Ascend

Talent Pipeline Replication Toolkit

Compiled by: Ascend Indiana

With support from: Richard M. Fairbanks Foundation

Date: 2020

INTRODUCTION

Purpose

The purpose of the Talent Pipeline Replication Toolkit is to enable employers, education partners, and community-based organizations to scope, design, and launch robust work-based learning programs to close talent gaps and strengthen the local workforce. In the current job landscape, there is a misalignment between the supply of and demand for talent. While there are several work-based learning initiatives and approaches, this toolkit provides a model, including critical steps and key players, that can be utilized by a variety of stakeholders to build a talent pipeline program.

Methodology

Context

Progress toward increasing postsecondary attainment levels in Indiana is too slow to keep up with escalating demand. Today, there are not enough students concentrating in high-demand fields, conducting work-based learning opportunities, and completing credentials. This leads to an insufficient supply of talent to meet workforce needs, particularly in the advanced sectors of the economy. Through conversations with companies in high-growth fields, it is clear that there is a need for more aligned educational training programs and enhanced connective tissue among employers, higher education, and students.

A talent pipeline is a workforce development strategy which aims to continuously attract and recruit qualified and appropriately skilled individuals to fill roles at an organization through a defined partnership with one or more education institutions. A successful talent pipeline can have significant benefits not only for an organization, but also for students, job seekers, and educational institutions. Ascend developed this structured methodology for building a talent pipeline as a response to this insufficient supply of talent in order to support partnerships throughout the state that will align workforce supply and demand and create good and promising career opportunities for students.

Key Learnings

After developing successful talent pipeline programs alongside key Indiana employers and education institutions, Ascend has recognized some high-level key learnings:

1. Internal business alignment is paramount to the successful implementation and launch of the talent program.
2. Identifying the correct stakeholders to engage and facilitating outcome-driven engagement is critical.
3. Flexibility and adaptability should be built into the program to accommodate the dynamic nature of business and education.

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REPLICATION TOOLKIT OVERVIEW

The Replication Toolkit outlines a structured approach to developing a work-based learning program alongside an education partner. To do so, this guide is organized around the four major phases of talent pipeline development: **Discover**, **Identify and Secure**, **Design**, and **Launch**. Within each section of the toolkit, the phases are broken down further into the tactical steps for successfully completing each phase. Accompanying each of the steps are detailed descriptions of the strategic approach and key learnings. Included in the appendix are a series of tools and templates for each phase to facilitate implementation.

Included below is a brief description of each phase to provide context and introduce key terminology.

DISCOVER

The ***Discover*** phase involves exploring the talent need that the work-based training program aims to solve. **By determining the current talent gap, you will be able to scope the project and define the program foundation, including vision, mission, and program model.** This guide shows you how to identify the talent need, quantify supply and demand, determine misalignment, draft project goals, convene a project team, and conduct a stakeholder analysis.

IDENTIFY + SECURE

The ***Identify + Secure*** phase builds on the Discover phase by utilizing the project goals to select one or more education partners. **Because the education partner is a key stakeholder in the success of the work-based training program, Identify + Secure involves identifying key knowledge, skills, and abilities (KSAs) for the role and engaging in a rigorous process for identifying, evaluating, and selecting a partner.** The toolkit assists you in engaging prospective education partners, completing education partner interviews, developing a Partner Assessment Report to evaluate each partner's alignment to the criteria, selecting a partner, and signing a Memorandum of Understanding to build a program.

DESIGN

The *Design* phase involves developing the key components of the work-based training program alongside the education partner. Now that the talent gap, KSAs needed for the role, and strong education partner have been determined, the program can be strategically designed with the support of the education institution. This section of the toolkit supports you in defining the priorities and structure of the program, creating quantifiable outcomes, developing strategies, drafting the strategic plan, and finalizing the partner agreement.

LAUNCH

The ***Launch*** phase involves setting the strategic plan in motion, ensuring partners are prepared, and communicating the program with the public. **As such, this phase results in an external communications plan, change impact assessment, and positive media coverage.** The toolkit guides the team in determining the scope of the launch plan, aligning with the education partner on a communications strategy, and identifying change management implications and strategies.

DISCOVER

Summary

The Discover phase is foundational to the process of developing a robust talent pipeline. The purpose of the Discover phase is to clarify which role(s) to address with the talent strategy and outline a path forward on the project. The Discover phase is critical for building a universal understanding of who will be leading the project, gathering key landscape information of the role(s), and determining overall project goals.

Approach

The Discover phase is characterized by a set of internal meetings with the newly-created project team. The project team completes the following three key activities:

1 Define Project Governance Structure

- Create a project team
- Conduct a stakeholder analysis

2 Conduct Talent Analysis

- Identify the talent need
- Quantify the supply and demand
- Determine the misalignment and causes

3 Define Project Outcomes

- Engage relevant stakeholders
- Develop overarching project outcomes
- Determine talent goals

Outcomes

- Identify a role or set of roles that are difficult to fill, high-volume, and/or critical to business success
- Define the cause(s) for the misalignment between the demand for the role and the supply of talent
- Develop **Program Case** including goals, an initial program model, and a timeline

1 Define Project Governance Structure

An informed project governance structure can be developed based on the findings from the comprehensive talent analysis. This includes forming a project team and conducting a stakeholder analysis, outlined in detail below:

Create a core project team

Source From:

- Department or division which will implement the talent project
- Program operations and management
- Human resources
- Executive Leadership team

Roles + Responsibilities:

- Drive progress forward
- Make key decisions
- Own responsibility for the overall success of the project

Conduct a stakeholder analysis

- Core project team to determine additional key stakeholders for project

Selection:

- Outline the project phases
- List stakeholders needed to validate the critical decision points in each phase

2 Conduct Talent Analysis

Conducting a talent analysis will clarify details about the role that are critical to building a well-informed talent pipeline program. This includes identifying the talent need, defining the existing supply and demand for the role, determining the talent misalignment, and recognizing the causes of the specific talent deficit. The key components of this step are outlined on the next page.

Identify the talent need

Utilize the following key questions to guide the project team in identifying your organization's specific talent needs and which role(s) to include within a talent pipeline.

