump-start” and assist the regions’ ultimate implementation of career pathways within their target industry sectors;
• Collaborate with the S.C. Department of Education and S.C. Technical College System leaders in efforts to identify key career pathways in a few common statewide industry sectors, using data and validating initial pathways with state industry partners;
• Work to ensure that CPs already developed, whether by businesses, industry groups, technical colleges or elsewhere, are unearthed and leveraged to the extent they have value.

It is up to the public sector institutions and private training providers to create and connect the training and education needed to fulfill the needs that employers articulate as they lead the way by defining the career ladders and lattices that constitute the career pathways. Therefore, state level agencies should work diligently to create collaborative processes that ensure that technical colleges and other institutions share their curricula and other resources to advance achievement in the regions and throughout the state. Private sector leaders need to stay in contact with educators to ensure that this materializes.

The matrix on the following pages summarizes the recommendations for quick reference.
### C. RECOMMENDATIONS SUMMARY MATRIX

<table>
<thead>
<tr>
<th>Recommendation “Area”</th>
<th>Statewide</th>
<th>Regional</th>
</tr>
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</table>
| **Overarching/State Leadership Issues** | • Emphasis on accountability and support, specifically private sector members supporting state agencies and holding them accountable, and state agencies holding local agents accountable  
• Significant changes/additions to horizontal and vertical integration, communication and policy guidance throughout talent development system  
• Embedding of sectors and pathways in policy, funding, performance, etc.  
• Review Leadership Team (LT) roster and vision for talent pipeline development  
• Curriculum sharing throughout the state  
• Special state role in career pathways’ linkage to sector strategies | • Guidance and support flow downward; accountability flows upward  
• Career pathways concerns are addressed throughout all major areas of recommendations at the statewide level, and all should benefit the regions. |
| **A. Building Data Processes and Capacity** | | |
| 1. Reconvene State Team and Convene and facilitate Regional Data Teams | Find ways and means of integrating all statewide data needs related to building the talent pipeline, including K-12 Pathways project | Integrated support is provided to regional data teams in their formation and responsibilities for producing needed data |
| 2. Analytics | • Create system for replicating supply/demand analysis  
• Analyze “performance” (extent of training related employment) statewide  
• Additional data dives provided | • Demand/supply gap analysis in each region; regions trained in completing gap analyses going forward  
• Analyze “performance” in each region  
• Additional data dives requested |
| 3. Ensure that all partner staff fully understand and can utilize the demand-driven approach to career pathway development | Provide training to regional data teams and all partner staff in:  
• Understanding the connection between cluster data and career pathways  
• How to use labor market information to motivate and guide career seekers. | • Understanding the connection between cluster data and career pathways  
• Training in how to use labor market information to motivate and guide career seekers. |
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<thead>
<tr>
<th>Recommendation “Area”</th>
<th>Statewide</th>
<th>Regional</th>
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<tbody>
<tr>
<td><strong>B. Business Engagement</strong></td>
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</table>
| 1. Unified Business Services Teams (BST) | Develop a statewide unified business services strategy and framework to support unified regional teams’ service delivery to employers | • Develop Unified Regional Business Service Teams across agencies and WF areas, and staff based on competencies needed.  
• Emphasize coordinated/unified outreach, solution creation and service delivery  
• Create “one knock” approach |
| 2. Unified Customer Relations Management (CRM) system | • Short term: Develop a shared database to input findings from company visits  
• Longer Term: Investigate and procure an automated system to serve all regions | • Fully utilize shared database  
• Provide input to state on system needs; then fully utilize automated system |
| 3. Unified Training and Coaching | • Provide Unified Business Services training – 4-phase approach; vendor options available from consultant  
• Emphasis on work-based training solutions | • Advise state on regional training needs  
• Fully trained Unified Regional Business Service Teams |
| **C. Operationalizing Sector Strategies and Career Pathways in and Around Career Centers** |           |          |
| 1. Career pathways | Modeling, management and staff training, in mapping career pathways in key sectors | Aligned training, investments, and operations according to sector partnership decisions |
| 2. Training needs assessment | Design and deploy assessment; analyze results | Participate in design, and complete assessment |
| 3. Career center organization | Provide clear guidance as to organizing the region and SC Works Centers | Reorganize SC Works Centers for delivering on Sectors and Pathways |
| 4. Deliver customized technical assistance as indicated by each specific region’s needs | May include coaching regional teams and their leaders through completion of a “kickoff meeting” with one industry sector | Hold initial kickoff meeting in one sector |
D. SPECIFIC STATEWIDE RECOMMENDATIONS

These are divided into three specific categories:

- Building data capacity
- Business engagement
- Operationalizing Sector Strategies/Career Pathways

1. Need to Build Data Processes and Capacity

a. Re convene State Data Team, to

   - Find ways and means of integrating all statewide data needs related to building the talent pipeline, and deciding on a common language and continuous identification of focus industries for all to “aim at”

   - Provide integrated support to the regional data teams

The state data team is already planning to reconvene, and there are many potential benefits from doing so, including:

- There are numerous programs, activities and training and education resources that are closely related to talent development within the state but which are not specifically represented on the statewide data team. These activities need to be accounted for; their resources factored in; and their administrators advised of the potential for their customers’ enhanced benefits by collaborating with the sectors/pathways effort, perhaps beginning with the data team.

- Data team members from different agencies, and therefore operating from different perspectives, made a great deal of progress in rationalizing their various needs. However, there is much more to be done in terms of everaging data and information from all partners.

- The team should decide how often to revisit identification of the statewide target industries.

- Regional data teams may need support in organizing themselves, and will need it to fill in data gaps where regional information may not be readily available; for example, where economic development alliances might not exactly coincide with the regional configuration, assistance from the state team would likely be helpful.
b. **Provide additional data to regions**, including

- Prepare detailed demand/supply gap analyses of target sectors in each of the regions, working specifically with the S.C. Department of Education, the State Technical College System and the education liaisons in Commerce
- Analyze “performance” in relation to training/education received vs. general entered employments to create a baseline from which to assess some of the outcomes of implementation
- Additional data reports that meet needs as articulated by regions

One of the important ways that data can assist in filling employment gaps AND guiding career seekers in positive directions is through the completion of gap analyses. These can be done in the context of near, medium or long-term time horizons, but each would measure the “gap” between the number of jobs employers feel need to be filled in a particular industry sector, cluster or occupation with the number of individuals expected to “graduate” from whatever level and type of education or training is required by the demand side. It is very important that state team members work together to provide initial gap analyses in critical areas for each of the regions; and then ensure that regional teams know how to complete them going forward.

A twin outcome sought by sector strategies is that training/education needs to be provided in areas in distinct demand by employers, and that career/job-seekers find jobs in areas for which they are trained/educated. The data team should act now to create a baseline of information on this and a method of measurement going forward, so that this key aspect can be evaluated after implementation.

In collaborating on data at the regional level, regional teams will no doubt uncover data needs it is unable to meet without state-level assistance. The state team should fulfill those needs and advise the regional teams on how to replicate production of the information in the future.

c. **Ensure that all partner staff fully understand and can utilize the demand-driven approach to career pathway development introduced in the data reports produced in this project.** This can be accomplished through providing training to all regional partner staff, in:

- Understanding the connection between industry cluster data and career pathways both within and across clusters; and
- How to use labor market information to motivate and guide career seekers.

A critical goal of analyzing industry cluster data is to begin to understand career pathway progressions as they exist both within and across clusters. By leveraging a
variety of cluster data, regional partners can begin to see the occupational and skill connections, and therefore opportunities, that exist, often crossing seemingly disparate industries – ultimately enabling the development of needed education and training at greater scale. Once initial pathways have been identified through data, they are then validated and refined with employers. This is a novel approach to the demand-driven development of career pathways, which are more frequently mapped using supply-side information, typically information about existing educational programs and talent pools. Given that many regional stakeholders will not be familiar with the approach, the data involved, and the process, we recommend that regional partners be provided training to build capacity in this area moving forward.

A main purpose for mapping career pathways and identifying their education, skill, credential, and experience requirements is to enhance data-driven career coaching support for students, job seekers, and workers. Business-serving staff often have facility and experience analyzing and integrating labor market information in their work with companies, while those interfacing primarily with workforce supply are not as comfortable or proficient. We therefore recommend that regional partners, particularly those that serve job seekers, receive training in how to use labor market information, industry data, and career pathways information in their career advising work. Job seekers and other talent pools need to understand, and be motivated toward, real career advancement opportunities as they actually exist in their own regions. Ensuring that partners in South Carolina understand their regional economies and are skilled at using data and other information to guide customers about careers in those economies is central to implementation-level success moving forward.

2. Business Engagement

INTRODUCTION

Changing labor markets and advances in technology have revolutionized how businesses find talent and jobseekers look for work. Social media, online talent platforms, and professional networking sites are evolving dramatically, perpetuating the shift in labor market dynamics. Additionally, rising consumer expectations and global competition have transformed how business is conducted in most industries. Employers must move faster and more efficiently to be able to stay ahead of (or at least keep up with) competitors. This development makes it imperative for the public workforce system to continuously adapt and reframe strategies and policies designed to support employers and job seekers. When it comes to employers in particular, just being responsive to their individual needs is no longer sufficient.
In the purely demand-driven system for which we are striving, sector strategies seek to identify customized solutions to the workforce and talent development needs of employers in a particular industry (or cluster of industries). In order to effectively implement such strategies, it is necessary to move from a transaction-based system whereby each agency operates its own business services function, to a unified structure and process of proactive, ongoing, transparent, and effective business engagement orchestrated by a collaborative of talent development agencies. Therefore, statewide business services policies and processes must be designed:

- Collaboratively by all partners (minimum of WIOA and Wagner-Peyser, technical colleges, K-12, and Economic Development); i.e., not siloed or program/funding-driven, but rather the result of aligned and integrated programs, resources and agencies seeking to generate holistic, efficient solutions;
- In such a way that they evidence a thorough understanding of employer needs and expectations; and
- So that they inspire and encourage employer involvement with the public workforce system, and build authentic relationships and trust; minimize the burden on employers and maximize return on their time and resource investments; and deliver consistently exceptional service.

"The goal of a business engagement program is that the workforce system is so important to the business community that they cannot imagine doing business without the workforce system as a partner, and they turn to the workforce system whenever they have talent management or other workforce-related needs."¹

In order to accomplish this, South Carolina must strengthen existing frameworks and further develop unified approaches and processes for organizing and delivering services to employers. This should, at a minimum, include the following components.

a) Unified State and Regional Business Services Teams

The unified state business services team ("state team") should be comprised of state-level leaders of the various public entities and partners listed above that advise and oversee regional and local business services staff, as well as leading employers from the statewide targeted industries, at least on an as-needed basis. The State Team should not

be involved in the operations of fulfilling employer human resource needs. The team should:

- Operate under the guidance of the state’s highest authority on economic development
- Promote a unified business services mission and vision across the state and across agencies and systems
- Provide cohesive direction and guidance regarding general issues and trends identified within major target industries
- Assist regions with the coordination of large-scale employer needs, especially those that cross regional lines

It is imperative that the state team vigorously promote the transition from a model in which employers are considered customers to one where employers are active partners whose workforce and education needs drive public system goals and strategies. This requires that the state team exemplify and model a public/private collaboration based on sustained, trusting relationships and transparent communication and information exchange. That exchange must extend “down” throughout the system to benefit regional teams and customers – not just remain at the state level. Partners’ strategic plans and funding investments must reflect shared goals and “targets”. This means coordinating, connecting, and aligning all business services-related state grants, programs, and assets in support of solutions-based, industry-wide service offerings and delivery, and actively supporting regions in doing the same.

The state team should generally not have an active role in direct employer engagement (for workforce development purposes). This role must be reserved to the regional business services teams, except where an advisory/coordinating role is required due to employer needs being inter-regional or even statewide. As an example, a large business that operates statewide may certainly be engaged by the state team, which then communicates needs to the appropriate regional teams.

Unified Regional Business Services teams (“regional teams”) should be comprised of front line agents from the same entities represented on the state team and include additional local partners who may not have statewide representation but may contribute on the regional level. The team must consist of well-trained staff who:

- Have extensive experience in dealing with businesses/employers (This is critical!)
- Understand the concepts of sector strategies, career pathways, and talent pipelines
- Have a vested interest in supporting the statewide mission and vision for unified business services
- Are cross-trained on the basic services, requirements, and operations of all partners
- Come together regularly to exchange information
Depending on critical mass and regional priorities, it would be ideal to develop sector-specific business service teams or at least individual sector experts. This would provide partners as well as businesses with a consistent single point of contact as a connection point to the array of regional talent development resources.

Teams must transition from being localized, single-agency, and “menu-based” to a cohesive regional unit, regardless of program, funding stream, or organization from which staff members may originate. Most importantly:

- Teams must ensure that roles and expectations are clearly defined to ensure that businesses are not burdened with repetitive identical inquiries, requests, or offerings while still meeting each partner’s need for information, documentation, and feedback (“one knock approach”).
- Outreach must be designed and coordinated collectively to deliver customized solutions to employers.
- Outreach personnel from each institution or agency must be well-versed in the capabilities of the entire system, and must be able to broker relationships among the parties to bring needed services to bear, whether needs are immediate or longer term, as in building a talent pipeline for an industry.

Each region must decide which entity is most suited to coordinate/lead team activities. Responsibility for contacting employers falls to all team members, but functions such as facilitating information exchange, establishing the strategy for engagement, managing both virtual and in-person contacts, and calling team meetings should be vested in one individual. The team may consider whether the coordination/leadership role should be rotated periodically among its members, as this type of organization promotes fuller buy-in and mutual responsibility among all partners.

b) **Unified Customer Relations Management System**

Consistently implementing the “one knock” approach may be one of the most difficult tasks in business engagement. Regional team members must be on constant alert regarding business needs, maintain track of contacts made, services provided and outcomes. At the same time, it must be ensured that businesses are contacted by as few front line agents as possible, but as efficiently as possible, in order to minimize the burden on employers and maximize return on their time and investments.

