



Upskilling Program Replication Toolkit

Overview

Compiled by: Ascend Indiana
With support from: Richard M. Fairbanks Foundation
Date: March 2022

INTRODUCTION

Purpose

Ascend Indiana (Ascend) developed the Upskilling Program Toolkit (Toolkit) to share learnings and best practices in developing employer upskilling programs. Upskilling is an important talent strategy that fuels business growth and enables access to education, training, and development opportunities. Employers interested in an upskilling talent strategy can use the action-oriented steps outlined in the Toolkit to design and launch an upskilling program.

This Toolkit Overview serves as a companion to the full Toolkit. It introduces the context and program development phases to build an upskilling program and a high-level overview of the action steps and key learnings for each phase.

CONTEXT

Job Market Landscape

Globalization. Automation. Digitization. Our nation's economy is evolving at the most rapid rate in its history accelerated by the COVID-19 pandemic. Businesses are struggling to find qualified talent to fill significant numbers of open roles. Individuals are working to overcome significant hardships. Now is the time to support employers in rethinking their talent strategies to address these challenges.

Demand

Indiana's job market significantly expanded in 2021 with a 40% increase in job openings, rising above the national increase of 37%.¹ The jobs with the highest wages and occupational growth projections require a post-secondary certificate or degree.² These openings demonstrate how employers are demanding a more skilled and specialized workforce.

In a 2021 Indiana Chamber Employer Workforce Survey, employers identified the scale of the problem and lack of solutions. As a result of the limited talent pool, 17% of employers are reluctantly hiring underqualified talent, 60% are leaving job postings open, and 18% are assigning already busy existing employees additional responsibilities.³

To grow economic opportunity in our state, we need talent strategies to fill these jobs.

Supply

Our talent pool has also been through significant change. Indiana's unemployment rates continue to drop to a record low of 2.7%⁴ while simultaneously 72% of businesses reported an inadequate supply of applicants who meet their employment needs.⁵ In 2021, 33% of Indiana's population had a high school diploma as their highest degree of education and 57% of the population had some college education or higher.⁶

While employer's are seeking more skilled and specialized talent, given Indiana's low unemployment rates, individuals are opting out of higher levels of education that are needed. Indiana's rate of college-

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3 Indiana Chamber. (2021). Indiana Worker Survey Key Findings. Retrieved from <https://www.indianachamber.com/wp-content/uploads/2021/12/2021-Worker-Survey-KEY-FINDINGS.pdf>

4 Indiana Department of Workforce Development. (n.d.). Hoosiers by the numbers. Employment briefing snapshot: Infographics. Retrieved from <https://www.hoosierdata.in.gov/infographics/employment-briefing.asp>

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bound high school graduates plunged in 2021 to a ten-year low of 59%.⁷ Further, nearly one-third of Hoosiers believe a high school diploma is sufficient to have a thriving career in Indiana.⁸

Misalignment

The compounding effects of the misalignment between demand and supply present significant challenges for employers. Individuals in current roles are overwhelmed and overburdened. Employers are unable to grow their business as demand grows. There is a need to leverage new talent strategies to attract and retain a skilled workforce with higher levels of education and training while also designing ongoing training opportunities for the current workforce.

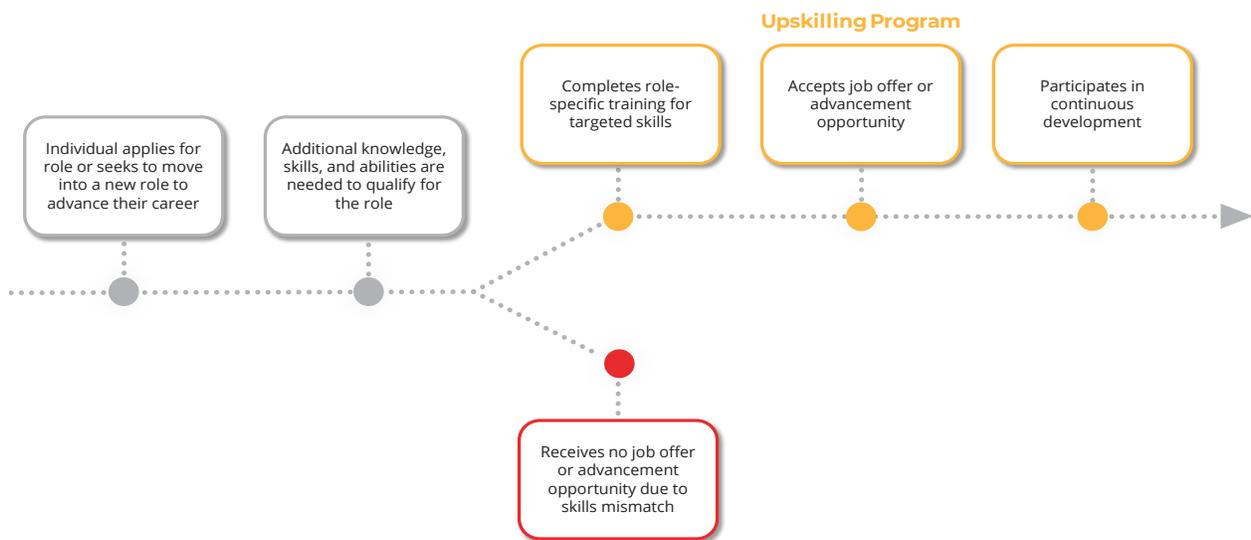
Solution

Given the constricted labor market and limited talent pool, designing an upskilling strategy focused on developing talent with the necessary knowledge, skills, and abilities (KSAs) to meet growing needs is one important and underutilized solution

Upskilling as a Talent Strategy

Upskilling is a talent strategy enabling job-tailored skill development for current employees. The focused nature of the training to the job requirements is an important differentiator from traditional training programs that are focused on the general skills that might be needed in an industry or role. One important and sometimes missing component is a focus on delivering wrap-around supports such as tuition assistance, online delivery models, and paid time to complete the training to ensure employee success.

Upskilling can be leveraged as a talent solution across all industries and occupations and for multiple types of talent pools: equipping a displaced worker with a new skill set for an in-demand role, training an existing employee with new skills for them to advance into their next role, or developing in-demand, role-connected skills for non-traditional or disadvantaged workers. The visual below illustrates how an upskilling program enables a pathway for these talent pools to secure the skills they need to advance in their career journey.



⁷ Indiana Commission for Higher Education. (2021). Indiana College Readiness Report 2021. https://www.in.gov/che/files/2021_College_Readiness_Report_04_21_2021a.pdf

⁸ Indiana Chamber. (2021). Indiana Worker Survey Key Findings. Retrieved from <https://www.indianachamber.com/wp-content/uploads/2021/12/2021-Worker-Survey-KEY-FINDINGS.pdf>

Employers and employees recognize the value of training as a retention strategy. In 2021, 17% more Indiana employers indicated an increased desire to invest more time in training and 14% more employers were seeking to invest in additional funding for training.⁹ At the same time, 58% of employees believe the skills needed for their jobs have changed significantly over the last five years, and 94% believe that ongoing education and training is critical to improving their job performance and career prospects.¹⁰

Upskilling is a win-win for employers and individuals, with the following outcomes stemming from upskilling programs benefitting both:

- ① Maximize individual engagement by investing in their professional growth and success in their role.
- ② Improve employer's bottom line by increasing productivity, reducing turnover, and maximizing individual talent.
- ③ Meet shifting or increased industry demands that are unable to be addressed through new talent alone.¹¹ Upskilling creates a resilient workforce for individuals and employers to remain relevant in a growing economy.
- ④ Establish a clear pathway for individual advancement opportunities within their company. Incumbent employees participating in upskilling are familiar with their role and responsibilities, allowing them to focus on developing new skills.
- ⑤ Ensure long-term sustainability and prepare employees for success in emerging and evolving job roles.