Questions to consider

1. What role(s) is experiencing high rates of turnover?
2. Is there a role that has a recurring need for new talent?
3. What is the impact on the services or products that the organization provides if this role continues experiencing a shortage of qualified talent?
4. How urgent is the organization's need for addressing this talent shortage?

Once the talent need is clear, the project team is ready to begin investigating specific factors that contribute to the talent shortage.

Quantify the supply and demand

To inform project goals and strategies, it is important to understand the demand and supply of talent as it relates to the identified role(s). Therefore, the project team should assess the current national, local, and organizational demand and supply for the specified role(s).

Supply

To understand the relevant supply of talent, consider the **number of available workers** to fill the jobs, as well as the **characteristics and competencies of available workers**. The questions below can help clarify the necessary skills and preparation for this role(s).

Questions to consider

1. What are the essential functions and skills necessary to perform in the role(s)?
2. Are there any required or desired credentials/degrees that individuals need to perform this role(s) well?

Demand

The demand for this role(s) is characterized by the **number of current and projected jobs available**, the **projected rate of job growth**, and the **average annual salary**. Use the questions to the right to help further assess demand for the role(s).

Resources to Assess Supply and Demand

There are many resources available that provide insights into the organization-specific and broader supply and demand. The table below outlines some helpful resources and a description of each.

Questions to consider

1. What is the average annual wage for individuals within this role(s)?
2. How is this role projected to grow in the future (nationally, locally, organizationally)?
3. How many people do we currently have in this position(s)?
4. How many people do we need to recruit to ensure that our organization or department operates at the highest level?

Resource	Description
U.S. Bureau of Labor Statistics	Essential job summaries, salary ranges, projected job outlook, and information on related or similar positions
careeronestop	Information similar to Bureau of Labor Statistics, but is tailored to state and local job information
o*net	Provides benchmark of wages and education across standard occupational codes
HR Department	Your HR department is an invaluable partner in providing critical insights into the makeup of the current talent supply and role requirements

Determine the misalignment and causes

After quantifying the specific supply and demand for the role(s), **the project team should identify the specific causes of the talent shortage and/or recurring need**. This will inform the key solutions and strategies that will be utilized to build and implement the talent pipeline program.

3 Define Project Outcomes

The last step of the Discover phase requires the project team to clearly define project outcomes. This requires engaging relevant stakeholders and developing overarching project goals with their input, as outlined below.

Engage relevant stakeholders

The project team should identify key stakeholders within the organization that need to be part of the process of defining the high-level project outcomes. This may include stakeholders with the relevant knowledge and skill-set for the process, or those with key decision-making and approval power. Once these stakeholders are identified, the project team should engage them strategically throughout the project.

Develop overarching project outcomes

The project team should engage with the identified stakeholders to draft the outcomes of the talent pipeline project. **The program outcomes should be simple, measurable, and achievable for the project team to accomplish during the specified time frame.**

Determine talent goals

Following the identification of program outcomes, the project team should **set overall talent goals, which include the number of individuals that the program aims to prepare for the specified role(s) on an annual basis.**

Create a Program Case

The core project team, talent misalignment, and program goals should then be translated into an initial talent model, called a Program Case. The Program Case includes the overall vision and mission statement for the talent pipeline project. The vision will convey the desired future state for your organization, while the mission explains how the program will help achieve that vision. In addition, the Program Case outlines which audience(s) will be targeted as the potential talent pool, the education and/or work experience individuals participating in the pipeline would experience, as well as the expected timeline of the project.

Discover Phase Key Learnings

- **Creating internal alignment** around the scope, goals, and path forward is critical to the success of the project.
- **Ensure all relevant stakeholders** have been engaged and that you have received approvals from the necessary stakeholders.
- **A talent pipeline project** is ideal for roles that have urgent talent needs, are difficult to secure talent for, and/or need to be filled on a large scale.

Path Forward

The Discover phase creates a strong foundation and understanding from which to build the talent pipeline. The Discover phase includes defining the project governance structure, conducting a talent analysis, and defining overall project goals. By identifying the talent misalignment and the contributing causes early in the talent pipeline development process, the project team will be well-positioned to identify a partner with which to build viable solutions.

IDENTIFY + SECURE

Summary

The purpose of the Identify and Secure (I+S) phase is to establish a formal partnership with an education institution that will work alongside your organization to design the talent program. Through this phase, you will select an education partner(s) that will provide the expertise, infrastructure, leadership, and brand name upon which the talent pipeline is built. Once the education partner is on board, the team is ready to begin the Design process.

Approach

The Identify and Secure phase is characterized by a series of internal meetings to align on evaluation criteria for potential education partners and a series of external meetings to conduct outreach and interviews with interested education institutions. The approach for the I+S phase involves three key activities:

1 Identify KSAs + Evaluation Criteria

- Identify knowledge, skills and abilities
- Develop criteria to evaluate education institutions

2 Engage + Evaluate Education Institutions

- Draft Request for Information (RFI)
- Identify and conduct outreach to potential education institutions

3 Select Education Partner

- Interview interested education partners
- Draft Partner Assessment Report to evaluate potential partners
- Select education partner and sign a Memorandum of Understanding

Outcomes

- Engage prospective education partners to share the talent need, define the program goals, and gauge interest
- Complete education partner interviews and develop a **Partner Assessment Report** evaluating each partner's alignment to the criteria
- Select a partner and sign a **Memorandum of Understanding** agreeing to build a program

Identify Knowledge, Skills, and Abilities + Evaluation Criteria

Identify Knowledge, Skills, and Abilities

Before selecting an education partner, the project team will first identify the knowledge, skills, and abilities (KSAs) that are critical to an individual's success in the target role of the talent pipeline. In addition to determining the appropriate KSAs, you will assign each a priority level (high, medium, low) that will not only allow your organization to identify potential education partners, but also effectively communicate the desired learning outcomes to them.

To draft the most accurate KSAs, be sure to involve stakeholders that are able to identify the key responsibilities for the role. This may involve individuals outside of the core project team. Follow the process below to draft KSAs as a team.

Process + Key Questions

Identify current activities and responsibilities for the position

- What are the standard daily activities for the position?
- What irregular activities might this position be asked to complete?
- Are there projects or requirements that might arise on short notice?

Identify future activities and responsibilities for the position

- Are there additional activities or responsibilities that will arise in the future?
- How will technological advancements influence the required skill set?
- Are there any activities or responsibilities that will no longer be needed?