Therefore, it is essential that a statewide, unified, real-time Customer Relations Management (CRM) system, to which all state and regional partners have read/write access, be investigated and acquired. This will facilitate efficient communication, maximize productivity, and establish reliable record-keeping and reporting capabilities among partners. The need for a similar system was also recognized by the **One Region**.
Global Competitiveness Strategy, which recommends to “[e]stablish a shared database to input findings from company visits.”

The One Region Global Competitiveness Strategy also suggests “[c]reating a regional business retention team brand and website, such as Richmond’s Business First Program and to “[u]pdate regional and county economic development websites and marketing materials to showcase...high impact clusters and the assets available.” These recommendations align with the goals herein and should be expanded statewide.

c) Unified Regional Training and Coaching Activities

“States must remember that changing from a collection of programs delivered in silos to an integrated system characterized by exchange of information across all programs to support real-time decision making by customers and staff can seem like a seismic disruption to staff who may have spent years doing their jobs in the old system. A rigorous and sometimes extended program of cross-training is required.”

It is recommended that each region, with the support of the unified state business services team, implement a phased approach for comprehensive, unified, and universal regional business services team training.

Phase I should lay the groundwork for teams by promoting the common vision for sector strategies and talent pipelines, rolling out the overarching themes of each region’s sector strategy framework, and outlining the roles of each individual agency and partner. This training should also include an honest assessment of possible challenges and demands in regard to operating regionally and across agencies, proposed solutions, and a discussion of the supports needed from state and regional leaders.

Phase II should include comprehensive training on new policies and procedures based on regional sector strategy frameworks and plans. The goal is to communicate to business services teams how to collaborate across systems to create solutions to specific employer challenges in a sector-based framework. For business services teams, this training phase must, at a minimum, include components of customer-oriented selling, transformational leadership, lean management, and customer-centered design. Training programs must include cross-training on the basic requirements and operations of all partners, and instruction on the processes by which regional business services

teams are to communicate with job seeker service delivery staff, which is vital in order to integrate workforce supply and demand intelligence.

**Phase III** should offer technical assistance and training to regional business services teams specific to the expansion of work-based learning programs. Regions must make these services central features of solutions.

- Transitional Jobs
- Work Experience/Internship
- On-the-job Training (OJT)
- Customized Training
- Incumbent Worker Training (IWT)
- Registered Apprenticeship

**Phase IV** should include training on topics identified as challenging during Phases I – III. This may include special issues such as the importance of social media tools for improving engagement with and services to business. We recommend that all business services staff be trained in the use of social media tools. Jeanne Meister explains it best in her article *Social Media Training Is Now Mandatory: Five Ways To Make Sure Your Company Does It Right*:

“Social media training is quickly becoming mandatory for an ever-growing range of companies, far surpassing the first wave of IT firms that rolled it out two years ago, like Dell, Intel and IBM. While it began as an added ‘bonus’ in the arsenal of the marketing spokesperson, now companies ranging from Unisys, PepsiCo, Adidas, HP and Sprint are making social not only part of the company’s core training curriculum, but also a key element in their recruiting message, stressing the employee benefit of receiving social media literacy training.”


3. **Operationalizing Sector Strategies and Career Pathways**

   a. **Provide modeling and management and staff training in mapping career pathways in key sectors and aligning training, investments, and operations accordingly**

   Please also see final discussion in Part IV, B under “Overarching Statewide Recommendations”.
As crucial as the work is, mapping career pathways using data and validating and refining pathways with employers remains theoretical until regional partners then examine – and act on – those pathways in the context of their own actual environments. Partners need to examine their regional education and training, service investments, available credentials, and staffing and service delivery practices in light of pathways to identify areas of alignment and mismatch. Partners also need to assess how well their education and training delivery methods align with employers’ needs and preferences. For example, are educational institutions providing training for a particular occupational area that is largely classroom-based, when employers have stated a clear preference for work-based training? Staffing and staff organization and customer and service delivery flows also need to be reviewed to determine the extent to which they are supporting employer-validated pathways and individuals’ entry into and movement along pathways.

Conducting this analysis is central to actually operationalizing career pathways “on the ground,” and doing so may require regional partners to make significant changes to existing training and education programs, investment strategies, staffing, and service delivery. Providing training for regions in these various areas at both management and staff levels will ensure that partners are positioned to take career pathways from the conceptual stage to operational.

b. **Administer and compile a universal self-assessment of staff training needs relative to sector strategies and unified business services**

As in many professions, services advocated for and/or delivered are not always observed within the profession itself, and so it is with workforce development. The lack of staff development and training throughout the system, but especially at the service delivery level, has been a major shortcoming in recent years. Job counseling, business services “customer-oriented selling”, and using online career development tools are only a few of the basic skills in which talent development personnel need to be fully versed.

The advent of sector strategies and career pathways only accentuates and expands this need. In order to ensure that regional staff have the skills they need, it is strongly recommended that the state initiate a full assessment of training needs, built around a self-assessment administered to all staff, but customized for the general level and type of job each is doing. Training needs may then be prioritized and met, as resources allow.
c. Provide clear guidance as to organizing the region and SC Works Centers for delivering on Sector Strategies/Career Pathways. Such guidance might include the following:

- White paper stating principles of integrated management
- Commitment of the State WDB and its member officials (partner department heads) to send the appropriate messages and put into effect the needed changes throughout their systems
- Technical assistance and training, as needed.

A major portion of implementing sector strategies will be to alter customer service delivery content and flow. This will necessarily require significant administrative and even physical changes in and around SC Works Centers. Consequently, management functions and responsibilities may change among the partners at the local and regional levels. It will be necessary for the state to issue policy guidance and provide technical assistance in what these changes should look like, being ever mindful that they should be driven solely by the needs of both system customers.

Further, when done right, career center organization, partnerships, customer flow, and service planning and delivery are all influenced by the intelligence obtained through target industry partners. For example:

- A sector-focused Center will have career coaches who are experts in the workforce needs of one or more target sectors.
- Staff assisting job seekers are not case managers but actually true career development coaches, capable of advising customers about regional labor market opportunities, using labor market information and other intelligence, and linking training to growth occupations in target sectors.
- Industry sector specialists serving job seekers and workers may also specialize in the same sectors, or at least actively collaborate with business services staff to share intelligence and connect supply and demand needs.
- Center outreach and education materials, such as industry and occupational profiles, convey opportunities about career pathways in target sectors.
- Assessment is tied to the identified skill needs of employers in target sectors, and other career center services, such as workshops and networking groups, may be organized by industry sector. Broadly speaking, the focus is shifted from job placement in any sector to career development along clear pathways to and in vital industry sectors.
d. **Pick up with regional teams wherever each is, and continue team and plan development, pushing for engaging employers in initial sector as soon as each is ready**

It is to be expected that extensive “state to region” technical assistance customized to each region will be necessary. Not only are some of the region-specific needs listed in Part III significant, but there will surely be additional areas of need coming to light as implementation continues. The state work team (see “overarching Statewide Recommendations, #1, above) must be empowered and enabled to respond to those needs.

As regions move toward convening their initial sector “kickoffs”, it is likely that some will be requesting assistance in planning and facilitating those meetings. The state should be prepared to do so, being careful to hand responsibility back to the region when the initial meeting is completed.
Appendix A: South Carolina Talent Pipeline Project LEADERSHIP TEAM CHARTER

I. VISION

South Carolina will have a talent development system that supports strong regional economies by aligning the resources of all partners, public and private, toward developing a workforce supply chain that enhances development of consensus-based targeted industry sectors and creates meaningful career pathways for a range of workers and skill levels in important regional industries. The system will be characterized by a sustained, trusted relationship among the workforce system, education, economic development, and industry.

This initiative will survey the workforce development needs of the State; be data driven; and guided by business and industry. The focus will be to integrate the services and programs of the education, workforce, and economic development partners across organizational silos to prepare job seekers for careers in high demand fields and fill critical need positions in businesses and industries. This can be done by developing a pathways program to facilitate a seamless transition both within and from education to employment in businesses and industries with critical workforce shortages.

Success will be measured by developing accountability measures and key performance indicators in terms of ongoing processes that ensure alignment of resources to common talent development goals.

II. PROJECT MISSION

To facilitate the interdisciplinary public/private sector statewide and regional project teams through a process that will plan for, build, begin to implement, and provide for sustaining a talent development system built on defining talent pipeline needs at the regional level. This involves building support for transformative system change, and providing venues, processes, best practices, and tools that enable the project team to embark on achieving the State’s vision. The project will seek to ensure that:

- Local public and private stakeholders partner and provide leadership to formulate comprehensive data-based regional workforce and economic development strategies;

- Local WDBs, administrative areas, economic development entities, technical/community colleges and public education systems collaborate, as a team, with critical industry employers to plan regionally and deliver services efficiently and effectively; and

- Strategic and operational aspects continuously interact to adjust to changing conditions in building regional talent pipelines, addressing skill gaps, and creating meaningful career pathways for a range of workers and skill levels in important regional industries.
The Workforce Leadership team will ensure that the following success factors are adhered to throughout the process:

- Target industry sectors are identified using real-time data
- Sectors are selected by regional consensus, but based on data
- Processes are established to ensure that employers’ assessed talent needs are clear
- Partners’ plans and organizations are aligned to support sectors
- Education and training programs and curricula are aligned to criteria in the proviso and utilized in order to meet identified talent pipeline needs, including but not limited to:
  - Increase pathways to coursework, equipment, and facilities
  - Utilize Education & Economic Development Act (EEDA)
  - Dual credit courses
  - Adult education programs
  - Career and Technology courses and programs
  - Apprenticeship and Youth Apprenticeship
  - Enhance existing or create new training programs in all regions of SC
- Business services are aligned to sector strategies

III. PROJECT CONTEXT

A number of factors have led South Carolina to move to adopt an integrated approach to talent pipeline development:

- Governor Haley has declared workforce a “top priority”.
- Proviso 117.127 requires that a plan be developed to address the workforce skill shortage in high-growth industries through the collaborative efforts of SC Department of Education, SC Department of Commerce, the SC Technical College System and the SC Department of Employment and Workforce.
- South Carolina continues to recruit new businesses and see expansions in existing industries at a high rate, and clear State goals include addressing 70,000 unfilled jobs in the short term, and providing a highly skilled workforce to new and existing employers in the longer term.
- In these contexts, many areas in the State have experienced and/or recognized the potential for significantly enhanced outcomes when employing sector strategies. It is time to provide the supports and incentives that will enable and empower workforce areas and regions to bring those activities to scale and deal with new economic realities.
- Passage of the WIOA Federal legislation, which incentivizes and otherwise encourages adoption of an integrated approach to sector strategies, and also requires regional workforce planning, the data-based foundation for a “sectors” approach.
- Over half the states were exploring or implementing sector strategies even before passage of WIOA, making the model the most consistently adopted approach to meeting businesses’
needs for skilled workers and workers’ needs for good jobs. Sector strategies are among the few workforce solutions that statistical evidence shows to improve employment opportunities for workers and to increase their wages once on the job.

IV. LEADERSHIP TEAM STRUCTURE and ROLES

The overall Leadership Team structure and change management process is described through a series of roles and responsibilities designed to foster consensus, collaboration, and implementation.

The **LEADERSHIP TEAM** is co-chaired by the SC Departments of Commerce, Education, Employment & Workforce, and the SC State Technical College System. The **CO-CHAIRS** are responsible for:

- Supporting and guiding the work of the SC Workforce Leadership Team and regional teams.
- Providing leadership, guidance, access to information, and timely feedback.
- Serving as champions for an integrated statewide workforce development plan and implementation.
- Addressing roadblocks and process obstacles that cannot otherwise be resolved.

The **LEADERSHIP TEAM** is comprised of key executives and staff of the agencies involved in the South Carolina workforce development system; other public and educational stakeholder representatives from the state, regional, and local levels; and business and industry representatives, including and
especially those from likely targeted industry sectors. Their role is to provide leadership – to contribute social, political and intellectual power as leaders and stockholders in the state’s broader Talent Development system. As such, the Leadership Team will:

- Become fully oriented to the Team process
- Adopt Project Vision and Mission Statements as part of the Team Charter
- Promote the talent development concepts and processes throughout workforce and related systems
- Build consensus on the statewide target industry sectors
- Identify critical issues to be explored during the Regional Institute
- Promote the Regional Institute, ensuring the appropriate level of participation in those sessions
- Receive, review, and refine the Team Facilitator’s recommendations
- Work collaboratively, in an integrated fashion, to ensure that the talent pipeline process is fully developed
- Ensure that the State’s vision and the Project mission are adopted by all partners as policy, and foster concurrence within the partner communities, including and especially the technical/community college, K-12, economic development and local workforce development systems

In order to ensure that all partners’ data efforts are fully leveraged, and that the entire project team is operating from the same information, the Leadership Team will establish a “Data Team” compromised of representatives from all statewide partners that maintain business intelligence staff.

The PROJECT CONVENER is the Executive Director of DEW and is responsible for appointing a Single Point of Contact (SPOC) for the Team, who will coordinate project logistics and day-to-day communications along with Maher’s Project Manager.

REGIONAL WORKFORCE PLANNING and IMPLEMENTATION TEAMS will be comprised according to guidelines issued by the Co-Chairs. These teams will participate in a self-assessment exercise designed to help determine each region’s readiness to undertake a sector strategy approach; will attend the Regional Institute and be responsible for planning activities there and afterward; and generally advocate for and lead the development of sector strategies and integrated services in each region.

Each regional team should include representatives of:

- Workforce Development entities
- Technical/Community Colleges
- Economic Development entities, including Regional Workforce Advisors
- K-12 Education
- Adult Education Centers
- Business representatives, especially those from likely targeted industry sectors
- Other stakeholders TBD
The **PROJECT FACILITATORS and MANAGERS** will partner with the Co-Chairs, Leadership Team and Regional Teams to ensure project success. Maher & Maher will facilitate project events, including Leadership Team meetings, Sector Strategies 101, the Regional Institute, and related activities. Maher will also provide on-going subject matter expertise to the project. The Project Facilitators will:

- Provide full project management services, from the beginning of the project through completion and State acceptance of the final report, including maintenance of a project collaborative workspace;
- Facilitate key Leadership Team and other meetings;
- Provide ongoing support to the overall project team;
- Prepare data reports to identify statewide and regional sectors
- Develop, populate, and deploy the project website
- Develop materials for and facilitate the various meetings, Regional Institute, and Sector Strategies 101 course; and
- Prepare a final report, as described under “Deliverables” section, below.