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ASSESS

Summary

The **Assess Phase** is where an employer gathers critical input from those who will be involved with the upskilling program, conducts research to select a training partner, and identifies best practice strategies for program design considerations. The project team will conduct focus groups and send surveys to elicit feedback around interest in participating in an upskilling program, the KSAs that need to be developed through the program, barriers to program success, and other program design components. The feedback from stakeholders and best practice research will enable the project team to be prepared to develop the program map, goals, and strategies as part of the Design Phase.

Phase Outcomes

- Identified motivations and barriers of potential program participants
- Final list of KSAs that need to be developed through the program
- Selected training partner who will lead program delivery
- List of best practice strategies to support program design

Approach

1 **Understand the Interest Level and Concerns of Individuals Who Will Be Participating in and Supporting the Upskilling Program**

- Conduct focus groups and/or surveys with potential program participants
- Meet with managers and leadership teams to discuss ideal state of program design
- Summarize desired program components and barriers to program success to inform program design

2 **Explore Training Solutions**

- Develop criteria to evaluate potential training solutions
- Identify existing trainings that could support program delivery and evaluate options to determine best fit
- Identify internal resources that can be leveraged to support the program

3 **Research Best Practices**

- Identify upskilling strategies that contribute to program success
- Document key learnings to consider for program design

Key Learnings

Engaging program participants through focus groups and stakeholder interviews provides critical insight to ensure the program is desirable to employees and aligned to an organization's needs.

Developing robust criteria to evaluate potential training solutions against enables an efficient training selection process and confidence among the project team and leadership in the decision.

Considering best practices from existing upskilling programs helps to equip the project team with ideas around program design in advance of starting the design process and starts to provide clarity around how the program could work.



DESIGN

Summary

The **Design Phase** is focused on building the program framework. It includes drafting the program vision and mission, and developing the goals and strategies to achieve that vision. The Design Phase also outlines the change management and implementation considerations to support a successful program launch. Upon the completion of this phase, the project team will have a designed program and will be prepared to begin program launch as part of the Launch Phase.

Phase Outcomes

- Finalized objective, purpose, and desired outcomes of the organization's upskilling efforts
- Developed goals to define program success
- Established strategies to advance and achieve the program goals
- Drafted implementation plan to support launch

Approach

1 *Define Vision and Mission*

- Establish objectives and outcomes for the mid-term and long-term future
- Declare program's core purpose and focus

2 *Develop Goals and Strategies*

- Determine the key priority areas that define the upskilling program
- Define quantifiable goals and strategies with actionable steps for each priority area

3 *Outline Implementation and Change Management Plans*

- Identify key communications to successfully implement programmatic elements
- Draft and finalize the necessary strategies to ensure a smooth implementation
- Establish expectations and responsibilities for each stakeholder to understand process changes

4 *Document Program Design*

- Draft deliverables to support program communication, awareness, and implementation of the program launch
- Assign project owners to establish a clear timeline and the tasks to be completed before launch

Key Learnings

Engage **program participants and internal stakeholders throughout the process of designing the program** to ensure that the program priority areas remain aligned with the needs of program participants.

Leverage **existing systems within the organization** (such as existing time dedicated to training) to lessen the need for changes to existing processes and expectations.

Evaluate **change management implications as you design the program** to support strong planning prior to program launch.



Summary

The Launch Phase is the final step in program development and is where an employer focuses their actions on building the program. The implementation plan developed in the Design Phase is the guide for what actions are needed to deploy each strategy. The project team will identify the high-priority and immediate steps in the plan that must be acted upon quickly to start the program, will engage the owners of the action steps, and will ensure there is a clear timeline for completion. The Launch Phase is also where the employer makes an official announcement of the launch of the program.

Phase Outcomes

- Completed implementation steps to build program
- Launched upskilling program

Approach

The steps for completing the Launch Phase involve a series of meetings with the project team to assess key change management implications, strategies and appropriate communications representatives to determine the scope of the communications strategies.

Key activities include:

1 *Begin Taking Actions against Implementation Steps*

- Identify high-priority and near-term action items, including change management strategies
- Engage implementation owners
- Outline key timelines

2 *Announce Program Launch*

- Finalize program launch messaging
- Deploy internal and external communication strategies

Key Learnings

Communicating **changes in processes or expectations with the individuals who will be impacted as early and clearly as possible** will allow them to plan accordingly and ensure smooth implementation.

Considering the **communications goals of the various audiences is necessary** for developing a launch plan that is comprehensive and meets the needs of everyone involved.



Conclusion

The labor market continues to rapidly evolve. Employers need new tools and strategies to attract and retain a qualified workforce. Individuals need access to ongoing training and support. Upskilling will be a critical talent strategy to consider as it enables employers to respond to changing roles and responsibilities and tailors training to specific roles. Overall, upskilling programs benefit all stakeholders: employers build a sustainable talent pipeline, employees secure the skills they need to secure a good job, and communities have greater opportunities to thrive.

The four phases outlined in this Toolkit are designed to equip employers who are seeking to launch an upskilling strategy with a roadmap to build an upskilling program. If you are seeking additional support in the creation of your upskilling program, Ascend Services is available to serve as a resource. To learn more and contact us, visit ascendindiana.com.

Ascend Indiana would like to thank the Richard M. Fairbanks Foundation for their generous support in creating this toolkit. In addition, Ascend is grateful to the many partners including employers, education institutions, and others that provided feedback and input on the content.



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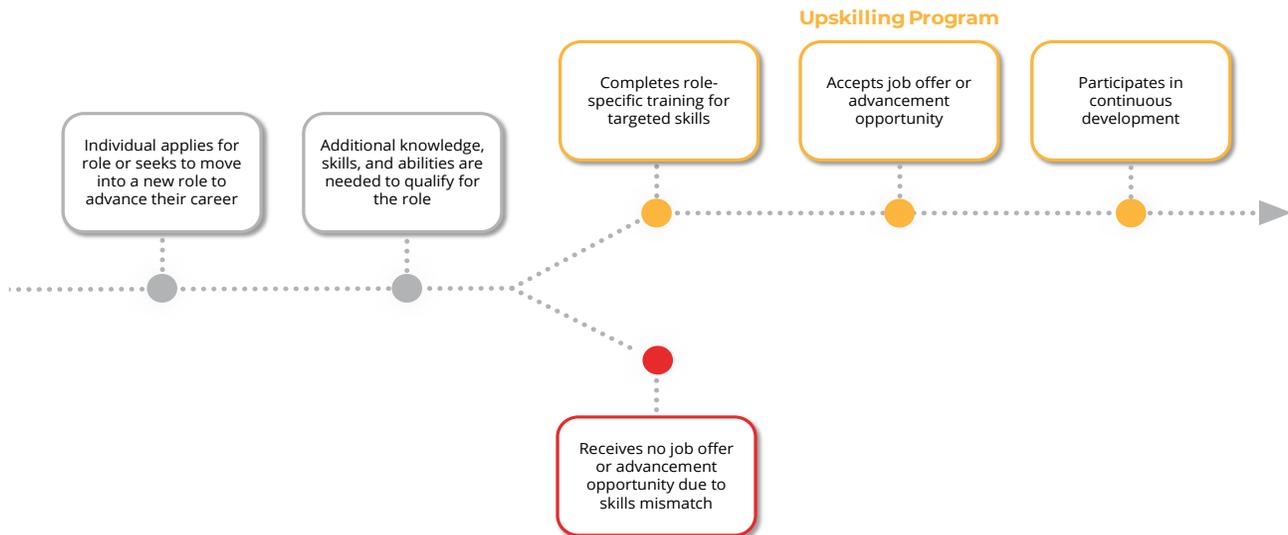
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role, training an existing employee with new skills for them to advance into their next role, or developing in-demand, role-connected skills for non-traditional or disadvantaged workers. The visual below illustrates how an upskilling program enables a pathway for these talent pools to secure the skills they need to advance in their career journey.

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TOOLKIT OVERVIEW

The Toolkit includes **four phases** to guide the development of an upskilling program: Discover, Assess, Design, and Launch. For each phase, the Toolkit outlines the outcomes of the work completed in that phase, the approach and supporting action steps. A detailed description of each action step and the key learnings highlight important considerations when completing that phase. Outlined below is a brief overview of the purpose and outcomes of each phase as a preview to the full Toolkit.