Facilitate brainstorming activity

- Identify the KSAs needed for each role
- What are the key learning outcomes of each KSA?
- What is the priority level of each KSA? (high, medium, low)

Below is an example table identifying KSAs, learning outcomes, and priority levels for a scientific role. Use this table as a template as you build out your own list.

Sample KSAs		
KSA	**Outcomes**	**Priority**
Physics	• Hardware and troubleshooting activities • Basics of fluidity principles	**High**
Electronics and circuitry	• Basics of electronic principles • Circuit board troubleshooting skills • AC/DC circuits	**Medium**
Code and regulations	• Basic quality control standards and techniques • Understanding of regulatory agencies • Federal/State laboratory compliance	**Low**

Develop criteria to evaluate education institutions

After drafting KSAs, the core project team will translate them into evaluation criteria for potential education partners. These evaluation criteria will form a rubric to effectively evaluate potential education partners and inform corresponding scoring, which will support selection discussions.

The **evaluation criteria should align with the desired KSAs and include additional criteria related to each education institution's to infrastructure and academics**, such as coursework, faculty, finances, location, and programs of study.

Once the team has completed the list of criteria, the next step is assigning a priority level to each one (high, medium, low). The priority levels can then be used to calculate a rating for each potential education partner.

Included below is a sample set of criteria organized by category, each with an assigned priority level.

Tips for Drafting Assessment Criteria

Be comprehensive

Establishing comprehensive criteria is critical to accurately scoring each potential partner and drafting a meaningful partner assessment report to inform selection.

Gather input

It is critical to gather input from various stakeholders within the organization, especially the individuals who will be working closest with the education partner.

Review

Review the criteria and remove, add, or edit them as the team sees fit.

Sample Education Partner Criteria

Category	Criteria	Priority Level
Coursework	Course offerings within science, math, and engineering (i.e. troubleshooting, lab experience)	**High**
	Flexibility in degree path structure (i.e. opportunities for co-op experiences)	**High**
Faculty/ Administration	Faculty with industry experience	**High**
	Administration investment in pipeline development	**Medium**
Financial	Amount of debt the average biotech/biochem/ bioengineering student has upon graduation	**Medium**
	Cost of attendance	**High**
Location/Facilities	Geographic location/proximity to organization	**Medium**
	Has laboratory facility for hands-on teaching opportunities	**High**
Program Characteristics	Program's national ranking	**Low**
	Number of enrolled students/student capacity	**Medium**

2 Engage and Evaluate Education Institutions

Draft Request for Information

While not a mandatory step in the partner selection process, drafting a Request for Information (RFI) is a best practice for communicating the vision of the program with potential education partners and soliciting proposals. **An RFI provides an overview of the project, describes the process for education partner selection, and outlines the application requirement for interested institutions.**

Identify and conduct outreach to potential education partners

The next step is identifying potential education partners and conducting outreach to those institutions. The project team will **conduct research to identify potential education partners that might be a good fit for the program.** The partner evaluation criteria can be utilized to guide the research and ensure targeted education institutions offer programs and courses that align with the desired KSAs.

After compiling research on potential education partners, **convene the project team to review the list of education institutions.** This will allow the team to eliminate certain institutions that do not meet the baseline criteria and identify what additional information is needed about potential partners before conducting outreach.

Once the RFI is drafted and target institutions have been identified, **it is recommended to send the RFI directly to these education partners and request an introductory meeting**. Introductory meetings allow your organization to notify top programs of the talent pipeline project, establish an early relationship, and communicate what your organization is looking for in the proposal.

3 Select Education Partner

Interview interested education partners

The interview process is a key step in selecting a partner. **The interview enables your organization to further evaluate if an education partner is a good fit and establish the foundation of a working relationship.** Typically, the interview process is time-intensive, as it will require scheduling meetings with potential partners and is dependent on the availability of the key stakeholders involved.

The interview is a chance to ask strategic questions that build off of the institution's response to the RFI and gather necessary information for a final partner assessment. **Questions should focus on the criteria laid out in the RFI.**

In addition to asking tactical questions, the interview is also an opportunity to sell the potential partner on your talent pipeline. Education institutions will ask questions and want assurance that the partnership is worth pursuing. Emphasizing the vision and mission of the program as well as the benefits for both students and the education institution will ensure you present your program effectively.

Draft Partner Assessment Report to evaluate potential partners

Once all potential partners have been interviewed and the necessary information collected, draft a Partner Assessment Report to evaluate each potential partner against the evaluation criteria. The Partner Assessment Report clearly lays out the argument for each potential partner and guides decision-making.

The Partner Assessment Report includes a summary of strengths and weaknesses for each education institution, which will help the project team compare potential partners. We recommend creating a summary for each potential partner.

In addition, the Partner Assessment Report includes a rigorous scoring system. Rate each potential partner on a scale from 0-2 (0=not aligned, 1=somewhat aligned, 2=fully aligned) for each of the evaluation criteria, and then add up the total score for each education institution. **Once you finalize the scores, calculate a percentage (out of the total possible points) and categorize each partner into one of three categories: poor fit (<50%), potential fit (50-75%), or strong fit (75-100%).** For example, if the total possible points is 120 and a potential partner scored 92, then they would be rated at 92/120 (76%) and would be categorized as a strong fit.

Select education partner and sign Memorandum of Understanding (MOU)

With a comprehensive Partner Assessment Report drafted, your organization is now well-positioned to make the final education partner selection. It is important to make the decision holistically, taking into account the education institution's scores, interviews, and overall fit with the program. Evidence of a strong working relationship with the education partner should also factor into the decision.

Once an education partner is selected, your organization should complete the following action steps to formalize a relationship through an MOU. Refer to the appendix for an example of a finalized MOU.

Meeting for the MOU

- Relevant parties meet to discuss commitments and outline the parameters of the document.
- Include key stakeholders from each organization involved in the partnership as well as upper-level leadership, if necessary.
- Be fully transparent and ensure that both parties are aligned on expectations.

Finalize MOU

- Following the MOU meeting, draft the MOU and send it to the education partner for review.
- Once both parties approve, necessary stakeholders should sign the document and enact the partnership.

What is an MOU?