### V. DELIVERABLES

- Various meetings, virtual and on-site, to assist in building the State’s talent development framework and processes
- Sector Strategies 101 Orientation Seminar – Delivered once in person and then customized and adapted for web presentation
- Data Report to ID statewide sectors – Subsequent on-the-ground validation by Leadership Team
- Regional data reports to identify regional target sectors – Subsequent validation at the Institute
- Regional Institute for all regions to attend
- Develop ongoing website to support sectors approach
- Review and revise regional sector plans
- Prepare final report with accomplishments, findings, and recommendations for moving forward
## VI. TIMELINE

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Aug</th>
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</thead>
<tbody>
<tr>
<td>A. PRELIMINARY ACTIVITIES:</td>
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<td>Kickoff meeting – On-site</td>
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<tr>
<td>Complete project plan – Approved by State</td>
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<td>Establish Share Point space</td>
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<tr>
<td>B. STATEWIDE/STATE-LEVEL ACTIVITIES:</td>
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<tr>
<td>1. Determine regional configuration for strategy development</td>
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<td>2. Form Leadership Team:</td>
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<td>Provide guidance to state</td>
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<tr>
<td>Develop Draft Charter, Agenda, PPT, etc. for mtg #1</td>
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<tr>
<td>Convene Mtg #1 (on-site)</td>
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<td>3. Partner with State to produce Data reports:</td>
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<td>Form multi-agency data team</td>
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<tr>
<td>Identify data-based target sectors – Statewide and four regions</td>
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<td>Analysis of talent pipeline in four regions</td>
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<td>4. Leadership Team Mtg. #2</td>
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<tr>
<td>Validate statewide sectors</td>
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<tr>
<td>Obtain any support needed for regional activities</td>
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Month

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<th>Month</th>
<th>Aug</th>
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</thead>
</table>
### C. REGIONALLY FOCUSED ACTIVITIES:

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<th>Month</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
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<tr>
<td>Develop and Facilitate one-day Sector Strategies Orientation Seminar (SS 101 – Week of October 12)</td>
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<td>Complete Regional Sector Strategies Self-Assessment (QSAP)</td>
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<td>★</td>
<td>★</td>
<td>★</td>
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<tr>
<td>• Ensure state has secured formation of regional teams</td>
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<td>★</td>
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<td>★</td>
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<tr>
<td>• Webinar to instruct regional teams in self-assessment process</td>
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<tr>
<td>• Collect results to inform Institute development</td>
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<td>Prepare for and hold two-day Regional Institute</td>
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<tr>
<td>• Validate regional target sectors</td>
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<tr>
<td>• Identify areas of opportunity and challenge</td>
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<tr>
<td>• Facilitates regional planning</td>
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<td>Collect and review/revise regional plans</td>
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<td>★</td>
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*** PROVISO 117.127 Report Due Feb.1***

### D. STATEWIDE/STATE-LEVEL ACTIVITIES

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<tr>
<th>Month</th>
<th>Aug</th>
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<td>Develop and deploy the required</td>
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<tr>
<td>10. Prepare Sector Strategies 101 for online presentation</td>
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<td>11. Prepare recommendations and final report</td>
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<tr>
<td>• Leadership Team meeting #3 - Present draft recommendations for plan of action</td>
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<td>• Draft final report</td>
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<td>• Feedback from State</td>
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<tr>
<td>• Prepare final report</td>
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</table>

Month #: Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr
Appendix B: Summary of Analysis of Statewide Industry Clusters in South Carolina

We provided the Data Team with the following documents, which are the data source for this analysis:

- Cluster Summary Report which includes a charts with the 23 clusters ranked by size and average wage, growth, shift share, and location quotient as well as a bubble chart that plots most of this information on a one-page graphic;
- Highest Ranked Industry report which ranks the top 50 5-digit NAICS industries (industry drivers) by size and average wage, growth, shift share, and location quotient;
- A document called Summary of Clusters and Drivers by Region and Statewide in South Carolina, which puts the clusters and the drivers together.

From the data, there were eight Clusters identified as having competitive advantage.

- Vehicle Manufacturing (2.38)
- Chemicals, Rubber, and Plastics (1.92)
- Lumber and Wood Products (1.76)
- Metal and Metal Fabricating (1.59)
- Automotive Services (1.36)
- Retail (1.16)
- Hospitality (1.10)
- Health Care (.93)

As the Data Team discussed them, and additional data was sought, the following actions were taken:

- Vehicle Manufacturing and Metals and Metal Fabricating combined to form Metals and Metal Fabricating (including Vehicles)
- Textiles added as a cluster
- Chemicals, Rubber, and Plastics and Lumber and Wood Products affirmed as clusters
- Metals, Textiles, Chemicals, and Lumber now sub-clusters of a larger Diversified Manufacturing Cluster
- Business Services and Communications and IT Services combined to form Business and IT Services
- Health Care affirmed as cluster
- Hospitality and Retail rejected as statewide priorities, left to regions
- Automotive Services, Logistics and Transportation, Wholesale Trade, and Construction to be studied further
At the end of the discussion, the Data Team made the following recommendations for statewide Industry Clusters. We will discuss these in our meeting on November 2, as well as additional discussion questions.

- Diversified Manufacturing
  - Metal and Metal Fabricating (including Vehicles)
  - Textiles
  - Lumber and Wood Products
  - Chemicals, Rubber, and Plastics
- Business and Information Technology Services
- Health Care
- Transportation, Logistics, and Wholesale Trade (to be studied)
- Construction (to be studied)

<table>
<thead>
<tr>
<th>Cluster</th>
<th>2015 Jobs</th>
<th>2025 Jobs</th>
<th>Change</th>
<th>% Change</th>
<th>2015 LQ</th>
<th>2025 LQ</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care</td>
<td>243,004</td>
<td>303,465</td>
<td>60,461</td>
<td>25%</td>
<td>.91</td>
<td>.93</td>
<td>3%</td>
</tr>
<tr>
<td>Business and IT</td>
<td>229,038</td>
<td>280,320</td>
<td>51,283</td>
<td>22%</td>
<td>.87</td>
<td>.90</td>
<td>3%</td>
</tr>
<tr>
<td>Construction</td>
<td>145,352</td>
<td>157,266</td>
<td>11,914</td>
<td>8%</td>
<td>1.01</td>
<td>.97</td>
<td>-3%</td>
</tr>
<tr>
<td>Logistics</td>
<td>122,452</td>
<td>138,003</td>
<td>15,551</td>
<td>13%</td>
<td>.83</td>
<td>.85</td>
<td>2%</td>
</tr>
<tr>
<td>Metals</td>
<td>101,931</td>
<td>111,336</td>
<td>9,406</td>
<td>9%</td>
<td>1.51</td>
<td>1.59</td>
<td>5%</td>
</tr>
<tr>
<td>Chemicals</td>
<td>44,646</td>
<td>46,643</td>
<td>1,996</td>
<td>4%</td>
<td>1.83</td>
<td>1.92</td>
<td>5%</td>
</tr>
<tr>
<td>Lumber</td>
<td>29,325</td>
<td>30,299</td>
<td>974</td>
<td>3%</td>
<td>1.60</td>
<td>1.76</td>
<td>10%</td>
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<tr>
<td>Textiles</td>
<td>21,450</td>
<td>16,172</td>
<td>-5,279</td>
<td>-25%</td>
<td>2.75</td>
<td>2.55</td>
<td>-7%</td>
</tr>
</tbody>
</table>
Appendix C: Final Report of Statewide Industry Clusters

Final Report of Statewide Industry Clusters

Submitted to:
State of South Carolina
Department of Employment and Workforce

Submitted by:
Maher & Maher
3535 Route 66, Bldg. 4
Neptune, NJ 07753
732-918-8000
www.mahernet.com

June 2016
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   Industry Analysis ............................................................................................................................. 7
   Planning/Policy Issues to Consider .................................................................................................. 10
   Occupational Considerations .......................................................................................................... 11
   Deliberations and Conclusions of the State Data Team ................................................................. 11
   Going Forward ................................................................................................................................. 15
APPENDIX .......................................................................................................................................... 17
INTRODUCTION: Regional Economies, Industry Sectors and Clusters

Any industry exists within a web of relationships that relates to its supply and distribution chain. The companies in these industries use inputs such as raw materials, energy, and labor to provide goods and services which ultimately are delivered to their consumers. These supply and distribution networks operate without respect to geographies and jurisdictions. Individual industries become a part of industry clusters when multiple companies from related industries gather in the same or adjacent areas or regional economies where they can take advantage of common elements, such as labor, which is especially critical for our purposes. WIOA underscores the idea that economic and workforce development planning and programming is most effectively done on a regional basis.

Every regional economy consists of a mix of industries that play a greater or lesser role in the overall number of jobs that exist and in the overall value of goods and services produced. Economists speak of jobs as employment and the value of goods and services as output. Statistics related to employment and output allow researchers to compare growth in an economy over time (past or future) as well as to compare our economy to other regions around the country.

When we add the workforce development component to an industry cluster in a regional economy, our strategy development requires us to identify those industry clusters, occupations, and career pathways that are most crucial to growing the regional economy, and that will therefore provide the optimum mix of employment opportunities.

To make valid comparisons, researchers need definitions that are consistent. This study uses 22 industry clusters that were previously defined and used extensively around the country in helping workforce, economic development, and educational entities identify priority industry clusters. These industry clusters include:

<table>
<thead>
<tr>
<th>Agriculture Production</th>
<th>Construction</th>
<th>Metals and Metal Fabricating</th>
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</thead>
<tbody>
<tr>
<td>Food Processing</td>
<td>Chemicals, Rubber, and Plastics</td>
<td>Lumber and Wood Products</td>
</tr>
<tr>
<td>Communications and IT Manufacturing</td>
<td>Communications and IT Services</td>
<td>Textiles</td>
</tr>
<tr>
<td>Biotechnology</td>
<td>Transportation and Logistics</td>
<td>Wholesale Trade</td>
</tr>
<tr>
<td>Business Services</td>
<td>Financial Services</td>
<td>Health Care</td>
</tr>
<tr>
<td>Real Estate and Building Services</td>
<td>Government</td>
<td>Retail</td>
</tr>
<tr>
<td>Hospitality</td>
<td>Energy and Utilities</td>
<td>Personal Services</td>
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<tr>
<td>Education</td>
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</table>
Our work around the country reveals that these definitions account for 95-100% of all companies in a local economy. They follow the work of Michael Porter, which suggests that an industry cluster consists of a core industry as well as its supply and distribution chains. This is different from the North American Industrial Classification System (NAICS), which is essentially a listing of industries, and is more functional for our purposes.

Using this way of conceiving clusters, a cluster like Construction would not only include the companies that build homes, commercial and industrial properties, and highways and bridges, but also the companies that supply the stone for driveways, the lumber and drywall for walls, the trusses for roofs, and all of the other materials needed to build a house, as well as the realtors that sell the houses.
DETERMINING PRIORITY CLUSTERS

Once we have the clusters defined, prioritizing the clusters that are the best bets for economic and workforce development investments is the next task.

Our conceptual approach is primarily a demand-driven, industry-based approach. It is one that is used primarily in economic development circles. However, it offers benefits for workforce development because: (a) it bundles industries where occupations are likely to require skills that are transferable; (b) it still allows us to hone in on specific occupations that may be growing or changing/improving in nature; and (c) it makes it more likely that economic development officials will see the ultimate target industries through the same lens as workforce developers, thereby enhancing alignment. Implications for career pathways and training curriculum grow out of this analysis where the voice of the industry is loud and clear.

Local competitive advantage (location quotient, or LQ) seeks to identify those industries where the local area has certain advantages and as a result does things better than the competition around the country. Competitive advantage may result from access to raw materials, access to markets, an effective transportation system, knowledge generated in local research institutions, knowledge that is imbedded in the skills of the local workforce, or just the presence of an entrepreneur who has located in the local region. LQ alerts us to the presence of a competitive advantage but does not tell us exactly what that advantage is.

For us, competitive advantage (as measured by the location quotient statistic) is the primary metric for determining priority industries, followed by job growth projections and absolute size of employment in the industry.

Location quotient measures the concentration of employment in the industry locally relative to the concentration of employment in the industry nationally. The assumption is that an industry with a concentration above the national average (above the number “1” in our report tables) has some sort of local competitive advantage that we need to recognize and act upon. For example, in the listing below of top industry clusters and drivers in the state, Vehicle Manufacturing has an LQ of 2.38, which means that the region has 2.38 times the national average of employment concentration in that industry.

The following documents are the source of the data for this analysis (The Appendix contains all the data runs referred to in this discussion. The cover page to the Appendix explains the report structure and the general content of each report.):

- Cluster Summary Report (Report #1 in the Appendix), which includes charts with the 22 clusters ranked by size and average wage, growth, shift share, and location quotient as well as a bubble chart that plots most of this information on a one-page graphic;
- **Highest Ranked Industry Report (Report #2 in the Appendix),** which ranks the top 50 5-digit NAICS industries (industry drivers) by size and average wage, growth, shift share, and location quotient;
- A document called **Summary of Clusters and Drivers by Region** (Report #3 in the Appendix), which aligns the driver industries under each cluster title; and
- **Occupational Report (Report #4 in the Appendix),** which includes a chart with projected occupational openings, another chart with the Top 100 openings, and a chart that organizes the Top 100 occupations into prospective Career Pathways for occupations that are in multiple industries.

The above bubble chart for this region (also Report #1E in the Appendix) summarizes the Cluster Summary Report and location quotient, projected percentage change in employment, and size of employment in each of the 22 pre-determined industry clusters. Priority clusters can appear in any one of the first three quadrants: Bubbles representing the 22 clusters are shown on the graphic on the following page with four quadrants where:

- The upper right quadrant indicates high LQ and high projected growth;
- The upper left shows industries with high projected growth but less than average LQ;
• The lower left indicates, negative projected growth and less than average LQ.
• The lower right depicts industries with high LQ but negative growth projections. This may be the case with so-called “legacy industries”, which project as being in decline but may be large industries in terms of jobs, and may present a significant competitive advantage for the region. In this region of South Carolina, textiles would fall into the “legacy” category.