Discover Phase focuses on defining the talent challenge by selecting the role(s) that are in-demand and difficult to fill and understanding the challenges to hiring and retaining the necessary talent. This will enable the project team to then confirm that an upskilling program is a solution that will address the challenges. Once upskilling is validated as the talent solution to pursue, the outcome of the upskilling program will be defined, including what the set of competencies and resulting certification or credential is at the end of the program, who the target audience to participate in the program is, and the goals for how many individuals will participate. Finally, a business case is developed to support buy-in from leadership prior to moving to designing the program. Ultimately, this phase lays the foundation for the program by building a collective understanding of the “what” and “why” for the program.

Assess Phase evaluates the current labor market from multiple lenses: what knowledge, skills and abilities (KSAs) employees currently have versus what KSAs they need, what level of interest is there from individuals to participate, and what are the barriers to participating in an upskilling program. Additionally, the project team will evaluate potential training partners, both internal and external, to identify the best fit for the program and will conduct research to identify best practice strategies for designing upskilling programs. Finally, all the learnings from the Assess Phase will be documented so that they can be used for reference when developing strategies in the Design Phase.

Design Phase builds the key components of how the program will work. This includes developing the vision and mission, how an employer will market, recruit, and select program participants, what competencies are delivered as part of the training content and how it will be delivered, what wrap-around supports will be made available, and the estimated cost of the program. This phase results in a strategic plan for the program that documents the goals and strategies across all of the above areas, and defines the owners, resources needed, and timeline for implementation.

Launch Phase prepares the project team for program implementation by planning for process or policy changes that need to occur because of program design and understanding the steps the owners need to take, including communication with internal and external stakeholders, to prepare for the start of the program.

In addition to the outcomes, action steps, and key learnings for each phase, the following are three important steps to complete prior to launching a project and moving through each phase of the Toolkit.

1 Determine a Project Team

The project team will be responsible for the action steps outlined in this toolkit, including analyzing information, making program decisions, engaging and communicating with leadership, and managing project progress. As a result, it is important that the project team represent multiple areas of the business and can provide the following expertise:

- **Can speak directly to the talent challenges.** These are often individuals who are directly managing individuals in the role(s) of focus or lead teams that are inclusive of the role(s) of focus.
- **Recognizes employee perspective and opinion.** These are current employees who can represent and advocate for employees’ best interest.

- **Understands current recruitment and training initiatives.** These are often individuals who are in the Human Resources and/or Talent Management teams.
- **Knows the current business strategy and future vision for the organization or department.** These are often senior leaders of the organization or department.
- **Leads forward strong project management.** This is often a designated project manager with experience leading forward talent development projects or projects of similar complexity.

As the project team moves through each phase, it is recommended that you evaluate whether individuals need to be added to the team based on the direction of your strategy and expertise needed or whether individuals no longer need to participate based on a change in scope or type of expertise needed at that stage.

2 Develop a Project Plan

For each phase, this toolkit describes the outcomes, approach, and key action steps for a team to be successful in launching an upskilling program. To support efficient and timely progress towards the action steps and outcomes, it is recommended that the project team develops a project plan to define the timeline expectations for the work and clear owners for progressing the team forward. This will help to translate this toolkit into an action plan for achieving the team’s goals.

Time frames to complete this work will vary depending on where a team is at in their understanding of the talent need, existing infrastructure for training programs, and other factors; assuming a team is starting at the beginning, it is expected that a project team would need between eight and twelve months to complete all the steps outlined in this toolkit.

3 Consider Change Management Implications Along the Way

Developing a change management strategy is included as a critical action step during the Design Phase, however, it is important to evaluate change management implications throughout the process - not just at the end. Change management implications stemming from program development often include changes to policies, processes, and responsibilities. As the project team is moving through each phase, it is important to document if any of the decisions made will lead to a change that will need to have a strategy to address it. Outlined below is a sample of change management implications and strategies identified to address them.

Sample Change Management Plan				
Strategy	Process Change	Impacted Stakeholders	Level of Impact	Sample Actions
Provide resource toolkit to support participant managers to adapt team operations when participants are in training	<ul style="list-style-type: none"> • Shift existing priorities + delegate responsibilities accordingly • Determine changes in production or outcome goals 	<ul style="list-style-type: none"> • Human Resources • Team Managers • Operations 	High	<ul style="list-style-type: none"> • Collaborate with managers to quantify the potential loss in team production with employees participating in upskilling • Connect with operations and human resources to discuss resources and options to support participant team due to changes in staff capacity
Launch a new work hours structure to allow staff members to work part-time hours while receiving full-time pay and benefits	<ul style="list-style-type: none"> • Coding of staff for benefits • Shift scheduling approach 	<ul style="list-style-type: none"> • Human Resources • Team Managers 	High	<ul style="list-style-type: none"> • Meet with HR team to share the strategy and discuss approach to ensure staff do not lose their full-time benefits • Meet with team managers to communicate the “why” behind the strategy and discuss solutions to ensure they have the staff they need to support the work

 **DISCOVER****Summary**

The **Discover Phase** is an important first step in developing an upskilling program as it guides an employer to define the talent challenge, explore upskilling as the talent solution, and develop a business case. The Discover Phase requires the project team to review and analyze talent data to ensure upskilling is the best talent solution to meet the talent challenge. Ultimately, these steps begin to build the foundation for the “what” and “why” of the program, leading an employer to clarity of program scope and purpose before focusing on program design.

Outcomes

- Identified role or set of roles where there is a misalignment between employer needs and the knowledge, skills, and abilities of the existing workforce or talent pool
- An understanding of the scale of the misalignment and the causes contributing to the misalignment
- Confirmation that an upskilling program will address the talent challenge
- Defined KSAs that need to be developed and certification or credential that needs to be obtained
- Leadership approval for developing an upskilling program

Approach

The following action steps will guide an employer through the key activities needed to achieve the Discover Phase outcomes:

1 Define the Talent Challenge

- Identify high-priority talent challenges
- Determine the causes of the talent challenge

2 Explore Upskilling as the Talent Solution

- Validate that the talent challenge can be solved through upskilling
- Determine the outcome of the upskilling program

3 Gain Leadership Buy-in for Launching an Upskilling Program

- Define value proposition
- Share the business case

1 Define the Talent Challenge

A clear understanding of the talent challenge is critical to ensuring an upskilling program is the right solution. Further, it provides the foundation for developing goals and securing buy-in from leadership.

Identify High-Priority Talent Challenges

The first step to define the talent challenge is to identify the role or set of roles where you see the need for new talent strategies to close a talent gap or proactively address future business needs. To support the identification of these roles, the project team should first complete an analysis of recruitment, hiring, and retention data to understand the following questions:

- Is there a role(s) where there is consistently a gap between available jobs and how many individuals are hired?
- Is there a role(s) where you are not receiving a high-level of qualified applicants?
- Is there a role(s) in which there is high turnover?
- Is there a role(s) where you expect to hire at significantly higher levels than current state?
- Is there a role(s) where you expect changing role requirements based on evolving business needs?

The second step in defining the talent challenge is prioritizing across the roles identified those that require the most immediate solutions. To enable prioritization, the project team should evaluate, with quantitative data when possible, the following questions and convene a discussion to determine a single role of focus or a final ranked list of priority roles.

- How many individuals are in the role today compared to what is needed today or in the future?
- What is the impact on the services or products that the organization provides if the talent challenge for this role is not addressed?

- How urgent does the organization feel and how committed is the organization to solving this talent challenge?

The remainder of this toolkit is approached from the lens of solving for one role. If the project team determines there is more than one role that you want to develop an upskilling program for, you will want to run each role through each step of the Toolkit.