- The MOU is a legal document that outlines the scope and expectations of the partnership between your organization and the education partner.
- A major component of the MOU includes clear and tangible commitments of each party in the partnership.
- The purpose of the MOU is to hold each party accountable throughout the partnership.

Identify + Secure Phase Key Learnings

Selecting a partner who is excited about the project and who can support your organization in realizing the vision and mission is critical for the construction and longevity of the program.

Drafting and sending an RFI directly to targeted education institutions will increase the likelihood of responses from those institutions and demonstrate to them how interested you are in their partnership.

Distributing the RFI broadly to education institutions will yield responses from institutions outside of your immediate network.

Path Forward

The Identify + Secure phase results in the selection of an education partner that is aligned to the vision, mission, and criteria created for the talent pipeline. It is crucial to solidify this partnership with a formal, written agreement (MOU), which will create the foundation for a clear and positive working relationship. Moving forward, the project team will begin designing the talent pipeline alongside the education partner.

DESIGN

Summary

The Design phase is essential to building the framework for a successful program alongside the selected education partner. Upon completion of the Design phase, each of the components of the talent pipeline will be setup, and the project team will be prepared to begin the Launch phase.

Approach

This phase is characterized by a series of meetings conducted internally with the project team and/or alongside the education partner in order to determine the goals and strategies for the program. The structured process for the Design phase includes three key activities:

1 Define Priorities + Structure

- Determine key priority areas

2 Develop a Guiding Structure

- Create quantifiable outcomes
- Develop supporting strategies and tactics
- Identify owners to execute goals and strategies

3 Finalize Program Plan

- Draft program deliverables
- Finalize partner agreement

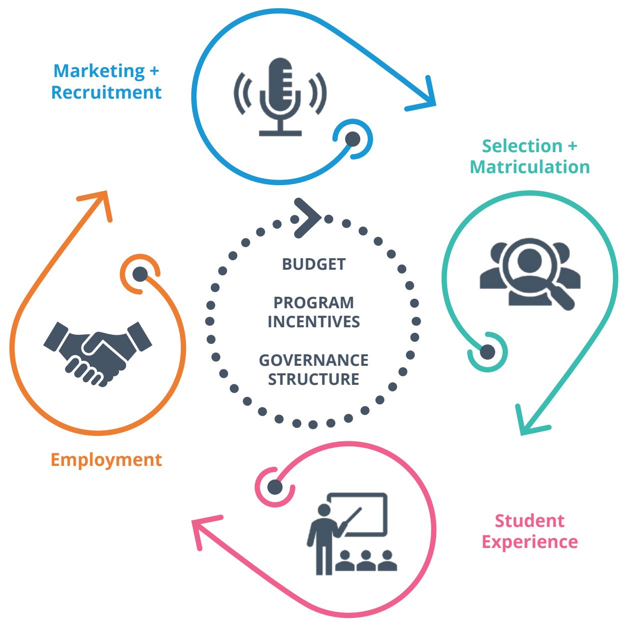
Outcomes

- Convene key stakeholders to define priorities, goals, strategies, and owners
- Document a **Strategic Plan** and socialize with partners
- Develop a **Dashboard** to track progress against identified goals and timelines

Define Priorities and Structure

Determine key priority areas

First, the project team should align internally to determine the key priority areas that will define the structure of the talent pipeline program. The figure to the right depicts a potential structure that could be used to build a talent pipeline.



Using this structure, the key priority areas the project team will design are: Employment, Student Experience, Selection and Matriculation, and Marketing and Recruitment. This visual shows these key priorities, as well as the supporting priorities (budget, program incentives, and governance structure) that run throughout the whole project.

Each priority area is described below.

Selection and Matriculation

This priority area encompasses the process of applying for the program, selecting program candidates, and maintaining engagement and involvement by program participants.

Student Experience

Student experience activities are the foundation of the talent pipeline program. They include work-based experiences, a curriculum path, and social experiences for each cohort.

Work-based experiences (WBE) include any work components that students complete during the student experience, including internships, co-ops, or other forms of on-the-job learning.

The **curriculum** includes the courses that the employer and the education partner identify for program participants to complete during the student experience.

Employment and New Hire Orientation

Employment and new hire orientation outlines the student pathway from academic program completion and graduation through employment to assist students in transitioning to full-time roles.

Employment includes the role that students are hired into upon successful completion of the talent pipeline program.

New hire orientation outlines the process of onboarding and acclimating new employees to your organization.

Marketing + Recruitment

This priority area entails marketing to a broad base of audiences and recruiting appropriately qualified talent to the program.

Budget

The program budget captures expenditures required by each program priority area. The budget includes only costs that would not otherwise be incurred. It captures these costs for both the employer and the education partner.

Program Incentives

Incentives include any financial or experiential benefits the students receive throughout the talent pipeline program.

Governance Structure

This priority area includes key stakeholders from both your organization and the education partner, including the roles and responsibilities of each. The purpose is to create a proper accountability structure and provide oversight of the pipeline program. The governance structure will ensure the program's continuity and success over time.

2 Develop a Guiding Structure

The visual below demonstrates the relationship among the vision and mission, priorities, goals, strategies, and tactics. In this step, the project team, in partnership with key stakeholders, will set goals and strategies for each of the priority areas.

Vision + Mission	Priority	Goal	Strategy	Tactics
Set the foundation for what the organization would like to achieve and guide the priorities, goals, and strategies	Represents a key component of the plan and creates segmentation between work streams	A quantifiable target is associated with a specific outcome of a series of strategies or activities	The means of achieving a quantifiable goal. It is typically a high-level action that yields the desired outcome	A specific activity that can be executed to carry out a high-level strategy and further support achieving a quantifiable goal

Create quantifiable outcomes

The first step of this development process is establishing **goals**. The goals are quantifiable targets that are associated with specific outcomes of a series of strategies or activities. A **strategy** is a means of achieving a quantifiable goal. The funnel tool shown below can be used as a guide for the goal drafting process.

Process		Sample Goals
Creating awareness	Marketing	1,000
Outreach to application	Recruitment	90
Application to offers	Selection	42 – 46
Acceptance to program start	Matriculation	36 – 39
Curriculum + experiences	Student Experience	33 – 36
Hiring process + integration	Employment	25 – 30

Talent pipeline program goals are built with the end in mind. The ultimate goal of a talent pipeline program is to employ a defined number of students, so the example funnel and corresponding goals above are built from the bottom up, considering the likely conversion rates. Each priority area is built in succession to support the final employment goal.