We do the Highest Ranked Industry Report (Report #2 in the Appendix) to ensure that we recognize industry drivers (five digit NAICS code industries) that have high location quotients and rapid growth but that may show a lesser impact when they are consolidated into a cluster. Drivers point to highly competitive and rapidly growing industries that may be the essence of local competitive advantage. Matching drivers to clusters in the Summary of Clusters and Drivers by Region (See Report #3 in the Appendix) allows us to see other drivers that we may have missed in our cluster analysis.

THE STATE OF SOUTH CAROLINA

Demographics

South Carolina includes 46 counties what have been formed into four regions – Central, PeeDee, South Coast, and Upstate – for ease of analysis and planning in this project.

The following table shows key demographics for the comparison with the state as a whole and the other regions:

<table>
<thead>
<tr>
<th>Region</th>
<th>Population (2015)</th>
<th>Population (2025)</th>
<th>Change</th>
<th>% Change</th>
<th>Age 55+</th>
<th>Less than HS</th>
<th>AAS or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Carolina</td>
<td>4,877,827</td>
<td>5,146,532</td>
<td>268,705</td>
<td>6%</td>
<td>29%</td>
<td>15%</td>
<td>34%</td>
</tr>
<tr>
<td>Central</td>
<td>1,393,462</td>
<td>1,468,643</td>
<td>75,181</td>
<td>5%</td>
<td>28%</td>
<td>14%</td>
<td>36%</td>
</tr>
<tr>
<td>PeeDee</td>
<td>965,492</td>
<td>1,003,007</td>
<td>37,515</td>
<td>4%</td>
<td>33%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>South Coast</td>
<td>1,005,040</td>
<td>1,098,261</td>
<td>93,221</td>
<td>9%</td>
<td>29%</td>
<td>11%</td>
<td>39%</td>
</tr>
<tr>
<td>Upstate</td>
<td>1,513,833</td>
<td>1,576,621</td>
<td>62,788</td>
<td>4%</td>
<td>29%</td>
<td>18%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Industry Analysis

As mentioned above, for us, competitive advantage (as measured by the location quotient statistic) is the primary metric for determining priority industries, followed by job growth.
projections and absolute size of employment in the industry (See Reports #1D, #1B, and #1A in the Appendix).

Ranked only by projected location quotient in 2025 (number in parentheses is location quotient), the top industry clusters and drivers included (additional information can be seen in Report #3):

- **Vehicle Manufacturing (2.38)**
  - Tire Manufacturing (16.36, 1,678)
  - Motor Vehicle Brake System Manufacturing (12.04)
  - All Other Transportation Equipment Manufacturing (2.40)
  - Boat Building (5.74)
  - Military Armored Vehicle, Tank, and Tank Component Manufacturing (1.34)
  - Automobile Manufacturing (4.47)
  - Aircraft Manufacturing (3,824)
  - Motor Vehicle Transmission and Power Train Manufacturing (1,829)

- **Chemicals, Rubber, and Plastics (1.92)**
  - Surface Active Agent Manufacturing (20.87)
  - Artificial and Synthetic Fibers and Filament Manufacturing (14.96)
  - Hazardous Waste Treatment and Disposal (12.06)
  - Hazardous Waste Collection (4.82)
  - Plastic Bag and Pouch Manufacturing (4.42)

- **Lumber and Wood Products (1.76)**
  - Paperboard Mills (8.25)
  - Pulp Mills (2.17)
  - Other Paperboard Container Manufacturing (5.07)
  - Wood Preservation (5.77)
  - Sanitary Paper Product Manufacturing (5.23)
  - Reconstituted Wood Product Manufacturing (4.90)
  - Softwood Veneer and Plywood Manufacturing (8.10)
  - All Other Converted Paper Product Manufacturing (5.51)

- **Metal and Metal Fabricating (1.59)**
  - Ball and Roller Bearing Manufacturing (16.83)
  - Turbine and Turbine Generator Set Units Manufacturing (8.89)
  - Power-Driven Handtool Manufacturing (11.16)
  - Household Refrigerator and Home Freezer Manufacturing (4.49)
  - Residential Electric Lighting Fixture Manufacturing (8.94)
  - Fabricated Pipe and Pipe Fitting Manufacturing (7.04; 1,612)
  - Rolled Steel Shape Manufacturing (7.43)
  - Totalizing Fluid Meter and Counting Device Manufacturing (5.20)
  - Other Metal Valve and Pipe Fitting Manufacturing (6.89)
  - Fluid Power Pump and Motor Manufacturing (4.61)
  - Storage Battery Manufacturing (5.32)
• Automotive Services (1.36)
• Retail (1.16)
  o Discount Department Stores (5,023)
  o Home Centers (3,617)
  o Warehouse Clubs and Supercenters (3,519)
  o Pharmacies and Drug Stores (2,242)
  o Women’s Clothing Stores (1,859)
  o Supermarkets and Other Grocery Stores (1,840)
• Hospitality (1.10)
  o Full-Service Restaurants (9,604)
  o Limited-Service Restaurants (4,871)
  o Hotels (2,107)
• Health Care (.93)
  o Offices of Physicians (9,652)
  o Home Health Services (6,888)
  o General Medical and Surgical Hospitals (5,923)
  o Nursing Care Facilities (4,375)
  o Services for the Elderly (3,870)
  o Offices of Dentists (3,039)

Many of these industry clusters are truly statewide in their geographical scope and competitive in multiple regions, such as...

  o Vehicle Manufacturing (3 of 4 regions, #1 in two and #3 in one region)
  o Chemicals, Rubber, and Plastics (3 of 4 regions, #1 or #2 or #5 in three regions)
  o Lumber and Wood (4 of 4 regions, #1 or #2 or #4 or #10 in four regions)
  o Metal and Metal Fabricating (4 of 4 regions, #2 or #3 or #6 or #7 in four regions)
  o Automotive Services (4 of 4 regions, #4 in three regions or #6 in one region)
  o Retail (4 of 4 regions, #3 or #5 in one region or #9 in two regions)

One industry cluster, which has a large location quotient in its region, translates to larger statewide clusters but are mostly in the Pee Dee and South Coast regions metro areas.

  o Hospitality (#2 in Pee Dee and #3 in South Coast)

In addition, we have found several clusters that rank low on the statewide ranking but which are moderately competitive in certain regions of the state.

  o Government (LQ, 1.07; #6 in Midlands and South Coast)
  o Education (LQ, 1.00, #8 in Midlands and #10 in Upstate)
  o Logistics and Transportation (LQ, .91, #8 in Upstate and South Coast)
  o Food Processing (LQ, .91, #5 in Upstate and #7 in Pee Dee)
Health Care as an industry cluster is only marginally competitive (LQ, 0.93; #9 in Pee Dee and #10 in Upstate). However, Health Care is one of the largest industries in the state and will grow significantly in the next decade. Two segments of Health Care, home health services and nursing care facilities, are anticipated to grow more than 11,000 jobs with very high percentage increases in many regions. It is expected to grow 35% in the decade compared to health care as a whole, which is projected at a 25% growth rate. It may be advantageous to focus Health Care on services to the elderly.

Temporary help services is an industry which also needs some further analysis. In the decade being examined, we predict an increase of more than 18,600 jobs or 31% in this industry segment. The largest category of jobs is in Manufacturing industries and the Production and Administrative Support career pathways. They are recorded in the Business Services industry clusters but we may want to take a look at whether that needs to be changed.

One of our key planning tasks involves prioritizing the clusters that will be the focus of our investment of time, funding, and programming in the near future. For that reason, we are interested in finding 4-5 clusters that will be our priorities going forward.

Planning/Policy Issues to Consider

All of the questions below were generated from the documents discussed above, and that are also available in the Appendix:

- Do the six truly statewide clusters make sense?
  - Does Vehicle Manufacturing and Metals and Metal Fabricating need to be combined in some way to account for supply chain connections that surely exist which would make Vehicle Manufacturing larger or should the clusters just be combined because of the common skill sets?
  - Should the large number of temporary workers in production be added to all of the manufacturing categories in some way?
  - Should Retail be included because of its traditionally low wage?
  - Should Health Care be added because of its sheer size and growth numbers even though it is not “competitive”?
  - Should Health Care be more focused on services to the elderly?
  - Should we add the Textile industry as another cluster? I did not account for it in my initial data runs but find quite a few niche industries statewide. Does the state still have confidence in the industry or not? Should I run the data for it?

- Are there significant Highly-Ranked Industries that are not a part of a Cluster that should have some type of recognition? For example, on the Fastest Growing Industries chart in the HRI document, Engineering Services, Computer Systems Design Services, and Wireless Communications Carriers.
- Do you want to make any recommendations for regions to work together on multi-region but sub-state regions? For example, Pee Dee and South Coast both have large Hospitality clusters.
- How do the six statewide Cluster identified above compare to other studies that have been done in the past?

**Occupational Considerations**

An Occupational Report (Report #4 in the Appendix), which includes a chart with projected occupational openings, another chart with the Top 100 openings, and a chart that organizes the Top 100 occupations into prospective Career Pathways for occupations that are in multiple industries, is included in the Appendix for reference. Some of this information may be relevant as you make your cluster choices.

Ultimately, we will be interested in looking at the staffing patterns of the industry clusters that are chosen and compare them with this career pathway information as a basis for programming decisions.

**Deliberations and Conclusions of the State Data Team**

A State Data Team comprised of representatives from the workforce, education, and economic development systems began its deliberations in early October 2015 with a series of webinars and conference calls. The Team used the Consensus-Based Decision Support Model as a framework for the process, as shown below. It received the statewide data noted above and discussed the planning and policy issues also enumerated above.

**Target Industry Selection:**

Consensus-Based Decision Making Model™

- Form Leadership Team and Data Team subgroup
- Data Team defines target industry selection criteria
- Conduct Data Analysis to identify potential targets
- Leadership Team accepts/rejects/refines findings of Data Team
- Data Team applies selection criteria to data to select top statewide targets
- Data Team presents findings and rationale to Leadership Team
Through a series of discussions that sometimes included the whole Team and other times included sub-groups of the Team, its members worked with the Maher data consultant to understand the data itself, its interpretation, and its possible implications for the Regional Data Teams. The State Team decided that Regional Data Teams should be established and use a similar process to define the priority industries for their areas.

At the direction of the Statewide Data Team, the following actions were taken:

• Vehicle Manufacturing and Metals and Metal Fabricating combined to form Metals and Metal Fabricating (including Vehicles)
• Textiles added as a cluster
• Chemicals, Rubber, and Plastics and Lumber and Wood Products affirmed as clusters
• Metals, Textiles, Chemicals, and Lumber now sub-clusters of a larger Diversified Manufacturing Cluster
• Business Services and Communications and IT Services combined to form Business and IT Services
• Health Care affirmed as cluster
• Hospitality and Retail rejected as statewide priorities, left to regions
• Automotive Services, Logistics and Transportation, Wholesale Trade, and Construction to be studied further

After the results were reviewed, the Data Team made the following recommendations for statewide Industry Clusters.

• Diversified Manufacturing
  – Metal and Metal Fabricating (including Vehicles)
  – Textiles
  – Lumber and Wood Products
  – Chemicals, Rubber, and Plastics
• Business and Information Technology Services
• Health Care
• Transportation, Logistics, and Wholesale Trade (to be studied)
• Construction

Information related to Temporary Services showed that occupations related to Diverse Manufacturing (Team Assemblers, Helpers, Inspectors and Testers, Machine Operators, and Machinists) and Logistics, Transportation, and Wholesale Trade (Customer Service Representatives, Materials Handlers, Packers, Industrial Truck and Tractor Operators, Stock Clerks and Order Fillers, and Truck Drivers) were very well represented in the top occupations. Occupations related to the Health Care industry (Registered Nurses, Nursing Assistants, Licensed Practical Nurses, Personal Care Aides, and Home Health Aides) and clerical occupations (Office Clerks, Secretaries, Bookkeeping Clerks, Receptionists, and Data Entry Keyers) also appeared in the top 25.
For a more complete view of the data related to Temporary Services, see Reports 5a and b in the Appendix below.

As a result of the changes made to the industry cluster definitions outlined above, a revised Cluster Summary Report (see Report #6) including a simplified bubble chart.

From the Bubble Chart and in the chart below, the top industry clusters that the Regional Data Team selected as priority clusters are shown.

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Employment 2015</th>
<th>Employment 2025</th>
<th>Change</th>
<th>%</th>
<th>LQ 2015</th>
<th>LQ 2025</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversified Manufacturing</td>
<td>196,537</td>
<td>205,694</td>
<td>9,157</td>
<td>5%</td>
<td>1.70</td>
<td>1.79</td>
<td>5%</td>
</tr>
<tr>
<td>Business and IT</td>
<td>230,250</td>
<td>286,300</td>
<td>56,050</td>
<td>24%</td>
<td>.89</td>
<td>.92</td>
<td>4%</td>
</tr>
<tr>
<td>Health Care</td>
<td>245,718</td>
<td>311,538</td>
<td>65,820</td>
<td>27%</td>
<td>.92</td>
<td>.95</td>
<td>3%</td>
</tr>
<tr>
<td>Logistics, Transportation, and Wholesale</td>
<td>125,210</td>
<td>143,355</td>
<td>18,145</td>
<td>14%</td>
<td>.85</td>
<td>.87</td>
<td>3%</td>
</tr>
<tr>
<td>Construction</td>
<td>143,065</td>
<td>152,619</td>
<td>9,554</td>
<td>7%</td>
<td>1.00</td>
<td>.96</td>
<td>-5%</td>
</tr>
</tbody>
</table>
• Diversified Manufacturing is very large. It is growing moderately but expected to improve its competitive position.

• Business and IT Services is very large and growing rapidly. It is not yet at the national average for competitiveness but it is expected to improve its competitive position significantly over the period.