Determine the Causes of the Talent Challenge

It is important to understand the causes of a talent challenge to ensure the solutions that are being developed are going to address the root of the problem. Determining causes of the talent challenge is best done collaboratively with individuals who can speak to the processes and outcomes related to marketing, recruitment, hiring, role experience, retention, and exit reasons. Questions to discuss to determine causes include:

- What are the challenges the organization is facing in recruiting talent?
- What are the difficulties the organization is facing in hiring talent?
- What are the reasons for individuals not being successful in their role?
- What are the reasons individuals share to explain why they are transitioning roles?



Common Causes of Talent Gap

- There is not enough talent being produced to meet the demand
- There is a lack of awareness around the organization and the role
- There is a skills mismatch among new hires and the role
- There is a skills mismatch across the existing workforce
- The responsibilities and competencies required for a role are quickly evolving

2 Explore Upskilling as the Talent Solution

Once the project team identifies the role of focus, the next step is to ensure launching an upskilling program will address the causes of the talent challenge and is an aligned talent solution.

Validate That the Talent Challenge Can Be Solved Through Upskilling

Upskilling as a talent solution can be utilized in multiple scenarios but are commonly deployed to address the following causes of a talent challenge:

- **Skills Mismatch:** a skills mismatch might exist within the current labor market or be present among new hires entering the organization due to misalignment in what education programs are teaching and what the business needs.
- **Rapid Evolution of Role Requirements:** role requirements might be changing due to a change in scope of responsibilities to meet shifting business demand, the adoption of new technology, or the need for higher levels of education and expertise.
- **Not Enough Talent Being Produced:** there may not be enough individuals entering the education and training programs that align with the role; as a result, there is a quantity misalignment. This presents an opportunity to look at the talent pool of the existing workforce to see if there are pathways from other roles into the role of focus through targeted training.

To support the team in identifying whether upskilling is an appropriate solution, the project team should review the causes of the talent challenge already identified and ask the following questions to understand the alignment with the common scenarios for launching an upskilling program:¹

Do existing and/or new employees hold the KSAs needed to be successful?

- If **no**, upskilling can be an excellent solution by developing a training program tailored to the KSAs that employees do not hold.

Are the KSAs required for the role starting to change or will be changing?

- If **yes**, upskilling can be an excellent proactive solution to develop a training program that is focused on the areas that the organization expects to be different.

Are there existing employees at the organization that could advance in their career into the role of focus with the support of training?

- If **yes**, upskilling can be an excellent solution to spur the development of a career advancement pathway between roles and the launch of a tailored training program that identifies what additional knowledge, skills, and abilities an individual will need.

Are there employees outside the organization that could make a career change or advance in their career with your organization with the support of training?

- If **yes**, upskilling can be an excellent solution to expand your organization's traditional talent pool to other profiles knowing you have a training program that will develop the additional knowledge, skills, and abilities an individual will need.

If upskilling is determined to not be the right talent solution, you may want to consider the development of a traditional talent pipeline to meet your talent needs. [Linked here](#) is a corresponding toolkit that outlines the purpose and approach for developing a talent pipeline program.

¹³ *Is Upskilling Right for You?*, The Aspen Institute, 2017, "<https://www.aspeninstitute.org/publications/upskill-playbook-upskilling-right-company/>" *Is Upskilling Right for Your Company?* - The Aspen Institute

Determine the Outcome of the Upskilling Program

Once upskilling is determined to be the appropriate talent solution, the project team will make decisions around the outcomes of the upskilling program. This is important to have clarity around what the goals of the program are as well as to communicate the vision of the program to leaders during the next steps in the process. The program outcome is defined by determining the following three components:

- The competencies and certification or credential that will result from the program
- The target audience for the program
- The target number of individuals participating in the program

Identifying Competencies and Certification or Credential

The project team will identify the competencies, or KSAs, that are critical to the success of an individual in the role of focus. Developing a robust understanding of the competencies required for the role enables the team to better understand who meets these expectations today as well as what level of future training is needed.

Outlined below is an example of well-defined competencies from a behavioral health program that informed the training and curriculum development. Note there are clear outcomes associated with each competency, communicating what an individual specifically will know or be able to do as a result of holding that competency, as well as a priority level ranking to indicate how important that competency is to the role.

Sample Competencies		
Competency	Outcomes	Priority
Motivational Interviewing	1. Basic knowledge of the model	High
Cognitive Behavioral Therapy (CBT)	1. Basic knowledge of several models of CBT 2. Role play experience providing some basic CBT interventions	Medium
Documentation	1. Class exercises/assignments developing treatment plans 2. Beginning knowledge of common documentation audit finding and the significant consequences for clinician and agency	Low

Competencies are often communicated through a job posting or in a role profile, but it is recommended that the team complete a competency identification exercise (outlined below) specifically for this program. Additionally, the team should expand their thinking to consider all the competencies an individual would have in the best-case scenario, not limiting themselves to what they typically can find in current candidates. The outcome of the exercise will be a list of competencies and any corresponding credentials or certifications that will be the focus of developing an individual in as part of the upskilling program.



Competency Identification Exercise

This exercise is best completed as a group and organized as a brainstorming session with sticky notes and/or whiteboard space for people to share their ideas and then summarize.

Step 1: Identify essential functions 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 additional activities or responsibilities that will arise in the future?
- How will technological advancements influence the scope of responsibilities?
- Are there any activities or responsibilities that will no longer be needed?

Step 2: Determine associated competencies for each role responsibilities

- What does an individual need to know or have the ability to do to be successful in each activity or responsibility?
- Is there a credential or certificate that aligns with these competencies that is required?

Step 3: Develop key learning outcomes and priority level

- For each competency, what are the key learning outcomes?
- For each competency, how important is having the knowledge or ability to complete the daily activities and responsibilities? (i.e., high, medium, low)

Step 4: Understanding the gap (if a skills mismatch is the cause of the talent challenge)

- Review the final competency matrix and identify which competencies and/or key learning outcomes are contributing to the skills mismatch.

Determining the Target Audience

Based on the understanding of the causes of the talent challenge and the competencies needed for the role, the project team will next determine the target audience for the program, answering the question “who will participate?”. Potential target audiences include:

Sample Competencies	
Competency	Outcomes
All staff or an entire department	This may be the target audience if there is a new technology being deployed and all employees need to be able to use it.
A subset of a team	This may be the target audience if a skills mismatch has been identified among only some of your employees. This might be based on a difference in credentials or certifications, an assessment that has been completed, or performance feedback.
Internal employees who are advancing from another role	This may be the target audience when another role has been identified as an excellent pool of talent who can advance in their career with the support of training.
All new hires	This may be the target audience if the project team has identified the need to augment the education new hires are entering with or one of your talent pools is career changers who will need to gain new knowledge, skills, and abilities.

Projecting the Scale of the Program

The final step in determining the outcome of the upskilling program is to project a goal around how many individuals need to go through the program. This is determined by reviewing two data points:

1. What is the quantifiable gap between the number of individuals today in the role who are meeting expectations and how many individuals are needed in the role
2. What is the size of the target audience determined for the program

The project team's analysis of the quantifiable gap will provide an overall, ideal state goal, but the size of the target audience will help to provide a realistic view of how much of that gap can be addressed through an upskilling strategy.

3 Gain Leadership Buy-In to Launch an Upskilling Program

The first two stages of the Discover Phase support the project team in having clarity around purpose and outcome of developing an upskilling program. The last stage of the Discover Phase is to ensure that leadership is supportive of the work, which is important as the designing of the program will likely have impacts on business processes, budget, and capacity.

Define the Program's Value Proposition

At this point, the project team will have clarity that an upskilling program can address the talent challenges and support the talent needs of the organization; however, when socializing a proposal to launch an upskilling program, it is important to be able to quantify the value proposition. Completing an early Return-on-Investment (ROI) analysis is one way that the project team can determine this data point. ROI is focused on three inputs, revenue, savings, and cost, and is calculated by the formula $(\text{Revenue} + \text{Savings}) - \text{Cost} / \text{Cost}$. The table below outlines key questions to ask to develop each component and examples of revenue, savings, and cost components to support in developing your own early estimate of ROI. These will be important questions to consider throughout the program development process as well to complete a final ROI at the end of the project.