Outlined below are examples of goals developed for previous talent pipeline projects by priority area.

Sample Goals

Marketing and Recruitment

- 1,300 – 1,500 direct mailings
- 15 social media posts in advance of campus events
- Email outreach to current students
- Strategies reach all identified audiences
- Tactics include a mix of digital, print, and in-person approaches

Selection and Matriculation

- 46 students interview
- 27 – 33 students receive an offer
- 24 – 30 students receive an offer
- 4 – 7 students placed on a waiting list

Student Experience

- 100% of students graduate talent pipeline program in 4 years
- 100% of students graduate with strong knowledge in relevant in subject matter and techniques
- 100% of students complete a work-based experience (WBE)
- 95% of students are satisfied with their WBE
- 95% of managers and peers are satisfied with the students' performance in the WBE
- 100% of students who complete a WBE want to pursue a career with the employer

Employment

- 90% of students receive a job offer
- 25 students accept a job offer
- 85% of new hires are fully productive within three months
- 90% of new hires stay at least two years

Develop supporting strategies and tactics

Once targeted goals for each priority area are established, strategies should be developed with input from employer and education partner stakeholders. Strategies are typically a set of high-level actions that yield the desired outcome. Tactics can also be developed to further support the desired outcomes. A **tactic** is a specific activity that can be executed to carry out a high-level strategy.

Outlined below are examples of strategies and tactics developed for previous talent pipeline projects by priority area.

Sample Strategies

Marketing and Recruitment

- Develop marketing materials to attract talent to the company and program
- Host events to garner excitement and interest in the company and program
- Develop coursework for the program, such as a module to introduce the program and company

Selection and Matriculation

- Streamlined and broadly communicated application process that includes an online application, resume, cover letter, and faculty recommendations
- Interview process that evaluates candidates on the company's core competencies
- Offer process that takes into consideration the education partner's recommendations
- Host events to engage and prepare the cohort of students prior to the start of the program

Student Experience

- Robust curriculum aligned with role requirements
- Paid internship with a role-specific orientation
- Service opportunities that align with the company's mission
- Social, networking, and professional development opportunities

Employment

- Guaranteed employment upon successful completion of the pipeline program
- Priority interview given to students who complete the pipeline program
- Graduate-level internship that culminates in full-time employment upon successfully completing necessary educational requirements

Identify owners to execute goals and strategies

Once the goals and supporting strategies are finalized for each key priority, identify stakeholders from your organization and the education partner to own and ensure proper execution of each strategy. The roles and responsibilities of all stakeholders must be clearly defined and communicated to guarantee the success of the talent pipeline program.

Outlined below are examples of roles and groups formed to manage responsibilities for previous talent pipeline projects.

Employer Program Manager → **Education Partner Program Lead** → **Working Group** → **Steering Committee**

- **Employer Program Manager**: Full-time role at employer
- **Education Partner Program Lead**: Supports university program management
- **Working Group**: Small group of employer stakeholders
- **Steering Committee**: Leadership representatives governing the program

3 Finalize Program Plan

Draft program deliverables

The finalized program components and guiding goals and strategies should be documented in a strategic plan and corresponding suite of supporting deliverables. Shown below are example deliverables used to outline previous talent pipeline projects.

Strategic Plan

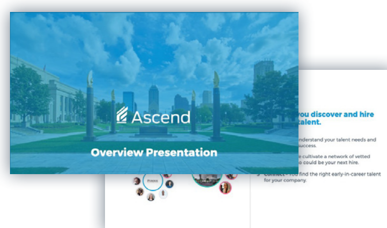
A comprehensive written account of the operational goals developed and the actions needed to achieve the desired outcomes. The strategic plan includes an overview of the need, causes, vision, priorities, goals, strategies, governance, structure, budget, and timeline.

Executive Summary

A condensed, written account of the partnership, including a summary of the need, causes, vision, priorities, goals, and corresponding strategies.

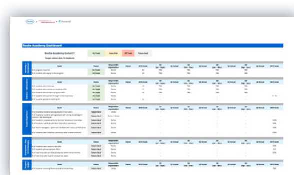
Overview Presentation

A presentation with visuals and graphics outlining the same concepts as the strategic narrative, but utilizing visuals and organized text as opposed to written formats.



Program Dashboard

A project management tool that includes priorities, goals, and activities agreed to by the employer. Goals will be broken down on an annual, quarterly, and/or semester basis and will align to the time frames outlined within the strategic plan.



Finalize partner agreement

The Strategic Plan is created to serve as a foundation for a long-term partnership between the employer and the higher education institution. Following the creation of the strategic plan, it is recommended to finalize a partner agreement. This is a legal agreement between the employer and education partner that outlines roles, responsibilities, and other key expectations of the partnership. The method of formalizing this agreement will be at the discretion of the employer and education partner.

Design Phase Key Learnings

It is important to ensure the correct stakeholders are present for the identification of the key priority areas, goals, and strategies that are to be outlined in the Strategic Plan.

The purpose of backwards planning the strategies from the identified goals is to ensure that the project has a way to measure success.

A Dashboard can be utilized alongside the Strategic Plan to capture the owners of each strategy and ensure accountability for a successful program implementation.

Path Forward

The Design phase results in key deliverables for defining the talent pipeline project moving forward. Following the completion of the Design phase, the project team and others will develop a structure for launching the talent pipeline, both through internal change management and external communications strategies, in order to ensure a strong start to the partnership.

LAUNCH

Summary

The Launch phase is the final step in the process for developing a talent pipeline. The purpose of the launch phase is to transition program ownership to the necessary stakeholders and align with the education partner on a plan to share the program with appropriate external audiences. Completion of the program launch results in a written launch plan, which includes both a change impact assessment and a communications strategy, excitement within partner organizations, and positive media placements.