• Health Care and Logistics, Transportation, and Wholesale Trade have a similar profile...large, growing, not nationally competitive but expected to improve its position.

• Construction will gain in employment but will also lose competitive advantage over the period. The local Team will look at the reason for change in competitiveness in those areas and work with economic development authorities to reverse the trends noted in the data.

• For the purposes of this project, the Statewide Data Team selected the Diversified Manufacturing, Business and IT Services, and Health Clusters (as defined for the state) to be the foci of further immediate planning efforts. Logistics, Transportation, and Wholesale Trade and Construction will be considered for concentration in the future.

• A Staffing Pattern (Report #7 in the Appendix) lists the occupations that are a part of the workforce for the specific industry being examined. They are listed in descending order from most prevalent to least prevalent.

• Within Diversified Manufacturing, the top occupations are:
  - Team Assemblers
  - First-Line Supervisors of Production and Operating Workers
  - Inspectors, Testers, Sorters, Samplers, and Weighers
  - Machinists
  - Material Handlers
  - Industrial Engineers
  - Welders
  - Industrial Machinery Mechanics
  - General Maintenance and Repair Workers
  - Computer-Controlled Machine Operators

For Business and IT Services, the top occupations include:

• Customer Service Representatives
• Material Handlers
• Security Guards
• Team Assemblers
• Accountant and Auditors
• Secretaries
• Office Clerks
• Lawyers
• Management Analysts
• Bookkeeping, Accounting, and Auditing Clerks
These occupations lead the Health Care cluster:

- Registered Nurses
- Nursing Assistants
- Personal Care Aides
- Home Health Aides
- Medical Assistants
- Licensed Practical and Licensed Vocational Nurses
- Receptionists
- Medical Secretaries
- Office Clerks
- Customer Service Representatives

At some point in time, we recommend that the State Data Team compare the Staffing Pattern (Report #7 in the Appendix) for their chosen industries with the Career Pathway information that has been provided in the Occupation Report, which is Report #4 in the Appendix. The Occupation Report allows Teams to take a view across industries of the occupations that have been identified in the Staffing Pattern. Knowing the total number of those working in an occupation across all industries may be a much more useful number than knowing just how many work in one industry, particularly for providing education and training to people at a larger scale as part of the region’s sector strategy.

- Understanding the interaction between skills within a cluster and across clusters and how they flow through occupations is the knowledge base that links the demand side to the supply side and forms the connection to sector work in the workforce and education worlds.

**Going Forward**

Now that the Regional Data Teams have made their recommendations, we recommend that the State Data Team reconvene to look at their conclusions internally and to examine where industries appear in other regions. The Regional areas already have some idea about the way that clusters relate to their local industries, but the State Team may be able to identify ways that the state workforce system can support industry projects that flow across regions.

- Gathering the State Team would allow it to identify next steps as it connects with the supply side of sector work through career pathways and their alignment to the skill acquisition in the state. In addition, the reconvened State Team should:
  
a. Find ways and means of integrating all statewide data needs related to building the talent pipeline, and deciding on a common language and continuous identification of focus industries for all to “aim at”
b. Provide integrated support to the regional data teams
   c. Provide additional data to regions

- More comprehensive recommendations related to data and Data Teams appear in the main report text.
APPENDIX

NOTE: Due to the length of the Appendices, the following will be posted to the South Carolina Talent Development website.

Index of Reports and Charts

Within this Appendix, the reader will find the raw data for this text analysis and discussion within Charts and Report as indicated below:

REPORT #1 – CLUSTER SUMMARY REPORT, which includes charts with the 22 clusters ranked by size and average wage, growth, shift share, and location quotient, as well as a bubble chart that plots most of this information on a one-page graphic:

- **Report 1B - Industry Group Growth Comparison**: Includes 2015 and 2025 jobs, the change in jobs, and the percentage change in jobs; ranked by percentage change in jobs.
- **Report 1C - Industry Group Shift Share**: Includes projected jobs change as well as a breakdown of the source of growth or decline. Competitive effect is the expected growth or decline in the region. Ranked by competitive effect.
- **Report 1D - Industry Group Location Quotient**: Includes 2015 jobs, 2015 location quotient, 2025 location quotient, and percentage change in location quotients; ranked by 2015 location quotient. Location quotient is a measure of the concentration of the industry in the local area compared to the industry nationally.
- **Report 1E - Bubble Chart** (see explanation above)

REPORT #2 – HIGHEST RANKED INDUSTRY REPORT, which ranks the top 50 5-digit NAICS industries (industry drivers) by size and average wage, growth, shift share, and location quotient:

- **Report 2A - Largest Industries**: Includes 2015 and 2025 jobs, the change in jobs, and the percentage change in jobs along with the 2015 average earnings of workers; ranked by 2015 jobs.
- **Report 2B - Highest Paying Industries**: Includes 2015 and 2025 jobs, the change in jobs, and the percentage change in jobs along with the 2015 average earnings of workers; ranked by average earnings.
- **Report 2C - Fastest Growing Jobs**: Includes 2015 and 2025 jobs, the change in jobs, and the percentage change in jobs along with the 2015 average earnings of workers; ranked by the change in jobs.
• **Report 2D - Most Competitive Industries**: Includes projected jobs change as well as a breakdown of the source of growth or decline. Competitive effect is the expected growth or decline in the region. Also, includes 2015 average earnings of workers. Ranked by competitive effect.

• **Report 2E - Highest Industry Cluster Industries**: Includes 2015 and 2025 jobs, percentage change, 2015 location quotient, 2025 location quotient, and percentage change in location quotients as well as average earnings of workers; ranked by 2015 location quotient. Location quotient is a measure of the concentration of the industry in the local area compared to the industry nationally.

**REPORT #3 – SUMMARY OF CLUSTERS AND DRIVERS BY REGION**, which aligns the driver industries under each cluster title.

**REPORT #4 – OCCUPATIONAL REPORT**, which includes a chart with projected occupational openings, another chart with the Top 100 openings, and a chart which organizes the Top 100 occupations into prospective Career Pathways for occupations that are in multiple industries:

• **Report 4A – Projected Occupational Openings**: Includes SOC code and description, 2015 and 2025 jobs, the change in jobs, percentage change, average hourly earning, and openings; ranked by openings.

• **Report 4B – Top 100 Openings**: Includes SOC code and description, 2015 and 2025 jobs, the change in jobs, percentage change, average hourly earning, and openings; ranked by openings.

• **Report 4C – Career Pathways**: Includes SOC code and description, 2015 and 2025 jobs, the change in jobs, percentage change, average hourly earning, and openings; ranked by openings within categories that group jobs into pathways by wage and skill progression.

**REPORT #5 – TEMPORARY SERVICES**

• **Report 5A – Staffing Pattern of Temporary Services Industry**: Includes occupations from most prevalent to least prevalent in the Temporary Services industry.

• **Report 5B – Inverse Staffing Pattern of Temporary Services Industry**: Shows the industries where the occupations listed in the Staffing Pattern above actually work.

**REPORT #6 – REVISED CLUSTER SUMMARY REPORT**

• **Report 6A - Industry Group Jobs and Earnings**: Includes 2015 and 2025 jobs, earnings per worker, and establishments; ranked by 2015 employment.

• **Report 6B - Industry Group Growth Comparison**: Includes 2015 and 2025 jobs, the change in jobs, and the percentage change in jobs; ranked by percentage change in jobs.
• **Report 6C - Industry Group Shift Share**: Includes projected jobs change as well as a breakdown of the source of growth or decline. Competitive effect is the expected growth or decline in the region. Ranked by competitive effect.

• **Report 6D - Industry Group Location Quotient**: Includes 2015 jobs, 2015 location quotient, 2025 location quotient, and percentage change in location quotients; ranked by 2015 location quotient. Location quotient is a measure of the concentration of the industry in the local area compared to the industry nationally.

• **Report 6E - Bubble Chart** (see explanation above)

**REPORT #7 – STAFFING PATTERN FOR THE DIVERSIFIED MANUFACTURING, BUSINESS AND IT SERVICES, AND HEALTH CARE INDUSTRIES** shows the occupations from most prevalent to least prevalent in the industry in the State.
Appendix D: Regional Data Reports

Due to the length of extensive data runs, the Regional Data Reports that are referred to as “Appendices” in this document do not appear in this final overall project report. However, those Appendices have been shared with the regions, and will be available online at the South Carolina Talent Development website.
Appendix E: Regional Plan Frameworks

**SOUTH COAST Regional Plan Framework**

South Coast Regional Vision

_Data-driven and employer-validated talent solutions that integrate regional education, workforce and economic development resources across systems to empower employers, individuals, and communities to prosper and grow the region’s economy._

<table>
<thead>
<tr>
<th>South Coast Target Sectors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary</strong></td>
</tr>
<tr>
<td>Diversified Manufacturing</td>
</tr>
<tr>
<td>Healthcare</td>
</tr>
<tr>
<td><strong>Secondary</strong></td>
</tr>
<tr>
<td>Construction Trades</td>
</tr>
<tr>
<td>Information Technology (IT)</td>
</tr>
<tr>
<td>Transportation, Distribution, and Logistics (TDL)</td>
</tr>
</tbody>
</table>

1. Gather, Analyze, and Validate Workforce Data/Intelligence

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategies</th>
<th>Action Steps</th>
<th>Target Date</th>
<th>Status / Notes</th>
</tr>
</thead>
</table>
| 1.1. Regional Target Sectors | • Achieve regional consensus through the use of a variety of data sources to determine sectors for priority focus  
• Obtain buy-in from all partners | • Review ‘Charleston Region Talent Strategy’ report  
• Review ‘Analysis of South Coast Region Industry Clusters’ data report  
• Compare and discuss report findings at the Regional Sectors Planning Institute on 3/30-31/16  
• Discuss all data questions with the state data team  
• Determine proposed sectors for priority focus  
• Present proposed sectors for priority focus to full team for consideration, feedback, and approval | 4/8/16 | Completed       |
### 1.2. Sector-specific Data Committees

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committees will provide detailed analyses regarding specific target sectors’ industry needs</td>
</tr>
<tr>
<td>Form data committees at the 4/28/16 meeting</td>
</tr>
<tr>
<td>Analyze staffing pattern data and present findings to the full team</td>
</tr>
<tr>
<td>Based on this analysis, the full team will</td>
</tr>
<tr>
<td>o determine final focus industries and jobs,</td>
</tr>
<tr>
<td>o get employer validation (and buy-in),</td>
</tr>
<tr>
<td>o discuss the need for new curricula (incl. work-based learning) and/or elimination of obsolete curricula, plan career pathways, etc.)</td>
</tr>
<tr>
<td>Committee members are as follows:</td>
</tr>
<tr>
<td>Diversified Manufacturing</td>
</tr>
<tr>
<td>o Kim Statler</td>
</tr>
<tr>
<td>o Robert Crenshaw</td>
</tr>
<tr>
<td>o Tana Lee</td>
</tr>
<tr>
<td>o Wendy Courson</td>
</tr>
<tr>
<td>o Cathy Clower</td>
</tr>
<tr>
<td>Healthcare</td>
</tr>
<tr>
<td>o Hank Amundson</td>
</tr>
<tr>
<td>o Michelle Adams</td>
</tr>
<tr>
<td>o Karen Gilbert</td>
</tr>
<tr>
<td>o Glenda Howard</td>
</tr>
</tbody>
</table>

**4/28/16 Completed**

### 1.3. Healthcare Target Industries and Occupations

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieve regional consensus on specific healthcare industries and occupations for priority focus</td>
</tr>
<tr>
<td>Obtain buy-in from all partners</td>
</tr>
<tr>
<td>Per the Healthcare Data Committee, the South Coast Region should focus on the following healthcare Industries (incl. employment change from 2015 – 2025):</td>
</tr>
<tr>
<td>o Nursing Care Facilities Healthcare Assistants – 653 (21%)</td>
</tr>
<tr>
<td>o Home Health Care Aides – 1407 (58%)</td>
</tr>
<tr>
<td>o Hospitals, State – 753 (10%)</td>
</tr>
<tr>
<td>o Dentists – 685 (25%)</td>
</tr>
<tr>
<td>o Physicians – 3214 (32%)</td>
</tr>
<tr>
<td>o Hospitals, Medical/Surgical – 1058 (14%)</td>
</tr>
<tr>
<td>o Physical Therapies – 427 (43%)</td>
</tr>
<tr>
<td>o Ambulance Services – 151</td>
</tr>
<tr>
<td>o Temporary Health Services – 2588</td>
</tr>
<tr>
<td>o Back Office – 640</td>
</tr>
<tr>
<td>Per the Healthcare Data Committee, the South Coast Region should focus on the following healthcare Occupations (incl. employment change from 2015 – 2025 and required education/training):</td>
</tr>
<tr>
<td>o Registered Nurse – 1570 (associates degree or higher)</td>
</tr>
</tbody>
</table>

**4/28/16 In Progress**

*Healthcare Committee will complete the analysis*

- to include percentages, and
- all PCT occupations by June 2016.
1.4. **Diversified Manufacturing Target Industries and Occupations**

- Achieve regional consensus on specific manufacturing industries and occupations for priority focus
- Obtain buy-in from all partners

- Per the Diversified Manufacturing Data Committee, the South Coast Region should focus on the following manufacturing **occupations**:
  - Aircraft Structure, Surfaces, Rigging, and Systems Assemblers
  - Inspectors, Testers, Sorters, Samplers, and Weighers
  - Team Assemblers
  - Computer-Controlled Machine Tool Operators, Metal and Plastic
  - Machinists
  - Aircraft Mechanics and Service Technicians
  - Industrial Machinery Mechanics
  - Heavy and Tractor-Trailer Truck Drivers
  - Purchasing Agents, Except Wholesale, Retail, and Farm Products
  - Production, Planning, and Expediting Clerks
  - Electrical and Electronic Equipment Assemblers
  - Industrial Engineering Technicians
  - Business Operations Specialists, All Other
  - First-Line Supervisors of Production and Operating Workers
  - Laborers and Freight, Stock, and Material Movers, Hand
  - Welders, Cutters, Solderers, and Brazers

4/28/16  
In Progress

*Manufacturing Committee will include*
- **numbers (and percentages)** for employment change from 2015 – 2025,
- **required education/training** (to back up decisions), and
- **analysis of focus industries, additionally to**
It was noted that some of the occupations listed in the manufacturing sector cross over into other sectors as well (e.g., construction trades) and need training programs to fill positions in multiple sectors. Therefore, the data team recommended obtaining the staffing patterns for the remaining sectors (IT, TDL, and Construction Trades) right away to be analyzed and fused with the existing recommendations.