Components	Key Questions	Examples
Revenue	<ul style="list-style-type: none">• What revenue is currently being lost that could be regained by having the necessary level of talent?• What new revenue streams could exist due to having a sustainable pool of highly qualified talent?	<ul style="list-style-type: none">• Saying yes to contracts or clients that you are currently turning away• Expanding production lines to offer more services
Savings	<p>What savings will be realized through:</p> <ul style="list-style-type: none">• Higher recruitment conversion rates from knowing you can upskill employees who may not have the exact skill set?• Reduced recruitment time for the role due to internal hiring and advancement?• Less turnover from employees will be equipped for their role and see advancement opportunities?	<ul style="list-style-type: none">• Saying yes to contracts or clients that you are currently turning away• Expanding production lines to offer more services

Components	Key Questions	Examples
Cost	<p>This will be an estimate at this point in time and will need to be updated based on the final program budget</p> <ul style="list-style-type: none"> • What do other training programs cost at your organization? • What is the current training or development cost allocated per person? • What incentives already exist for training reimbursement that could be leveraged for the program? 	<ul style="list-style-type: none"> • The organization provides up to \$5,250 in education reimbursement each year • The organization's training and development team budgets \$2,500 per person

Develop and Socialize the Business Case

The last step in the Discover Phase is to develop and socialize the business case for the purpose of gaining buy-in from key leaders. The project team will need to identify which leaders across the organization need to be aware of the initiative and / or provide approval. A strong business case will share the following information, all of which has been identified through the Discover Phase:

- Summary of the talent challenge: what is the role, what is the demand and supply, and what is the gap between supply and demand
- Outline of the causes of the talent challenge
- Proposal of upskilling as the solution including what is upskilling and how it will directly address the causes of the talent challenge
- Overview of early goals: competencies the program will develop, certifications or credentials participants will gain, the target audience, and program scale
- Sharing of early understanding of the value proposition to quantify the business opportunity in upskilling as the talent solution

Key Learnings

Clearly define the scope of the program and goals, with the understanding that scope may shift because as you learn more in the next phases.

Ensure that the project team represents all relevant perspectives, and necessary leaders have signed off to create internal alignment; without organization-aligned priorities, the program may face barriers in future phases.

Prioritize an upskilling approach if your organization is facing shifting industry needs which require new skill sets and that cannot be addressed through new talent alone. Upskilling programs empower organizations to effectively realign the KSAs of existing employees to meet industry needs.

Next Steps

The Discover Phase aligns the project team and leadership around the goals and outcomes of an upskilling program before program design. The information gathered and organized in the Discover Phase provides a strong foundation for a program to be built from. The next phase, Assess Phase, will equip the project team with more information around the current state of the workforce, potential training programs to partner with, and program design best practices from other upskilling programs.



ASSESS

Summary

The **Assess Phase** is where an employer gathers critical input from those who will be involved with the upskilling program, conducts research to select a training partner, and identifies best practice strategies for program design considerations. The project team will conduct focus groups and send surveys to elicit feedback around interest in participating in an upskilling program, the KSAs that need to be developed through the program, barriers to program success, and other program design components. The feedback from stakeholders and best practice research will enable the project team to be prepared to develop the program map, goals, and strategies as part of the Design Phase.

Phase Outcomes

- Identified motivations and barriers of potential program participants
- Final list of KSAs that need to be developed through the program
- Selected training partner who will lead program delivery
- List of best practice strategies to support program design

Approach

1 *Understand the Interest Level and Concerns of Individuals Who Will Be Participating in and Supporting the Upskilling Program*

- Conduct focus groups and/or surveys with potential program participants
- Meet with managers and leadership teams to discuss ideal state of program design
- Summarize desired program components and barriers to program success to inform program design

2 *Explore Training Solutions*

- Develop criteria to evaluate potential training solutions
- Identify existing trainings that could support program delivery and evaluate options to determine best fit
- Identify internal resources that can be leveraged to support the program

3 *Research Best Practices*

- Identify upskilling strategies that contribute to program success
- Document key learnings to consider for program design

1 Understand the Interest Level and Concerns Of Individuals Who Will Be Participating In and Supporting The Upskilling Program

The first step of the Assess Phase is to ensure a strong understanding of the motivations and barriers of the individuals who will participate and implement the program. Engaging with these individuals creates opportunities for input, feedback, and buy-in around the purpose and vision for the program.

Conduct Focus Groups and/or Surveys With Potential Program Participants

It is important prior to designing the program that the project team meets with potential program participants to understand their motivations for participating in an upskilling program, what type of program would incentivize them to participate, and what their barriers to participating may be. Engagement can come in the form of facilitating focus groups, which provides an excellent forum to set context for the work and build relationships with the individuals, through surveys, which can reach many individuals quickly, or through a hybrid approach of both. To complete this engagement, the project team will need to:

- Identify individuals in the target audience to provide feedback
- Develop talking points to support introducing the purpose of seeking feedback and conduct outreach
- Draft focus group and survey questions
- Facilitate focus groups and/or send surveys
- Document the voices and feedback for review with the project team

Focus group and survey questions should cover four main topic areas (*see sample questions*):

- Interest level in participating in role-focused training and development through an upskilling program
- The competency and skills individuals feel they need to be successful
- Preference for program design components like delivery method (i.e., in person versus online), level of time commitment, and cohort model (i.e., self-paced versus set pace with peers)
- Barriers to participating in a training program and wrap-around supports needed



Sample Questions

1. What would be your level of interest in participating in a program that would prepare you with the skills and knowledge to obtain X credential or advance into X role?
 - What factors are driving your level of interest?
2. What would be your expectations in terms of the structure and time commitment, of a training program?
 - Would you want the program to be in-person? On-line? Hybrid?
 - How many hours a week could you dedicate to participating?
 - Would you want to go through the training with other employees? Or would you want to independently move through at your own pace?
3. What are key components of a training program that would encourage you to participate?
 - What value do you see in a training program such as this one?
 - Is this something you would be interested in?
4. What concerns would you have in participating in a training program? What support would you need to be successful?

Meet with Managers and Leadership Teams to Discuss Ideal State of Program Design

Following the previous action step, it is equally important to gain input from managers who lead those individuals as well as the managers who will be leading individuals who are coming out of the upskilling program. In instances where the focus of an upskilling program is to strengthen the skills of individuals already in a role or to upskill new hires to prepare them for a role, there may not be two distinct audiences. To complete engagement with managers, the project team will need to:

- Identify the managers to seek feedback from
- Develop talking points to support introducing the purpose of seeking feedback and conduct outreach (the Business Case developed in the Discover Phase can be a helpful resources towards this step)
- Draft focus group and survey questions (*see Sample Questions*)
- Facilitate discussions and/or send surveys
- Document the voices and feedback for review with the project team

The focus groups and surveys will validate the skills and competencies managers are seeking to develop or strengthen through an upskilling program. Additionally, the managers will share potential concerns about the target audience participating and discuss the manager's role to make the program successful.



Sample Questions

- How would you describe the general sentiment of individuals on your team towards pursuing further education and training as part of their professional development?
- What additional training or skills do you see your team members needing to [insert your goals for training]?
- What incentives in the past have encouraged your team members to participate in additional training or to obtain a new credential or certificate?
- What barriers have team members encountered in successfully completing training or professional development plans?
- What are successful components of training or professional development programs that you have been a part of?
- What concerns do you have about your team members participating in this program?
- What role do you see yourself playing in fostering success among participants in the program?

Summarize Desired Program Components and Barriers to Program Success to Inform Program Design

Following discussions with potential participants and managers, the project team will need to review the voices and feedback shared and summarize the information into key takeaways. Key takeaways represent the common themes across each question and the high priority feedback from the project team. The key takeaways will be instrumental in informing program design elements like program structure, pace, needed wrap-around supports, and potential barriers that the project team will need to solve for when designing the program experience in the next phase.