Approach

The steps for completing the Launch phase involve a series of meetings with the project team to assess key change management implications and strategies, several meetings with the project team and appropriate communications representatives to determine the scope of the communications strategies, and a meeting to align with the education partner on the determined strategies. Key activities include:

1 Outline Change Management Components

- Determine necessary organizational changes
- Draft change management strategies

2 Outline Communications Components

- Determine scope of communications strategy
- Draft communications strategies

3 Develop Comprehensive Launch Plan

- Finalize documentation
- Conduct approval process with partners

Outcomes

- Outline **internal people, process, and technology** changes necessary to implement the strategic plan
- Develop a **communications strategy** to aid in program recruitment and publicity

1 Outline Change Management Components

Determine necessary organizational changes

Outlined below are the key components of a launch plan. First, **it is critical to understand how this new program will impact the current processes within your organization and your partner organization(s)**, **as well as the implications for the stakeholders** involved in those processes.

Questions to Consider

1. What changes are being made to the existing processes and activities?
2. What new processes and activities are being introduced?
3. Who is affected by the changes? How are they affected?
4. What is the level of impact on each of the stakeholders affected?

Identify Stakeholders to Engage | **Define Change Management Strategies** | **Define Scope of Communications Strategies** | **Draft Plan** | **Conduct Approval Process**

Stakeholder Analysis

First, align on organizational changes and key communications that must occur for programmatic elements to be implemented successfully, using the Questions to Consider above. Then, see the sample table below to identify the stakeholders impacted, their level of influence, and actions needed for a successful program implementation.

Sample Stakeholder Analysis

Stakeholder/Role	Influence (H/M/L*) *High, Medium, Low	Requirements for Implementation
Hiring Managers	**H**	• Attend two additional days of interviews • Select ‘x’ number of students from education partner
Role Supervisors	**H**	• Regularly communicate with HR to forecast openings • Ensure program participants have a positive internship experience
Recruiters	**M**	• May need to utilize new or different recruiting tactics to meet participant goals
Supporting Staff	**L**	• May need to adjust or develop strategies to support program participants

Draft change management strategies

Once the impacted stakeholders and key implications have been considered, your organization should then identify, draft, and finalize the necessary strategies to ensure a smooth implementation. The following visual shows this process in more detail.

Identify

The team must identify the specific process changes needed, as well as how expectations and responsibilites for each stakeholder will be adjusted.

Draft

The project team will need to draft strategies to ensure the impacted stakeholders at your organization and partner organization(s) are made aware of the changes and are prepared for implementation.

Questions to Consider

1. How will the affected parties be notified?
2. When will the changes be communicated?
3. What other next steps exist for implementing the change management strategies?
4. Who else should be involved in the change management implementation?

Finalize

The project team will expand the stakeholder analysis table above to include the specific process changes, the communication plan, timing, and next steps to finalize the change impact assessment. Refer to the link in the appendix for an example of a finalized change impact assesment spreadsheet.

2 Outline Communications Strategies

Determine scope of communications strategies

Prior to drafting the comprehensive launch plan, it is critical to get alignment on the scope of the communications strategy. **First, identify the desired communications outcomes and goals of the Launch phase.** With clearly defined goals and outcomes, the project team can then draft strategies to achieve the outcomes and allocate resources, personnel, and time appropriately throughout the launch of the program.

Questions to Consider

1. Who are the target audiences? What are the communications goals for each?
2. What is the broader impact your organization would like the program to have? (i.e. influence state policy, improve the economy, etc.)
3. What communications activities will support the successful launch of the program to internal and external audiences?
4. How can the program be utilized as a platform for influencing public policy?

Draft communications strategies

Lay out the communications goals and strategies for your launch plan. The table below outlines the scope of a sample communications plan and includes sample goals and strategies for each identified audience. The final plan should be informed by the expertise of marketing personnel.

Sample Communications Goals + Strategies		
Audience	**Goal**	**Strategies**
Employees	All employees will know about the program **prior to launch**	• Send mass email • Include feature in company newsletter • Managers to discuss in team meetings (monthly)
Prospective Program Funders + General Public	The program will receive # of positive media placements	• Press release • Pitch targeted media outlets
Prospective Program Participants	Get program opportunity in front of ideal participants	• Pitch widely-viewed TV/radio outlets • Plan info sessions at education partner campuses • Invite target students to an event introducing the program
Thought Leaders	Provide policy recommendations to key decision makers	• Host a policy roundtable on state and national policy with local lawmakers as it relates to the program purview

Marketing Collateral

The communications plan necessitates marketing collateral for the talent pipeline. Some examples of collateral may include:

- Press release
- Logo/branding of the program
- Website for the program
- Op-eds
- One-pagers

In addition, spokespersons, including potential program beneficiaries and/or project team members, can be leveraged to help provide additional context, interview, and/or audo-visual content for the media.

3 Develop Comprehensive Launch Plan

Finalize documentation

The inputs created to this point, including both the change management and communications strategies, should be finalized into a comprehensive narrative plan defining the scope of the launch.

Conduct approval process

After finalizing the launch plan, it should be collectively reviewed and approved by the necessary stakeholders, including internal stakeholders and the education partner, to determine the delegation of responsibilities over the various action items. This should result in a spreadsheet implementation plan, which includes a list of action items that are assigned to the necessary stakeholders from each organization and appropriate due dates agreed upon by both parties.

Note: If your talent pipeline is supported by a funding organization, it is important to include them earlier in the planning process to ensure that the change management and communications strategies align with their policies and the grant requirements. It is advised to include a member of the funding organization's communications team throughout this entire phase in order to ensure the program launch achieves all desired outcomes.

Launch Phase Key Learnings

Communicating changes in processes to internal stakeholders as early and clearly as possible will allow them to plan accordingly and ensure smooth implementation.

Taking into account the communications goals of the various stakeholders is necessary for developing a launch plan that is comprehensive and satisfies the needs of everyone involved.

Aligning with stakeholders, including the education partner, on the launch plan is important for maintaining consistent messaging with students, policymakers, and the media.

Path Forward

Outlining the people, process, and technology changes necessary to implementing the strategic plan will contribute to a successful internal launch of the talent pipeline, while communications strategies will aid in program recruitment and support an effective external launch. Following the Launch phase, your work-based learning program will be well-positioned to recruit students and gain necessary traction among various audiences, ensuring that stakeholders are aware of and share in the benefits of the program. Through implementation of the strategies above, your newly-created work-based learning program will produce a sustainable pipeline of talent, galvanize similar projects, and advance the public good.