Additionally, it is essential to cross-reference the manufacturing occupations chosen for priority focus with data used by the SC Department of Commerce.

| 2. Form Sector Partnerships: Convene, Partner, and Articulate Vision |
|---|---|---|---|
| **Goals** | **Strategies** | **Action Steps** | **Target Date** | **Status / Notes** |
| 2.1. Comprehensive Regional Planning Team | • Team is representative of all relevant workforce development partners and | • Discuss and update current team roster at Institute and in the following days | 4/15/16 | Completed |
|  |  | • Applicable existing team members will follow up with proposed new members/extend membership invitations |  |  |
|  |  | • Following the Institute, the roster was updated to include additional WP/ES, TANF, Econ. Dev., Corrections, and CATE representation |  |  |
| 2.2. Regional Vision | • Vision is reflective of the region’s demand-driven, sector-based approach to workforce development  
• Goals, strategies, and action steps are set according to the vision | • Discuss and develop vision at the 4/28/16 meeting  
• The draft vision is included on page 1 of the Sector Strategies and Talent Pipeline Planning Framework | 4/28/16 | In Progress |

| 2.3. Industry Focus Groups | • Focus groups will validate data utilized by planning team and provide additional non-data related industry intelligence | • Assigned team members will design lists of reputable employers and associations within target industries (Kim Statler – Diversified Manufacturing; Hank Amundson and Sharon Goss – Healthcare)  
• Once staffing patterns have been analyzed by committees and target sectors, industries, and jobs have been finalized (approved by full team), designated committee members will convene focus groups to obtain feedback and validation  
• See 3.2, Employer Validation of Target Sectors, Industries, and Occupations, for more information | TBD | Not Started |
### 3. Assess Employer-Defined Talent Needs

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategies</th>
<th>Action Steps</th>
<th>Target Date</th>
<th>Status / Notes</th>
</tr>
</thead>
</table>
| **3.1. Specific Industry Needs for Each Sector** | • Facilitate needs determination and ensure maximum details and accuracy in each sector’s needs analysis through dedicated committee work  
• Leverage all team members’ expertise regarding focus sectors | • Obtain staffing patterns for relevant industries in each focus sector from state data team (initially focus only on Diversified Manufacturing and Healthcare sectors)  
• Committees analyze their assigned sector’s staffing patterns  
• Committees develop proposals as to which industries (and jobs within each industry) should be included in the region’s sector strategies  
• Proposals are presented to the full team for consideration, feedback, and approval  
• Engage employers in conversations regarding the needs analyses for validation and to gather additional non-data related intelligence  
• Committees develop demand-driven plans/ frameworks to serve their respective target sectors | 4/28/16  
→ Team will set up a face-to-face meeting to cover this and create a tool for the focus group with the employers. | In Progress |
| **3.2. Employer Engagement** | • Employers are primary customers of the workforce system  
• Maintain ongoing open channels of communication | • Actively engage target sector employers who serve on the region’s two local workforce development boards  
• Develop working relationships with employers, as well as channels of communication and tools, that allow for a precise determination of employers’ needs:  
  o **Needs**: E.g., student/youth interns, Adult Ed participants, dislocated workers, full-time/part-time workers, assistance from SC Works and/or other workforce system partners, etc.  
  o **Benefits**: E.g., apprenticeships, OJT, etc.  
• Design means by which industry sector employers can validate training designs to ensure delivery meets the needs of the jobs | July/August 2016 | Not Started |
| **3.3. Employer Validation of Target Sectors, Industries** | • Ensure that employers are in agreement with data analyses and that there is no | • Diversified Manufacturing data and recommendations should be validated with the following entities:  
  o Ready SC  
  o SC Department of Commerce  
  o Charleston Regional Labor Analysis (Gap Analysis) | July 2016 | Not Started |
and Occupations information being overlooked
• Obtain employer buy-in and partnership

• Healthcare data and recommendations should be validated with the following entities:
  o Need to develop strategy for validating healthcare sector focus industries and occupations.

<table>
<thead>
<tr>
<th>Goals</th>
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</tr>
</thead>
</table>
| 4.1.  | Formation of Operations Committee | • This committee will primarily focus on how to operationalize job seeker/student and business services delivery  
  • Additionally, this committee will provide recommendations regarding the assessment, adjustment, improvement, and sustainability of the South Coast Region’s sector strategies | • Form data committees at the 4/28/16 meeting  
  • Committee members are as follows:  
    o Sharon Goss  
    o Bob Walker  
    o Amy Brennan  
    o Franklin Foster | 4/28/16 | Completed |
| 4.2.  | Rebranding and Marketing | • Team will be known as the convener of employers and the public through a solid regional strategic development plan  
  • Uniform message across all partner entities  
  • Transform the marketing message to adapt to the various target populations (e.g., youth, unemployed, individuals with disabilities, veterans, etc.) | • Design a plan to make workforce connections, connect apprenticeships, and conduct training and education  
  • Engage leadership in the 8-county region to:  
    o Market to employers first  
    o Market to client stakeholders/end-users second  
      • Students (k-12/college)  
      • Parents (to include parent education series on-site at business partner locations, community partners, and schools)  
      • Guidance Counselors  
      • Adult Ed  
      • Unemployed/Underemployed  
      • Veterans  
      • Etc. | November 2016 | Not Started |
<table>
<thead>
<tr>
<th></th>
<th>Create buy-in from key stakeholders for chosen target sectors, industries, and occupations</th>
<th>Design a plan to better align Individual Graduation Plans (IGP) with industry needs; this needs to be addressed with all school districts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overall target sector marketing plans must include messaging that</td>
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<tr>
<td></td>
<td>o Is proactive rather than reactive</td>
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<td></td>
<td>o Includes visual tools to show skills needed and the importance thereof</td>
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<td></td>
<td>o Is progressive, particularly when addressing Youth (changing career fairs)</td>
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<td></td>
<td>o Educates parents and educators, incl. curriculum development coordinators, CATE personnel, counselors, and administrators (possibly for CEUs for certificate renewal in order to make it more appealing)</td>
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<td></td>
<td>Survey healthcare providers to identify existing hiring best practices</td>
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<td></td>
<td>Suggested grassroots effort for communicating “the new message”:</td>
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<tr>
<td></td>
<td>o Service learning project under community development, which would develop soft skills and align with the SC Profile of Graduate</td>
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<td></td>
<td>o Pick a quadrant leader and get volunteers</td>
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<td></td>
<td>o Inform individuals on who to reach out to for each area</td>
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<td></td>
<td>o Share “the new message” door to door, similar to a political campaign</td>
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<td></td>
<td>o After you canvas, parallel marketing behind it (door hangers, etc.) with media (cable channel with ticker at the bottom, newspapers, etc.)</td>
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<tr>
<td></td>
<td>Design a marketing strategy to connect educators, students, and parents with apprenticeship fairs and opportunities</td>
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<tr>
<td></td>
<td>Apprenticeship marketing plans must clearly outline what is being offered in school districts and through work-study programs and who we can help connect with employers (it was suggested that the Berkeley County School District may be used as a model)</td>
<td></td>
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<tr>
<td></td>
<td>Suggested grassroots effort for marketing apprenticeships:</td>
<td></td>
</tr>
</tbody>
</table>
At the conclusion of each school year have one big event where all community and educational partners are present and invite K-12 stakeholders.

- Explain career pathways and apprenticeships
- Use social media options as well – meet students where they are and speak their language.

### 4.3. Common Language

<table>
<thead>
<tr>
<th>Goals</th>
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<th>Action Steps</th>
<th>Target Date</th>
<th>Status / Notes</th>
</tr>
</thead>
</table>
| 5.1. Talent Pipelines | • Ensure talent pipelines are understood and marketed by all partners equally | • Analyze target occupations to determine whether adequate training is available  
• Explore scalability of talent pipelines used by Berkeley County CATE (Tana Lee)  
• Engage in career pathway development efforts currently underway in connection with the SC Department of Education’s recent grant awards | TBD | Not Started  
Meeting in July to come up with talking points and a PPT that we can use as a training guide and use as common language. |
### 5.2. Staff Training
- Ensure all partners are “singing off of the same sheet of music”
- Ensure “board room to mail room” communication of sector strategies, career pathways, and talent pipelines
- Emphasize the “one knock approach” in business service delivery
- Ensure that business services teams are fully developed in each area
- Conduct quarterly regional business services team meetings to include training component to determine best practices in team direction
- Conduct bi-annual regional staff team meetings to include a training component to keep staff updated on the strategic plan and moving forward in professional development needs

### 5.3. Close Transportation Gap for Rural Areas
- Expand existing transportation resources
- Identify existing funding sources that may be of assistance
- Discuss options to close transportation gap with existing entities such as:
  - Charleston Area Regional Transportation Authority (CARTA)
  - Palmetto Breeze, formerly Lowcountry Regional Transportation Authority (LRTA)
  - TriCounty Link
  - Uber (affordability?)
  - Park & Ride
  - Catch-A-Ride
  - VA Model
- Identify funding sources

### 6. Assess, Adjust, Improve, and Sustain

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategies</th>
<th>Action Steps</th>
<th>Target Date</th>
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</tr>
</thead>
</table>
| 6.1. Continued Sector Strategy Development and Sustainability | Engagement, responsibility, and ownership | • South Coast Regional Sector Strategy Planning Team will meet quarterly to review progress, score outcomes, and make adjustments  
• Core team (Hank Amundson, Sharon Goss, Amy Brennan, Kim Statler, and Julie Kornahrens) will continue to engage, convene, and provide guidance and direction to all team members | Ongoing | In Progress |
### 6.2. Customer Satisfaction

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Expected Completion</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ensure ongoing industry partnerships through customer satisfaction</td>
<td></td>
<td>January 2018</td>
<td>Not Started</td>
</tr>
<tr>
<td>• Create an industry survey to track employer satisfaction</td>
<td></td>
<td></td>
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<tr>
<td>• Explore financial and other resources that may be contributed by partners</td>
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</table>

### 6.3. Reevaluation of Regional Target Sectors

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Expected Completion</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Reevaluate broad-picture data regularly, in order to ensure viability of sectors chosen for priority focus (incl. prioritization)</td>
<td></td>
<td>Four years after plan implementation.</td>
<td>n/a</td>
</tr>
<tr>
<td>• Continue to secure buy-in from all partners through the use of up-do-date data</td>
<td></td>
<td></td>
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<tr>
<td>• Request renewed ‘Analysis of South Coast Region Industry Clusters’ data report every four years</td>
<td></td>
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<tr>
<td>• Seek out up-to-date supplemental data such as updated versions of the ‘Charleston Region Talent Strategy’ report</td>
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<td></td>
<td></td>
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<tr>
<td>• Reconvene regional planning team for data analysis</td>
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### Additional Barriers

The following are long-term barriers that the South Coast Regional Sector Strategy Planning Team identified in the course of their planning work. They are recorded here for lawmakers and those who can affect change to effectively address them.

- **Stringent laws pertaining to background checks** are a severe barrier to employment for many individuals in the healthcare and manufacturing sectors. Legislation to remove misdemeanor and non-violent felony offenses that prohibit people from obtaining employment and other services (e.g., food stamps), particularly when offenses are farther than five years in the past, would create a stronger pathway to success for all.
- **The chronic lack of affordable and accessible childcare** is a barrier to employment for many individuals, particularly single mothers.
- **The lack of access to English Language Acquisition (ELA) courses** is a barrier that prevents many individuals from being able to obtain and retain even minimum wage jobs.
- There’s a chronic **lack of funding in K-12** to support exploratory classes and experiences such as apprenticeships, work experience, career pathway guidance, etc.