Sample Key Takeaways

- There is alignment among healthcare professionals on the competencies necessary to provide care.
- The training program model needs to provide flexibility for healthcare professionals to complete at their own pace to incentivize participation.
- Healthcare professionals need opportunities for on-the-job application of skills and real-time feedback to be successful.



Once the team has agreed upon the takeaways, develop a memo or report documenting feedback, questions asked, a summary of the voices you heard, and a list of your key takeaways. This resource will be helpful not only in the Design Phase process to ensure that you have a reference document for design inputs but can also serve as a great way to update leadership on your progress and rationale for the program design.

2 Explore Training Solutions

The next important component of the Assess Phase is to identify a training solution to build the program around. The decisions made by the project team as part of the Discover Phase around the outcome of the upskilling program, including the competencies of focus and the resulting credential or certification, will help to guide and inform the selection of the training solution.

Develop Criteria to Evaluate Potential Training Solutions

Before the team begins to explore and evaluate potential training solutions, the project team needs to determine criteria, define the ideal state outcome for that criteria, and the associated level of importance (i.e., high, medium, low) that will enable decision-making around which training solution is a strong fit to the program's needs. Evaluation criteria for the team to consider includes:

- **Alignment to competencies and credential or certification**
- **Length of training**
- **Cost of training**
- **Type of partner: internal versus external**
- **Previous partnership experience**
- **Ability to tailor existing program**

Identify Existing Trainings That Could Support Program Delivery and Evaluate Training Options to Determine Best Fit

Once the project team has developed criteria for selecting a training solution, research will need to be completed about existing training programs to gather information that speaks to each criterion previously identified. The project team should search across a wide variety of sources to identify potential training solutions:

- **Internal training:** the organization might have existing training programs or standalone training courses that provide some or all the desired competencies.
- **Private or individual instructors:** an organization may consider contracting with an organization or individual expert to provide specialized training in the target areas.
- **Academic institutions:** teams should assess whether existing coursework or credentials at academic institutions correspond to the desired competencies for their program.
- **Industry organizations:** public, private, or non-profit in institutions specializing in the field in question may offer training in the target competencies.

When evaluating training programs once the project team has identified potential training solutions and researched the information that corresponds to the selection criteria, the project team will want to convene to first evaluate and assign a fit score for each criteria for each program. This could be a simple "0, 1, 2" or "high, medium, low" scale that indicates alignment between the information gathered and the project team's vision for each criterion. The following questions will support the project team in completing an evaluation and assigning a score.

- Alignment to competencies: *How well does the training program train in the competencies of focus? Are there any competencies that won't be addressed through the training?*
- Length of training: *How long is the training in its current state? How does that align with the project team's vision for the length? Can the length be adapted?*
- Cost of training: *What is the training cost per person? How does this align with current budgeting of training dollars per person? How does this align with the project team's vision for cost?*
- Type of partner: *Is the program an internal program? What new capacity would be needed to run the program? Is the program external? What type of agreement or contract would need to be developed to partner?*
- Previous partnership experience: *Has the organization previously partnered with the training provider? If so, what were the outcomes and the experience?*
- Ability to tailor existing program: *What level of customization is available?*

Once a fit score is assigned, the project team will then need to review the evaluation and select a training program they would like to move forward with. If the training program selected is external to the organization, the project team will need to conduct outreach, share their vision for partnership, and secure commitment from the training provider to partner prior to launching the Design Phase.

Identify Internal Resources That Can Be Leveraged to Support the Program

The final component of exploring training solutions is to identify and document what resources already exist internally at the organization to support the training design as well as to support individuals in being successful during the program.

Examples of internal resources to support program design include policies that allow for a specified number of hours to be dedicated to professional development or training, tuition and training reimbursement dollars, and productivity requirements for roles that may need to be revised to enable dedicated training time.

Examples of internal resources to support participant success in the program include mentorship programs, access to childcare or basic needs supports, available funding for training materials and equipment, and part-time versus full-time hours requirements that may impact the flexibility of hours to utilize towards training while not losing benefits.

3 Research Best Practices

The final step in the Assess Phase is to look externally at strategies that other organizations or programs have deployed when designing upskilling programs that have resulted in success for the program and individual participants.

Identify Upskilling Strategies That Contribute to Program Success

Prior to the project team starting research around upskilling program best practices, it is important to define the topics of interest to scope the team's review of how other upskilling programs work. It is recommended that the topics align with the components of the program that you will be designing which include marketing and recruitment, selection, program experience (i.e., assessment, training plan, training program, and wrap-around services), completion and credential, and program sustainability. When reviewing programs through the lens of each of these topics to identify best practices, it is important to document **what the strategy is that a program deployed, how they implemented the strategy, and why it was successful**. If the project team finds a particularly relevant upskilling program, consider scheduling an interview with the program to learn more about the program design and lessons learned from the process.

Document Key Learnings for Program Design

Similar to the conclusion of the first step of the Assess Phase, it is important that the project team documents the best practices that are identified through the research, organizing it around the topics (i.e., Marketing and Recruitment, Selection, etc.) for easy reference during the Design Phase. A Best Practices Report can serve as a bank of strategy ideas when the project team is developing strategies for how each part of the program will work in the next phase. It is important to note that not all best practices must be adopted. There might be some best practices that the project team seeks to directly adopt, there might be some best practices that the project team sees value in but recognizes the need to adapt to the organization's specific needs, and there may be some best practices that do not make sense for implementation but were important to consider.

Key Learnings

Engaging program participants through focus groups and stakeholder interviews provides critical insight to ensure the program is desirable to employees and aligned to an organization's needs.

Developing robust criteria to evaluate potential training solutions against enables an efficient training selection process and confidence among the project team and leadership in the decision.

Considering best practices from existing upskilling programs helps to equip the project team with ideas around program design in advance of starting the design process and starts to provide clarity around how the program could work.

Next Steps

The Assess Phase results in an understanding of the perceptions and attitudes of employees and managers towards an upskilling program and what considerations the project team will need to pull forward into the Design Phase. Further, the project team will have a selected training provider, which may be internal or external to the organization. Finally, in preparation for the Design Phase, the project team will have an early look at potential strategies to include in the program design as a result of completed best practices research. All of these components prepare a strong foundation leading into the Design Phase, where the project team will develop the goals and strategies for how the program works.



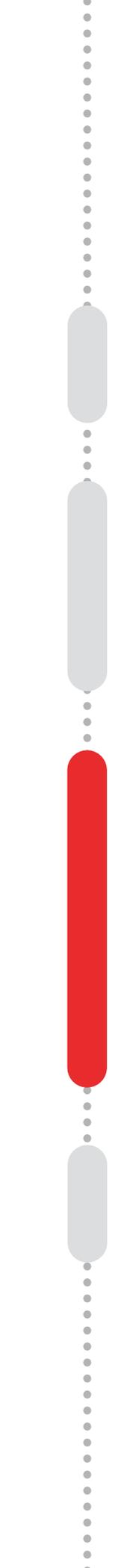
Best Practice Examples

Customize wraparound support services to fit the unique needs of participants.

Adjusting the support services to fit the needs of the participants is more effective than providing the services perceived to be needed. Typical services in these areas include academic support and personal life support.

Explore local, state, and national funding options for additional training.

Securing additional external funding allows the employer to support the participants, ensure adequate staffing, design additional support resources for participants, and eventually grow the program. By engaging with local and regional funders, the employer can encourage champions of the training program, as well as additional training and career advancement pathways



DESIGN

Summary

The **Design Phase** is focused on building the program framework. It includes drafting the program vision and mission, and developing the goals and strategies to achieve that vision. The Design Phase also outlines the change management and implementation considerations to support a successful program launch. Upon the completion of this phase, the project team will have a designed program and will be prepared to begin program launch as part of the Launch Phase.