CONCLUSION

Ascend would like to thank Richard M. Fairbanks Foundation for their generous support to create this toolkit. The Talent Pipeline Replication Toolkit is designed to be a roadmap for your organization to build a customized talent pipeline strategy to continuously attract, recruit, and prepare appropriately skilled individuals to fill roles at your organization. The strong partnership you form with an education institution will greatly benefit program participants and encourage stronger alignment between talent supply and demand. As such, your newly-created work-based learning experience will ultimately yield positive outcomes for students, employers, education institutions, and the broader economy. Should you need additional support in the creation of your talent pipeline, Ascend Services is available to serve as a resource. To learn more and get in touch with us, visit ascendindiana.com.

APPENDIX A: SAMPLE REQUEST FOR INQUIRY

To review a sample Request for Inquiry (RFI), follow this link: https://ascendindiana.com/uploads/resource-downloads/Early-Learning-Indiana-Request-for-Information-Final.pdf

APPENDIX B: SAMPLE STRATEGIC PLAN EXECUTIVE SUMMARY

To review a sample Strategic Plan Executive Summary, follow this link: https://ascendindiana.com/uploads/resource-downloads/Community-Behavioral-Health-Academy-Executive-Summary-FINAL.pdf

APPENDIX C: SAMPLE PROJECT DASHBOARD

Included below is a screenshot from a sample Project Dashboard.

Community Behavioral Health Academy - Program Dashboard

2018 - 2019 AY | On Track | Some Risk | Off Track | Last updated on: 9/18/2018 | Last updated by:

Goals	Managing organization	Owner	2018 - 19	Q1 (Jul. - Sept.)	Q1 Actual	Q2 (Oct. - Dec.)	Q2 Actual	Q3 (Jan. - Mar.)	Q3 Actual	Q4 (Apr. - Jun.)	Q4 Actual	Last Week	This Week
# of direct mailings	CBH / IUSSW / UIndy		#VALUE!	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
Email outreach to all current MSW students (Y/N)	CBH / IUSSW / UIndy		N	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of class presentations per academic year	CBH / IUSSW / UIndy		#VALUE!	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of info sessions per academic year	CBH / IUSSW / UIndy		#VALUE!	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of opportunities to share flyers with professional organizations per month	CBH / IUSSW / UIndy		#VALUE!	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
Information shared with all academic advisors (Y/N)	CBH / IUSSW / UIndy		N	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of students applying for the Academy	CBH / IUSSW / UIndy		43	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**

Goals	Managing organization	Owner	2018 - 19	Q1 (Jul. - Sept.)	Q1 Actual	Q2 (Oct. - Dec.)	Q2 Actual	Q3 (Jan. - Mar.)	Q3 Actual	Q4 (Apr. - Jun.)	Q4 Actual	Last Week	This Week
# of students interviewed	CBH / IUSSW / UIndy		39	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of students offered a spot in the Academy	CBH		30	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of students accepting offers	CBH		30	TBD	0	TBD	0	TBD	0	TBD	0	On Track	**On Track**
# of students will be contacted by CBH field instructors to set up start dates, times, and locations	CBH		30	TBD		TBD		TBD		TBD		On Track	**On Track**
# of students will complete all CBH mandatories (non-BH Network only) prior to start date	CBH		30	TBD		TBD		TBD		TBD		On Track	**On Track**
CBH offers a welcome social	CBH		Complete	TBD	0	TBD		TBD		TBD		On Track	**On Track**

Goals	Managing organization	Owner	2018 - 19	Q1 (Jul. - Sept.)	Q1 Actual	Q2 (Oct. - Dec.)	Q2 Actual	Q3 (Jan. - Mar.)	Q3 Actual	Q4 (Apr. - Jun.)	Q4 Actual	Last Week	This Week
% of students attending Academy seminars	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
Students will be grounded in BH EBPs	CBH / IUSSW / UIndy		100%	TBD	#DIV/0!	TBD	#DIV/0!	TBD	#DIV/0!	TBD	#DIV/0!	On Track	**On Track**
% of students attending twice monthly supervision + education	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of students participate in at least 1 social activity	CBH		70%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of Academy students complete CBH practicum	CBH		95%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of students completing the practicum are satisfied with their practicum experience	CBH		90%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of students completing the practicum achieving endorsement in MI	CBH / IUSSW / UIndy		100%	TBD	#DIV/0!	TBD	#DIV/0!	TBD	#DIV/0!	TBD	#DIV/0!	On Track	**On Track**
% of students completing the practicum interview for open CBH positions	CBH		90	TBD		TBD		TBD		TBD		On Track	**On Track**

Goals	Managing organization	Owner	2018 - 19	Q1 (Jul. - Sept.)	Q1 Actual	Q2 (Oct. - Dec.)	Q2 Actual	Q3 (Jan. - Mar.)	Q3 Actual	Q4 (Apr. - Jun.)	Q4 Actual	Last Week	This Week
% of new hires complete mandatory training on time	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires receive targeted training in their concentration	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of students receive temporary LSW	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires who feel prepared to begin employment	CBH		90%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires take LCAC exam with an 80% pass rate within 6 months of employment	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires take LSW exam with an 80% pass rate within 6 months of employment	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires are prepared to take the LCSW exam	CBH		100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires achieve LCSW and LCAC licensure within 2.5 years of employment	CBH		95%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires remain employed at CBH for a minimum of 3 years post-graduation	CBH		85%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of new hires achieve required productivity levels within 3 months of employment	CBH		85%	TBD		TBD		TBD		TBD		On Track	**On Track**

Goals	Managing organization	Owner	2018 - 19	Q1 (Jul. - Sept.)	Q1 Actual	Q2 (Oct. - Dec.)	Q2 Actual	Q3 (Jan. - Mar.)	Q3 Actual	Q4 (Apr. - Jun.)	Q4 Actual	Last Week	This Week
% of year 1 funding secured	CBH	Joyce Irwin	100%	TBD		TBD		TBD		TBD		On Track	**On Track**
% of year 2 funding secured	CBH	Joyce Irwin		TBD		TBD		TBD		TBD		On Track	**On Track**

Goals	Managing organization	Owner	2018 - 19	Q1 (Jul. - Sept.)	Q1 Actual	Q2 (Oct. - Dec.)	Q2 Actual	Q3 (Jan. - Mar.)	Q3 Actual	Q4 (Apr. - Jun.)	Q4 Actual	Last Week	This Week
# of working group meetings completed in the first year of the Academy	CBH		18	TBD		TBD		TBD		TBD		On Track	**On Track**
# of steering committee meetings completed each year of the Academy	CBH		12	TBD		TBD		TBD		TBD		On Track	**On Track**

APPENDIX D: SAMPLE INTERNAL CHANGE IMPACT ASSESSMENT

Included below is a screenshot from a sample Internal Change Impact Assessment.