Team members are committed to being advocates, taking action, and using their combined leadership to address these important problems as opportunities arise. It is necessary to resolve these issues in order to ensure economic growth and stability in the region/state and effectively reduce the number of unemployed individuals.
### CENTRAL Regional Plan Framework

**Target Industry Cluster: Manufacturing**

### 1. Gather, Analyze, and Validate Workforce Data/Intelligence

<table>
<thead>
<tr>
<th>Priority Goals</th>
<th>Key Strategies</th>
<th>Potential Action Steps</th>
<th>Notes (additional needs, lead parties, timeframes, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>i. Identify Industry Position (needs/hiring/skills analysis)</td>
<td>1. Pull Data (Bubble chart update, LMI from State, LWDB data, CEDs data, Help Wanted data, Staffing Patterns)</td>
<td>1i. Determine data sets need</td>
<td>1i. Data Team 7/15/16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1ii. Collaborate with other team members</td>
<td>1ii. Data Team 8/1/16</td>
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<td>1iii. Reach out to State for data</td>
<td>1iii. Kevin 8/1/16</td>
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<td></td>
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<td>1iv. State response</td>
<td>1iv. State 9/1/16</td>
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<td></td>
<td></td>
<td>1v. Collect additional data not available</td>
<td>1v. Agency Partners 11/1/16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2i. Identify agencies</td>
<td>2i. Kevin lead w/ agencies 5/15/16</td>
</tr>
<tr>
<td></td>
<td>2. Create Regional Data Team</td>
<td>2ii. Invite specific people</td>
<td>2ii. 5/22/16</td>
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<td></td>
<td></td>
<td>2iii. Conduct first meeting</td>
<td>2iii. 6/15/16</td>
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<td></td>
<td></td>
<td>3i. Determine data set</td>
<td>3i. Data Chair 7/1/16</td>
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<td></td>
<td></td>
<td>3ii. Process data</td>
<td>3ii. Data Team 10/1/16</td>
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<td></td>
<td></td>
<td>3iii. Make recommendations to Regional Team</td>
<td>3iii. Data Team 11/1/16</td>
</tr>
<tr>
<td></td>
<td>3. Conduct Regional Data Team analysis</td>
<td>4i. Identify talent survey for P-20</td>
<td>4i. Data Team 8/15/16</td>
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<td></td>
<td></td>
<td>4ii. Get survey out</td>
<td>4ii. Kay 9/1/16</td>
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<td></td>
<td></td>
<td>4iii. Receive responses</td>
<td>4iii. Data Team 10/1/16</td>
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<td></td>
<td></td>
<td>4iv. Analyze responses</td>
<td>4iv. Data Team 12/15/16</td>
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<td></td>
<td>5i. Present results to Regional Team</td>
<td>5i. Data Team 1/15/17</td>
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<tr>
<td></td>
<td>4. Carry out a talent supply survey</td>
<td>5. Share with Regional Team recommendations</td>
<td></td>
</tr>
<tr>
<td>ii. Skills Gap Analysis</td>
<td>1. Pull Work Keys scores</td>
<td>1i. Extract the data</td>
<td>1i. Christy (AE) 6/1/16</td>
</tr>
</tbody>
</table>
| iii. Validate data from above with the business community | 1. Survey | 1i. Identify existing surveys 1ii. If not, develop one  
See ii. 3. above  
See 2.i.1-2. below  
4i. Invite leadership from existing partnerships/groups by champion  
4ii. Share data for validation | 1. Data Team 10/15/16  
1ii. Data Team 11/15/16  
See ii. 3. above  
See 2.i.1-2. Below  
4i. Kay & Freddie 9/1/16  
4ii. Employer Focus Groups 10/1-30/16 |
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<tbody>
<tr>
<td>2. Focus groups</td>
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<tr>
<td>3. Sector partnerships</td>
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<td></td>
<td></td>
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<tr>
<td>4. Convening of existing entities</td>
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</tbody>
</table>
| iv. Career Pathway Analysis | 1. Education continuum in region | See i.4.i-iv. Above  
2i. Convene Data Team and education representatives and conduct skills pathway analysis  
2. Review data and conduct wage pathway analysis | See i.4.i-iv. Above  
2i. Data Team 12/15/16  
3i. Data Team 12/15/16 |
| 2. Skills pathway analysis | | | |
| 3. Wage pathway analysis | | | |
| v. Regional workforce demographic | 1. Pull data (SC Works on-line system) | 1i. Determine set of demographics to pull 1ii. Request sent to State  
1iii. Response from State  
1iv. Review Results  
2i. Summarize results | 1. Data Team 7/15/16  
1ii. Kevin 8/1/16  
1iii. State 9/1/16  
1iiii. Data Team 9/15/16  
2i. Data Team 10/1/16  
3i. Regional Team 10/15/16 |
| 2. Data team crafts summary of results regarding workforce analysis | | | |
| 3. Share results with regional team | | | |
## 2. Form Sector Partnerships: Convene, Partner, and Articulate Vision

<table>
<thead>
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<th>Potential Action Steps</th>
<th>Notes (additional needs, lead parties, timeframes, etc.)</th>
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</thead>
<tbody>
<tr>
<td>i. Asset map existing manufacturing partnerships (what’s currently out there already in the community)</td>
<td>1. Each team member completes template for manufacturing responses</td>
<td>1i. Send out asset map template to Regional Team partners 1ii. Send responses to Christy (AE) 1iii. Compile responses 1iv. Send to Regional Team</td>
<td>1i. Andre 5/2/16 1ii. Regional Team 5/16/16 1iii. Christy (AE) 6/2/16 1iv. Christy (AE) 6/9/16 2i. Regional Team 6/29/30 2ii. Andre 6/30/16</td>
</tr>
<tr>
<td></td>
<td>2. Regional team refinement</td>
<td>2i. Review asset map 2ii. Convene Regional Team to review 2iii. Modify based on review</td>
<td></td>
</tr>
<tr>
<td>ii. Convene with core leadership (&quot;HR roundtables&quot;) in existing partnerships</td>
<td>1. Identify business champions/leaders with assistance from Chamber of Commerce 2. Convene core leadership in existing entities 3. Pull together invitation list (from Manufacturer Association) 4. Invitation and Agenda to be sent out 5. Assign facilitator with knowledge (subject matter expertise)</td>
<td>See 1.iii. above</td>
<td>See 1.iii. above</td>
</tr>
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<td></td>
<td>4i. Agreement upon a facilitator 4ii. Secure commitment for meetings</td>
<td>See 1.iii. above</td>
</tr>
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<td></td>
<td>Regional Team 10/1/16</td>
</tr>
<tr>
<td>iii. Reaching consensus on a regional vision</td>
<td>1. Convene Governing Group</td>
<td>1i. Determine who should serve on the Governing Group 1ii. Invite them to meeting</td>
<td>1i. Kay &amp; Freddie 12/1/16 1ii. Kay &amp; Freddie 12/15/16 1iii. Kay &amp; Freddie 12/15/16</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
<td>Timeline</td>
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<tr>
<td>2.</td>
<td>Business Champion shares needs identified</td>
<td>1. Develop an agenda for the meeting 1iv. Hold Meeting 2i. Secure the Business Champion to participate in the meeting 2ii. Presentation to Governing Group</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Develop vision</td>
<td>3i. Create the regional vision statement</td>
<td></td>
</tr>
<tr>
<td>iv. Set goals to support vision</td>
<td>1. Review vision 2. Identify 3-5 goals 3. Set key performance indicators (KPI)</td>
<td>1i. Regional Team reviews vision 2i. Regional Team reaches consensus on the goals 3i. Data Team identifies potential KPIs Regional Team reach consensus on the goals</td>
<td></td>
</tr>
<tr>
<td>v. Develop a communications and recruitment strategy</td>
<td>1. Meet with Manufacturing Assn. 2. Review Manufacturing Assn. communications and recruitment materials 3. Use in entirety if appropriate and Assn. agrees or modify as needed</td>
<td>1i. Set up meeting 2i. Walk through the existing campaign 3i. Fine tune as appropriate talking points, PPTs and outreach materials for key audiences, if needed 3ii. Identify businesses to recruit 3iii. Equip business team and business champions with materials 3iv. Targeted recruitment</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>1i. Kay 8/1/16 2i. Kay and agency partner communications staff 8/1/16 3i. Agency partner communications staff 8/31/16 3ii. Regional Team and Assn. 8/31/16 3iii. Communications staff 9/7/16 3iv. Team 9/7/19 on</td>
<td></td>
</tr>
</tbody>
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### 3. Assess Employer-Defined Talent Needs

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</thead>
<tbody>
<tr>
<td><strong>i. Conduct research</strong></td>
<td>1. Conduct additional research based on Employer Focus Groups 2. Share results with Regional Team</td>
<td>1i. Draw on national, state, regional and local resources as needed 2i. Summarize and report results</td>
<td>1i. Data Team 1/15/17 2i. Data Team 2/1/16</td>
</tr>
<tr>
<td><strong>ii. Encourage employers to develop skill based job opening descriptions</strong></td>
<td>1. Market idea with employers 2. Pull LMI data 3. Host an HR convening on the subject with SHRM</td>
<td>1i. Share concept with employers 2i. Access data that makes the business case for change 3i. Contact SHRM about idea 3ii. Determine date for event 3iii. Promote event 3i. Conduct event 4i. Request the State develop and deliver training and create job aid</td>
<td>1i. Mike (GW) 10-11/16 2i. Jeremy 10-11/16 3i. Mike (GW) 11/1/16 3ii. Mike/SHRM 11/15/16 3iii. Mike/SHRM 11/16-1/173 3iii. Mike/SHRM 1/17 4i. Andre 10/1/16 4ii. State 10-12/16 4iii. State/LWDBs 1/1-31/17</td>
</tr>
<tr>
<td><strong>iii. Employers review of curriculum maps for pathways</strong></td>
<td>1. Share with employers the skills pathways results 2. Ask employers or SMEs to provide feedback 3. Convene education continuum to share feedback 4. Education partners discuss the needed realignments</td>
<td>1i. Regional Team presents results to employers 2i. Provide feedback mechanism to employers 2ii. Gather feedback 2iii. Summarize feedback 3i. Invite education partners 4i. Discussion across the education partners</td>
<td>1i. Christy (AE) 1/15/17 2i. Jeremy 1/15/17 2ii. Jeremy 2/15/17 2iii. Jeremy 3/1/17 3i. Steve 3/7/17 4i. Mike A 3/7-5/1/17</td>
</tr>
</tbody>
</table>
iv. **Employers identify the appropriate certification and credentials**

<p>| | | | |</p>
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<thead>
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</thead>
<tbody>
<tr>
<td>1. Identify what is out there</td>
<td>2. Get employer feedback</td>
<td>3. Select or develop certificates, credentials and/or degrees</td>
<td>Need to address steps for 1-3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Need to address step leads and dates</td>
</tr>
</tbody>
</table>

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### 4. Develop Strategies and Align Resources

<table>
<thead>
<tr>
<th>Priority Goals</th>
<th>Key Strategies</th>
<th>Potential Action Steps</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>i. <strong>Create service delivery process flow chart</strong></td>
<td>1. Develop individual customer process flow</td>
<td>1i. Identify existing delivery process flow charts from partner agencies around individual customers. 1ii. Develop one generic from information gathered for individual customers.</td>
<td>1i. Christy will request flow chart from a representative from each partner by 1ii. Will take gathered information and create one flow chart to share with group</td>
</tr>
<tr>
<td></td>
<td>2. Develop business customer process flow</td>
<td>2i. Identify existing delivery process flow charts from partner agencies around business customers. 2ii. Develop one generic from information gathered for business customers.</td>
<td>2i. Christy will request flow chart from a representative from each partner 2ii. Will take gathered information and create one flow chart to share with group.</td>
</tr>
<tr>
<td>ii. <strong>Create roles and responsibilities of partners (to avoid “swim lanes”)</strong></td>
<td>1. Assess current state 2. Determine ideal state 3. Develop the plan to attain the ideal state</td>
<td>1i. Need steps to achieve 1. 2i. Need steps to achieve 2. 3i. Cross Training of agencies. 3ii. Compile resources into one document with agencies “elevator speech” (who we are and what we do)</td>
<td>1i. Need to address 2i. Need to address 3i. Andre will facilitate partners coming together for cross training activities by ???. 3ii. Need to address</td>
</tr>
</tbody>
</table>
iii. Determine who can pay for what

1. Ideal state discussed
   1i. Agency partners identify appropriate fiscal staff to invite to meeting
   1ii. Meet with fiscal staff of partner agencies to share the ideal state
   1iii. Determine opportunities to align resources

2. Assess what partners can pay for what
   2i. Discuss options

iv. Review procurement

1. Change procurement to support ideal state via:
   a. Target populations
   b. Sectors
   c. Performance expectations
   d. Funding model

1i. Based on Regional Vision, Goals and Ideal State, examine procurement process to support the objectives

1i. Ongoing by all the partners based on their individual procurement processes.

5. Operationalize in Job Seeker/Student and Business Service Delivery Business Services

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<tr>
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<th>Notes (additional needs, lead parties, timeframes, etc.)</th>
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</thead>
</table>
| i. Communication strategy for business services | 1. Determine universal services | 1i. Obtain CO’s business services marketing materials
1ii. Personalize to the Region | 1i. Andre 4/1/17
1i. Business facing staff for partner 5/1/17
2i. Business facing staff by 6/1/17
2ii. Communications staff 7/1/17
2iii. Agency partners 8/1/17
3i. Communications staff 9/1/17
4i. State or region 10/1/17
4ii. State or region 11/1/17 |
|                | 2. Develop common language around those universal services | 2i. Review CO’s materials
2ii. Adapt language
2iii. Retool service menu for businesses | |
<p>|                | 3. Create communication tools | 3i. Work with communication team to modify outreach materials | |</p>
<table>
<thead>
<tr>
<th></th>
<th>4. Train business service representatives</th>
<th>4.i. Develop training materials (state or region)</th>
<th>4.ii. Conduct training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>iii. Develop outreach message based on review of marketing materials and merging them</td>
<td>See 2.v. above</td>
<td>See 2.v. above</td>
<td>See 2.v. above</td>
</tr>
<tr>
<td>iv. Set our performance goals</td>
<td>1. Investigate leeway in state template</td>
<td>1. Understand what each partner wants to achieve in service delivery by working together in the region 1.i. Set common performance goals for the region 1.ii. Integrate services strategies and resource by partner agencies to obtain regional performance goals in MOU/RSA 1.iii. Receive and review KY template for additional strategies 1.iv. Train frontline staff on common service strategies and regional performance goals</td>
<td>1. Regional Team 1/1/17 1.ii. Regional Team 2/1/17 2.i. Partner Agencies 3/1/17 3.i. Andre 1/1/17 4.i. Regional Team 4/1/17 See 5.1.viii.</td>
</tr>
</tbody>
</table>
v. Update policies and procedures

<p>| | |</p>
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Share policies and procedures</td>
</tr>
<tr>
<td>2.</td>
<td>Evaluate in context of ideal state</td>
</tr>
<tr>
<td>3.</td>
<td>Address barriers</td>
</tr>
<tr>
<td>4.</td>
<td>Modify policies and procedures</td>
</tr>
<tr>
<td>5.</td>
<td>Consider regional policies</td>
</tr>
</tbody>
</table>

1. All partners share policies and procedures
2. Policy staff review in the context of the ideal state
3. Highlight barriers for Regional Team
4. Regional discussion on how to address barriers
4ii. Provide direction on modifying policies and procedures
4iii. Make appropriate changes
5. Adopt regional policies where appropriate

1i. Partner agencies 3/1/17
2i. Policy staff 4/1/17
3i. Policy staff 4/15/17
4i. Regional Team 5/1/17
4ii. Regional Team 6/1/17
4iii. Agency partners 7/1/17
5i. Regional Team 7/1/17