Phase Outcomes

- Finalized objective, purpose, and desired outcomes of the organization's upskilling efforts
- Developed goals to define program success
- Established strategies to advance and achieve the program goals
- Drafted implementation plan to support launch

Approach

1 *Define Vision and Mission*

- Establish objectives and outcomes for the mid-term and long-term future
- Declare program's core purpose and focus

2 *Develop Goals and Strategies*

- Determine the key priority areas that define the upskilling program
- Define quantifiable goals and strategies with actionable steps for each priority area

3 *Outline Implementation and Change Management Plans*

- Identify key communications to successfully implement programmatic elements
- Draft and finalize the necessary strategies to ensure a smooth implementation
- Establish expectations and responsibilities for each stakeholder to understand process changes

4 *Document Program Design*

- Draft deliverables to support program communication, awareness, and implementation of the program launch
- Assign project owners to establish a clear timeline and the tasks to be completed before launch

1 Define Vision and Mission

The vision and mission statements set the foundation for what the organization would like to achieve with the upskilling program. Together, these statements explain why the program exists and how the program will operate.

Ascend defines **vision** as an aspirational description of **what a program would like to achieve or accomplish in the mid-term or long-term future**. The vision should be clear and simple, avoiding any jargon or buzzwords. To determine the program vision, the project team can consider the following questions:

- What is your ideal end state?
- What would success look like?
- What needs to be changed?
- Why should these issues be addressed?
- What will the organization find compelling?

Ascend defines **mission** as a **declaration of a program's core purpose and focus that normally remains unchanged over time**. As the project team develops the mission statement it is important to keep in mind that this is not the "why" but rather the "how" of the program. It is meant to be ambitious, exciting, and easily understood by the reader. The following questions will help the project team determine the program mission statement.

- What problem or challenge are you seeking to address?
- How will you do the work?
- What is unique about how you do the work?

Developing the program vision and mission serves as the guiding framework for the program, enabling the project team to draft high-level goals and strategies that remain in alignment with overall project priorities.

2 Develop Goals + Strategies

This phase of work is characterized by a series of project team meetings to develop quantifiable goals and strategies within each of the upskilling priority areas. **Program goals** are quantifiable targets associated with a specific outcome of a series of strategies. They represent what the outcomes are if the strategies are implemented successfully. **Program strategies** are high-level actions that outline the how a goal will be achieved.

Finalize Priority Areas

To launch into the design process, the project team will first finalize the key priority areas that will define the model of the upskilling program. The program **priority areas** provide structure for the program and answer questions related to how this work will happen. Each priority area focuses on a targeted area of program development including how employers will market, recruit, select,



Sample Vision and Mission Statement

Catapult Indiana is a training program that allows students to explore real-world problems in Advanced Manufacturing and logistics while learning about the demands and opportunities in the field and giving them the skills to grow into leadership roles with Indiana companies.

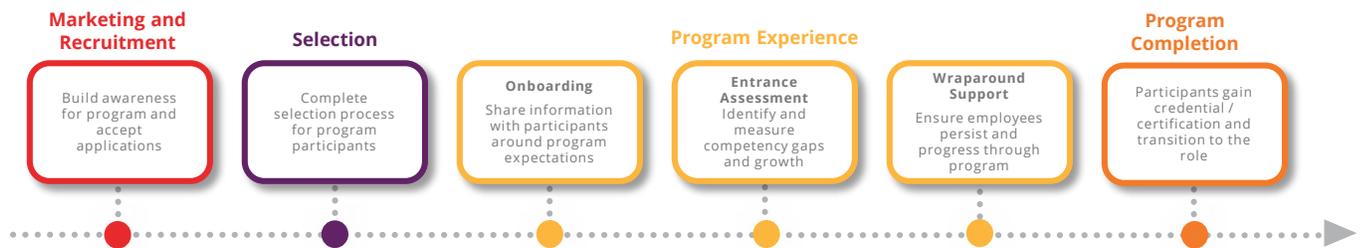
Catapult's Vision:

To attract and develop low-skilled workers into high-quality talent for production roles and to position them for long-term career opportunities in manufacturing.

Catapult's Mission:

To offer a state-wide training program for unemployed, underemployed, and post-release Hoosiers that results in graduates receiving a certificate of completion that ensures access to manufacturing employment opportunities.

matriculate, train, and employ candidates. The project team should utilize the priority areas to develop a program map, capturing the high-level vision for how a program participant will move through each priority area and the milestones by when a participant will complete them. The program map will gain more definition through the development of specific goals and strategies. By breaking down a complex project into a concrete set of priority areas, the project team can focus on one aspect at a time. Outlined below is an example program map where milestones and timelines can be added based on the vision for the program design.



This is also a key point to identify relevant individuals within the organization outside of the project team that should be a part of the process of developing goals and strategies for each priority area. Stakeholders may include those with a particular skill set for the process or those with decision-making authority. Once stakeholders are identified they should be convened strategically throughout the process to best use their knowledge and contributions.

When the project team has aligned on overall priority areas, socialized the priority areas with relevant stakeholders, and incorporated all additional feedback it is time to move forward with a series of meetings to develop the goals and strategies.

Draft Goals and Strategies by Priority Area

The priority areas in this Toolkit include marketing and recruitment, selection, program experience, program completion, budget, and program sustainability. These priority areas highlight the components that Ascend has found are critical to the success of building an upskilling program.

The following section walks through the definition, key design considerations, and sample goals and strategies for each of the priority areas. While the Toolkit presents these priority areas in the order that a program participant experiences them, it is recommended that the project team begins their planning with Program Completion and work backward through each priority area. This allows the project team to begin with a complete understanding of the program’s outcomes and build the goals and strategies for each priority area to align with those outcomes.



Marketing and Recruitment addresses how the project team will introduce the program to increase awareness and build interest among the target audience to encourage participation in the upskilling program. Goals and strategies for this priority area center on building an understanding of how each audience needs to be engaged and what information they need to understand. Example

audiences include the organization's leadership, directors, program managers, and the target audience itself. If an external training provider is selected, audiences external to the organization will need to be identified as well.

The following questions may be considered when identifying target marketing audiences:

- Who will be targeted for participation in the program?
- Who are key stakeholders that will influence their participation (such as managers)?
- Which organizational leaders need to know about the program? Who is positioned to make decisions that impact the program?
- Who will be supporting the facilitation of the program?

Once audiences are identified, strategies will need to be developed by audience leveraging an understanding of the best communication channels and a developed set of targeted messaging to reach each audience. Strategies will likely span multiple communication methods, including in-person, social media, and electronic.

Selection encompasses the process of screening, selecting, and notifying employees who for program participation. The project team will first want to set a goal for how many individuals they are targeting to participate in the program or per cohort. It is important to consider both the size of the target audience and the capacity of the program to manage a specific program size. Additionally, it is recommended that a project team select more candidates than will go through the program so that you are accounting for individuals who decline to participate and decide not to start the program. Upskilling program sizes vary, but on average a common cohort size is between 15 and 30.

Once the selection goals are developed, the project team will need to determine the approach to selection: will employees self-select in by engaging in a selection process or will employees be identified by the organization as needing to participate. Irrespective of approach, both selection criteria and a selection process will need to be developed.

To develop selection criteria, the project team will determine who the ideal candidate is by identifying the education and skills background, level of experience, and professional characteristics that are important for an individual to have prior to entering the program. Additionally, eligibility to participate in the program might be limited to individuals in a specific role or function. The target audience identified previously will be an important starting point to defining the ideal candidate.

To develop the selection process, the project team will determine the milestones in the process, the timeline, and the owners. A common selection process for where individuals are applying includes the following milestones: program lead designs and launches program application that aligns with selection criteria, candidate submits program application, program lead reviews applications and selects candidates for interview, program lead interviews candidates, and final selection decision and notification.



Marketing and Recruitment: Sample Goals + Strategies

Sample Goals

- Number of employees who receive program information
- Number of employees who apply for the program
- Employees understand the value of the program
- Leadership and management can articulate the value of the program

Sample Strategies

- Ensure all leadership + program managers understand and can communicate the value of the program
- Support a coordinated program launch utilizing audience specific internal communication methods
- Develop a comprehensive marketing + communications calendar

To support the development of the selection criteria and selection process, consider the following questions:

- What information about a candidate is important to know to evaluate their alignment with the selection criteria?
- Is there an assessment needed as part of the selection process to understand the current state of each individual's competencies?
- How will the application be shared with candidates?
- Is an interview with a candidate necessary?
- When (and how frequently) will selection take place?
- Who leads forward the selection process?
- Who holds the final decision making on who is selected into the program?
- Who will notify employees that they have been selected?