	Behavioral Health Academy - Change Impact Assessment								
	Topic	Current Process	Academy Process	Impacted Individuals	Process Changes	Level of Impact H/M/L	Communication plan	Timing (pre- or post-launch)	Next steps
Selection	**Interview Days**	CHNw has one day of interviews for practicum placements	CHNw will have two days of interviews for practicum placements.	Clinical directors	Clinical directors will be required to attend 2 days of interviews	Medium	Communicate: When we do Academy fair, the bar needs to be high. Interview them as you would a hire.	Pre-launch	CB to take this proposal to OLT
				Hiring Manager	Hiring managers will be required to attend 2 days of interviews	Medium			
	Selecting candidates	Managers can hire from wherever they want	Managers will give initial preference for Academy students. For forecasted openings, starting November, use existing Academy students as interns for unlicensed positions. In January of each year, managers forecast their anticipated needs for unlicensed and begin initial search among Academy students. If they can't find who they need among Academy students, they can go out and find someone else.	Operations Directors	Ensure that their managers are following this new procedure	High	Communicate: When we do Academy fair, the bar needs to be high. Interview them as you would a hire.	Pre-launch	CB to take this proposal to OLT
				Managers	39 students will be interviewed (24 from IUSSW and 15 from Uindy)				
					30 students offered a spot (20 from IUSSW and 10 from Uindy)				
Academy Orientation	**View of treatment services (addictions as a core behavioral health issue)**	Addictions is currently seen as a specialty. It is still accepted for managers to hire people without these skills.	Shift culture to include addictions as part of core behavioral health services rather than a specialty	Staff	See themselves as mental health and addictions as opposed to either or.	High	George and executive leadership share vision at a manager and above meeting	Pre-launch	CB share vision with OLT and make these process changes part of the manager and above meeting agenda
				Managers	See value in hiring someone who can do both to someone who refuses to do addictions.				
				Managers	Incorporate into orientation				
				Clinical Supervisors	Must learn to supervise professionals for both mental health and addictions.				
				Operations Directors	See value in hiring someone who can do both to someone who refuses to do addictions.				
				Operations Directors	Create programming to support staff in addressing addictions.				
				Operations Directors	Incorporate into orientation				
				Psychiatrists, Nurses, Doctors	Seeing this as integrated and not a specialty.				
				OLT	Communicating and reinforcing the vision.				
					Intentional in how they structure				

Building Talent Pipelines

Ascend

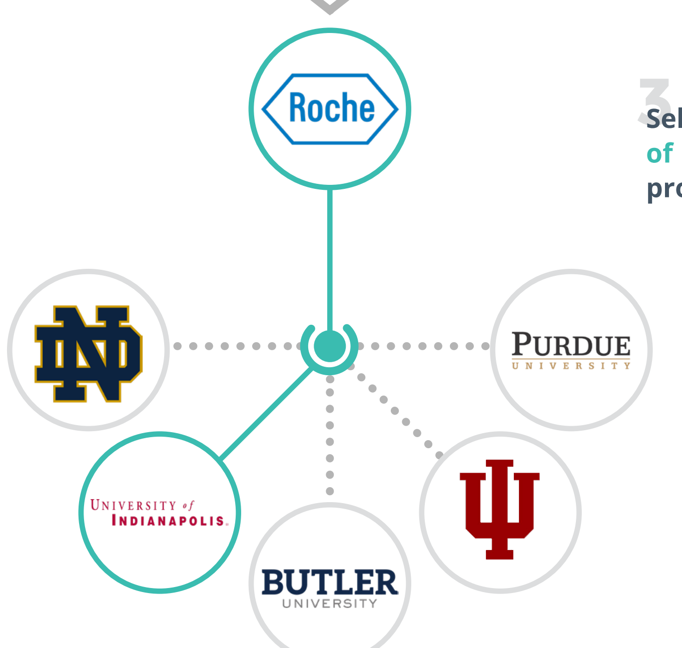
Ascend Indiana (Ascend) is the talent and workforce development initiative of the Central Indiana Corporate Partnership (CICP). Ascend's talent pipeline process helps companies identify and address their talent development gaps through a proven methodology. This model guides employers through a process to clearly define their demand, secure one or more education partners, design a custom talent solution, and launch a program that meets their talent needs. Each customized talent pipeline strategy will ultimately yield positive outcomes for students, employers, education institutions, and the broader economy.

DISCOVER

1. **Identify a role or set of roles that are difficult to fill, high-volume, and/or critical to business success.**
2. **Define the cause(s) for the misalignment between the demand for the role and the supply of talent.**
3. **Develop Program Case including goals, an initial program model, and a timeline.**

IDENTIFY + SECURE

1. **Engage prospective education partners to share the talent need, define the program goals, and gauge interest.**
2. **Complete education partner interviews and develop a Partner Report evaluating each partner's alignment to the criteria.**
3. **Select a partner and sign a Memorandum of Understanding agreeing to build a program.**



DESIGN

1. **Convene key stakeholders to define priorities, goals, strategies and owners.**
2. **Document Strategic Plan and socialize with partners.**
3. **Develop a Dashboard to track progress against identified goals and timelines.**

Marketing + Recruitment
- Class presentations + info sessions
- Branded promotional materials
- Professional organization outreach

Selection + Orientation
- Candidate pre-screening
- Interviews + selection
- Cohort orientation

Education Experience
- Role-aligned curriculum
- Program-specific electives and seminars
- Internship + co-op experiences
- Planned cohort networking events
- Financial incentive

Employment + New Hire Orientation
- Priority interview
- Hiring process
- Financial incentive

Governance + Sustainability
- Steering committee
- Oversight process
- Return on investment model

LAUNCH

1. **Outline people, process, and technology changes necessary to implement the strategic plan.**
2. **Develop a Communications Plan to aid in program recruitment and publicity.**