6. Assess, Adjust, Improve, and Sustain

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<tbody>
<tr>
<td>i. Understand new performance measures</td>
<td>1. Performance measures discussion</td>
<td>1i. Compile all performance criteria above and beyond what is required for WIOA. 2i. Schedule for next summer (WIOA performance should be available at that time)</td>
<td>1i. Entire Team 2i. Each organization provides their expected performance criteria</td>
</tr>
<tr>
<td>2. Training on measures</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>3. Develop job aids</td>
<td></td>
<td></td>
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<tr>
<td>ii. Obtain baseline data</td>
<td>1. Data Team reviews baseline data</td>
<td>1i. Engage SCDEW to provide Regional Data to establish vetted baseline data</td>
<td>1i. Andre will contact Business Intelligence at the state level to inquire.</td>
</tr>
<tr>
<td></td>
<td>2i. As yet, too many unknowns, will set meeting as performance both WIOA and each</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recommendations regarding targets to Regional Team</td>
<td>organization’s additional needs are concretely defined.</td>
<td>Information will be passed on to Data team members once Identified</td>
<td></td>
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<tr>
<td>---</td>
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<td></td>
</tr>
<tr>
<td>iii. Set targets</td>
<td>1. Negotiate targets</td>
<td>1i. Adult Ed negotiates performance every two years and Technical Colleges set their own and rely on WIA/WIOA performance. Looking to set some reasonable 1st year goals for the regional team</td>
<td></td>
</tr>
<tr>
<td>iv. Evaluate progress and performance</td>
<td>1. Analyze quarterly data</td>
<td>1i. Have data distributed to entire team for the sake of shared knowledge on a quarterly basis with a simplified report being generated. 2i. Data team generates annual report detailing performance outcomes to include (number of participants successfully placed, wages secured (pre and post), and specific job titles within Advanced manufacturing field.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Analyze annual data</td>
<td>1. Data team</td>
<td></td>
</tr>
<tr>
<td>v. Retool as needed</td>
<td>1. Discuss with State the possibility of regional performance reports for core partners</td>
<td>1i. See 6ii</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Develop predictive measures and interim measures</td>
<td>2i. WIA currently uses Federal “9090 Reports” to predict performance (will see if this is an option under WIOA as well as any other performance measures that are included for the team)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Track progress quarterly and annually</td>
<td>3i. Done through annually and quarterly reporting by Data team</td>
<td></td>
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<tr>
<td></td>
<td>4. Recommend course corrections</td>
<td>4i. Creation of monitoring tool for key metrics</td>
<td></td>
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<tr>
<td></td>
<td>5. Assess impact of changes</td>
<td>5i. Need to identify action steps</td>
<td></td>
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<td></td>
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<td>1i. Andre</td>
<td></td>
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<tr>
<td></td>
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<td>2i. Each organization</td>
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<td></td>
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<td>3i. Data team</td>
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<td></td>
<td></td>
<td>4i. Technical Colleges</td>
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<td></td>
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<td>5i. Need to identify responsible party</td>
<td></td>
</tr>
</tbody>
</table>
### PEE DEE Regional Plan Framework

#### Pee Dee Target Sectors

<table>
<thead>
<tr>
<th>Primary</th>
<th>Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare</td>
<td>Diversified Manufacturing Hospital</td>
</tr>
</tbody>
</table>

1. Gather, Analyze, and Validate Workforce Data/Intelligence

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategies</th>
<th>Action Steps</th>
<th>Target Date</th>
<th>Status / Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1. Regional Target Sectors</td>
<td>• Identify the specific health care occupations the region will focus on utilizing the health care specific data provided.</td>
<td>• Review Analysis of Pee Dee Region Industry Clusters data report.</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Validate the demand for the health care occupations targeted with employers.</td>
<td>• Review health care specific data to identify target occupations.</td>
<td></td>
<td>Identify target dates</td>
</tr>
<tr>
<td></td>
<td>• Map health career pathway to include targeted occupations.</td>
<td>• Review health care specific data reports submitted by partners to verify sectors selected.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Validate occupations and career pathway with assistance with technical college health care connections.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Identify additional data request from the state data team if needed.</td>
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<tr>
<td></td>
<td></td>
<td>• Present proposed health care occupations for priority focus to full team for consideration, feedback, and approval.</td>
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</tr>
</tbody>
</table>
1.2. Develop Workforce with the Skills to Meet Healthcare Employer Needs

- Determine need for increased training in the identified occupations.
- Validate employer satisfaction with the existing training offered in the target occupations offered in the region.
- Develop career pathway navigation tool to inform the public about the opportunities for health care and how to access opportunities for training and advancement in the region.
- Use attention-grabbing name involving health care for new collaboration and recruitment.
- Inventory existing training in the target health care occupations in the region.
- Validate employer satisfaction with current training in the region and address technical and essential skills need as voiced by employers.
- Build partnership with colleges and health care organizations with existing training programs.
- Validate training providers from hospital perspective (how can we improve workforce?).
- Identify hospital associations
- Utilize college connections to meet with healthcare employers

2. Form Sector Partnerships: Convene, Partner, and Articulate Vision

<table>
<thead>
<tr>
<th>Goals</th>
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</thead>
</table>
| 2.1. Comprehensive Regional Planning Team | • The planning team of 28 members representative of all relevant workforce development partners across the region and plans are in place to maintain a comprehensive regional planning framework that can be duplicated for other sectors.  
• Team includes representatives from agencies that serve individuals with barriers to employment and will ensure the target occupations provide pathways for the individuals with barriers. | • The team is open to adding new members as needed but will continue with regional planning to keep the current momentum.  
• Updated team roster was presented to the full team at the face-to-face meeting for consideration, feedback, and approval. The roster was approved. | Open and continuous | In progress |
| 2.2. Regional Vision | • Vision is reflective of the region’s demand-driven, sector-based approach to workforce development.  
• Goals, strategies, and action steps are set according to the vision. | • The team approved the vision established on 4/15/16.  
• Vision: Establish the region as the “go-to” structure for all workforce needs. | 5/3/16 | Team reviewed and approved |
2.3. Healthcare Sector-Specific Planning Workgroup

- The workgroup will provide detailed analyses and recommendations regarding the specific targeted health care occupations approved by the planning team.
- Identify work group members.
- Connect to the health care employers via the technical college established relationship.
- Coordinate an employee focus group with health care organizations already in existing relationship with technical college.

2.4. Industry Focus Groups

- Focus groups will validate the targeted occupations selected with employers.
- Validate occupation demand and training needs.
- Identify employer pain points.
- Workgroup will identify a lists of reputable employers within the health care industry leveraging partnership already established with technical colleges and other partners.
- Identify the employers to be invited.
- Identify the date of the focus group.
- Coordinate the focus group.

3. Assess Employer-Defined Talent Needs

<table>
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</thead>
</table>
| 3.1. Determine Healthcare Industry Needs | - Validate industry needs with employers and identify skill set outside of listed credentials that employers want/need.  
- Meet the talent needs of healthcare industry and develop a framework for a career pathway navigation tool. | - Engage employers in conversations regarding the needs analysis for validation and to gather additional non-data related intelligence.  
- The workgroup will develop demand-driven plans to serve the health care sectors.  
- The health care workgroup will develop a proposal after the focus group and present to the full team for consideration, feedback, and approval.  
- The full team will develop specific service plans/frameworks for consideration, feedback, and approval. | In progress | Identify target dates for each action step          |
### 4. Develop Strategies and Align Resources

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</tr>
</thead>
<tbody>
<tr>
<td><strong>4.1 Aligning Business Services, Training, and Resources across the Region</strong></td>
<td></td>
<td></td>
<td></td>
<td>Identify dates for each action step</td>
</tr>
<tr>
<td>- Maximize the existing CRM capabilities of the current state system across agencies to reduce duplication and leverage resources for business engagement.</td>
<td>• Research the restrictions of the current state system with CRM capabilities and gain approval to provide access to all partners on the planning team.</td>
<td>• If approved by the state, provide partners access and training for the effective use of the CRM system.</td>
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</tr>
<tr>
<td>- Develop a regional business services strategy that includes cross-agency marketing materials, business services staff monthly meetings, and coordination of business engagement meetings among technical colleges, One-Stops, and Wagner-Peyser.</td>
<td>• Develop a protocol for use of the system by all business services staff and leadership.</td>
<td>• Cross-train across agencies.</td>
<td></td>
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</tr>
<tr>
<td>- Develop a regional training strategy around the targeted occupations.</td>
<td>• Expand the existing business services toolkit.</td>
<td>• Contact the state about effective data sharing and case management system integration.</td>
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<td></td>
</tr>
<tr>
<td>- Develop an education and training continuum across the region.</td>
<td>• Review each partner’s training investments in past year in the targeted occupations.</td>
<td>• Determine the training investment for the targeted healthcare occupations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Identify points to consolidate resources to avoid duplication and utilize strengths from other areas (coordinate training).</td>
<td>• Assess the potential skills pathway across the region.</td>
<td>• Conduct wage pathway analysis.</td>
<td></td>
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</tr>
<tr>
<td>- Leverage employer needs information.</td>
<td>• Technical colleges will share state blast of employer needs.</td>
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</tbody>
</table>
5. **Operationalize in Job Seeker/Student and Business Service Delivery**

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</table>
| 5.1 Regional Job Seeker Service Delivery | • Develop holistic intake process across agencies.  
• Professional development on partner services.  
• Develop outreach message based on review of marketing materials and merging them.  
• Establish performance goals. | • Review current agency and local area intake process.  
• Develop customer flow process to facilitate access to health care target occupations.  
• Establish roles and responsibilities of partners to reduce duplication, sustain partnership and coordinate service delivery.  
• Review policies to ensure alignment with new regional plan. | TBD |  |
| 5.2 Regional Business Services | • Integrate and unify business services approach.  
• Communication strategy for business services. | • Expand current best practices across the region.  
• Expand the business services toolkit.  
• Develop plan to coordinate job fairs and recruitment efforts across the region.  
• Utilize current CRM system to coordinate business services strategies. | TBD |  |

6. **Assess, Adjust, Improve, and Sustain**

<table>
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</tr>
</thead>
</table>
| 6.1 Maintain Long-Term Regional Planning Team | • Acknowledge “team wins”/celebrate as a collaborative.  
• Build in collaboration measurements.  
• Maintain trust and collaboration by creating “win-win” for all partners.  
• Develop a regional data strategy.  
• Maintain monthly meeting with leadership.  
• Establish monthly business services meeting with business services staff. | • Develop leadership team.  
• Develop workforce groups.  
• Develop regional communication strategy.  
• Develop regional planning and operating agreement.  
• Develop a cross-region data team. | TBD |  |
### UPSTATE Regional Plan Framework

#### Target Industry Cluster: Diversified Manufacturing

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</table>
| Develop a Data Team across Partners | • Reach out/recruit from key partners, such as Economic Development  
• Each partner use their own network to identify and reach out to needed team members  
• Validate with employers what information is most beneficial and what services/training the regional partners can provide | • Develop a list of data FAQs across partners to help team identify the types of data most in need and reach consensus on the definitions and elements considered –helps build a data collaborative for the region  
• Creating surveys and working with HR community. Providing a series of workshops and trainings to provide labor market information. | *Team responsible for data gathering; multi-partner consensus-based decision-making model  
*Moving Manufacturing subgroups out of other industry clusters such as Business Services, Textiles, IT Manufacturing, Metal Fabricating, Rubber and Chemicals, and Food Processing to create Diversified Manufacturing cluster  
*Video of this workgroup’s latest planning session report-out available [HERE](#)  
*Team will work in next session to build out lead parties, timeframes, and action steps |
2. Form Sector Partnerships: Convene, Partner, and Articulate Vision

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</tr>
</thead>
</table>
| Convene Regional Partners in Diversified Manufacturing Regional Launch Meeting | • Ensure follow-up meetings for regional partnership meetings continue  
• Get buy-in and understand needs from employers  
• Solicit feedback | • At next team meeting, develop agenda and panel of employers for regional launch meeting  
• Develop needs assessment for employers  
• Collect needs assessment from Department of Commerce | |
| Be More Inclusive of Pulling Partners Together | • Everyone take responsibility for identifying key partners needed at the table and outreach to them  
• Reach out to faith-based community to align resources and strategies | • Develop new partner orientation manual, including: overview of project, timeline, previous meeting materials, most updated version of the SWOT analysis and regional planning matrix | *Video of the workgroup’s latest planning session report-out available [HERE](#)  
*Team will work in next session to build out lead parties, timeframes, and action steps |

3. Assess Employer-Defined Talent Needs

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</table>
| Understand Business/Industry Needs | • Get feedback from business  
• Understand/push use of SCMC | • Speak w/ managers and line leaders for feedback on needs | |
| Collaborate with Community College to Align Curriculum | Evaluate curriculum to ensure it meets business needs | | |
### 4. Develop Strategies and Align Resources

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| **Understand York Education Model as Example of Sector Partnership that Works** | • Evaluate key factors that make partnership work  
• Increase awareness and strengthen other partnerships  
• Take these models to scale across the region | • Organize partners’ team to go visit/evaluate this site | *Video of this workgroup’s latest session report-out available [HERE](#)  
*Team will work in next session to build out lead parties, timeframes, and action steps |
| **Understand Greenville Workforce Partnership with Michelin as Example of Sector Partnership that Works** | • Evaluate key factors that make partnership work  
• Increase awareness and strengthen other partnerships  
• Take these models to scale across the region | • Organize partners’ team to go visit/evaluate this site | *April 28th: As part of next team meeting, arrange to tour Michelin Career Center (completed) |
| **Engage Chambers and Existing Industry Partnerships**                       | • Listen to employers to understand what they need and why they need it          |                                                                                         |                                                                                           |
| **Work with Guidance Counselors to Engage Them in Manufacturing Industry Opportunities:** | • Expose guidance counselors to manufacturing (site visits, externships, manufacturers engage in activities at local schools) |                                                                                         |                                                                                           |
5. Operationalize in Job Seeker/Student and Business Service Delivery

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<tr>
<td>Address Generational Barriers between Emerging Workforce and Manufacturing Jobs</td>
<td>• Identify different generations in the manufacturing workforce and identify key characteristics that might present barriers</td>
<td>• Offering training and classes to businesses to help them weigh their competitive advantages of modifying for millennials</td>
<td>*Video of this workgroup’s latest planning session report-out available <a href="#">HERE</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>*Team will work in next session to build out lead parties, timeframes, and action steps</td>
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