Selection: Sample Goals + Strategies

Sample Goals

- Number of employees interviewed for the program
- Number of employees selected for the program

Sample Strategies

- Design program application
- Develop interview and assessment questions to facilitate selection process
- Outline interview process with clear milestones and owners
- Communicate the selection process for interested caregivers to join the program

Program Experience involves the pathway a program participant takes as they are in the upskilling program. As a result, the program experience represents multiple components: onboarding, the training experience, and the wrap-around supports. Similar to previous priority areas, the project team will first develop goals that represent success in completing the program experience. This should include the targets around how many individuals participate in the program, how many individuals complete the program, and other metrics that will evaluate how well individuals are supported in their experience.

Once the program experience goals are developed, the project team will develop strategies for each program experience component. If an external training provider was identified as a training partner for this program, it will be important to have them participate in all program experience discussions. Additionally, it will be important to reference back to the key takeaways from the Assess Phase as well as the Best Practices Report when brainstorming the strategies needed for a successful upskilling program.



Program Experience: Sample Goals and Strategies

Sample Goals

- Number of individuals who are actively in the program
- Number of individuals who persist to complete the program
- % of participants who shared they felt supported throughout their program experience

Sample Strategies

- Design onboarding for the program that communicates expectations, outlines the program experience and
- Partner with selected training provider to develop on-the-job responsibilities that align with the learning in the program



The program team will want to start by defining the **training experience** as this is the core part of the program. The training experience is designed by mapping courses, modules, and on-the-job learning to the competencies and credentials of focus for the program and organizing it in a sequence that enables for progressive learning. If there is an existing training program that the project team is looking to adapt, the mapping exercise will consist of identifying which competencies are already covered by the program and which competencies are not addressed to elevate where training needs to be revised or additional content needs to be created. If the project team is building a new program, they will need to discuss for each competency the approach to learning, will it be through instruction or on-the-job learning, and to align on the process and owners to develop the content. This is also the part of the process where the project team determines the program length, if the program will be delivered in-person, online, or a hybrid setting, if an individual can move through at their own pace or if all participants move through together, and other design components as elevated through feedback in the Assess Phase.

Throughout the process of developing the scope and sequence of the training, the project team will want to document tools or materials that are needed, any capacity considerations, and all budget implications.

The next component of the program experience to design is the **program onboarding**. The purpose of onboarding is to ensure that program participants are clear on the expectations of the program as well as have all the information they need to start the program. This can be as simple as a one-to-two hour meeting or as engaged as a multi-day intensive. The length and design will be dependent upon the scope and level of information the project team sees as necessary for participants. Another consideration for program onboarding is around whether there is the need for an early assessment of the competencies of participants prior to them starting the program. An **entrance assessment** is a tool that can be leveraged to identify and measure a specific employee's competency gaps and compare them against those that will be developed in the program. This tool is most helpful when a program is seeking to tailor the training to each individual employee.

The final component for the project team to develop is **wraparound supports**. These are supports or services employees may need during their time in the program and may include support for securing childcare, flexibility or alternative working hours, and securing technology and materials. The goal of wraparound supports is to ensure employees can access and more easily participate in the training program. The strategies should be informed by the barriers that focus group and survey participants shared and best practices for how other upskilling programs

Program Completion addresses how the employee will complete the upskilling program, what credential or certificate they will earn, and how they will transition into their new role (if applicable) within the organization. While the project team has already selected the certification or credential for the outcome of the training in the earlier phases, this discussion will be focused on setting goals for how many participants receive the certification or credential and developing a process to support employees in securing it. Questions to consider when developing support and process strategies for program completion include:

- If there is a certification or credential at the end of the program, what preparation do individuals need to secure it (i.e., exam, application)? As an employer, how can I be supportive with materials, time, or funding?
- What other support will be provided to employees who complete the program to ensure long-term success following training?
- If an employee is advancing into a new role, what process needs to be developed to ensure there is an opening and support the transition?



Program Completion: Sample Goals and Strategies

Sample Goals

- Number of individuals who demonstrate skill proficiency
- Pass rate of employees for credential or licensing exam
- Number of employees successfully earning credential or license

Sample Strategies

- Assess growth by comparing initial skills baseline to final assessment
- Provide exam preparation and study guides for employees to prepare for the certification exam
- Establish career pathway for employees to continue training and professional development
- Outline knowledge, skills, abilities, and expectations for employees with new responsibilities

Program Sustainability focuses on developing a governing body and support structure to guide and promote the long-term sustainability of the program. The project team will work to identify who will oversee and provide operational guidance for the program, who will lead and facilitate the program at an operational level, and who will support the facilitation of the program. The governing body may have varying structures depending on your organization. A recommended governance structure is listed below.

- **Steering Committee:** Governs the program's goals and strategies and provides strategic oversight for the future direction of the program.
- **Program Director:** Owns the outcomes
- **Project Team:** Executes the day-to-day operations of the program.
- **Participant Managers:** Support the Director and team in checking in with participants during the program.

Questions to consider when developing the program governance are below.

- Who is positioned to make decisions that could impact the program?
- Who can best advocate for the program within the organization and leadership?
- Who is best positioned to operationalize and facilitate the program?
- How often and when do these individuals need to meet?



Program Sustainability: Sample Goals + Strategies

Sample Goals

- All governance stakeholders can articulate the purpose and goals for the program
- Number of steering committee meetings held in a year

Sample Strategies

- Conduct an annual program survey to evaluate each priority area against their respective goals and strategies
- Develop an annual calendar for governance meetings and check-ins

Budget summarizes all expenditures required to implement the strategies in each priority area. It includes only costs that would not otherwise be incurred by the employer. After each priority area is defined, the project team should identify and quantify all budget implications. A sample budget template with sample costs and a column for cost estimates is included below.

Sample Budget Costs to Consider	
Component	Cost
Marketing and Recruitment	
Marketing materials (Costs may include materials needed to draft program communication, develop communication presentations, and coordinate internal outreach)	
Selection	
Selection materials and supplies (Costs may include materials needed to draft and communicate information, develop selection rubric, and coordinate meetings)	
Program Experience	
Program Director's Time Specific to Program Management (To estimate program directors' time, consider how many hours per week the director will spend on program management and allocate a percentage of their salary accordingly)	
Training Instructor's Salary	
Training Materials (Costs may include technology upgrades or purchases, software, books, equipment, classroom space)	
Participant Financial Incentive (If determined for participation)	
Study Guide Materials (Study guide materials may be included with the cost of the training program, or there may be little to no cost study materials available online)	
Program Completion	
Credential Practice Exam (Search for free online practice exams as well as paid resources)	
Credential Exam Fees	
Licensing Fees	
Program Sustainability	
Continuing Education/ Professional Development (Consider costs for continuing education credits or for re-examinations)	
TOTAL	

3 Outline Change Management and Implementation Plan

Understanding how the upskilling program will impact the current processes within an organization, as well as the implications for the stakeholders involved in those processes is the final step in the Design Phase. Developing change management and implementation plans are different approaches driven by the need to plan for the next steps to have a successful program launch.

For the **change management plan**, the project team should review each strategy and align on organizational changes and key communications that must occur for programmatic elements to be implemented successfully. The questions and sample change management table listed below can aid the project team in identifying and documenting the change management implications.

- What changes are being made to the existing processes and activities?
- What new processes and activities are being introduced?
- Who is affected by the changes? How are they affected?
- What is the level of impact on each of the stakeholders affected?
- What strategies will be leveraged to notify and support the affected parties?
- When will the changes be communicated?

Sample Change Management Plan				
Strategy	Process Change	Impacted Stakeholders	Level of Impact	Sample Actions
Provide resource toolkit to support participant managers to adapt team operations when participants are in training	<ul style="list-style-type: none"> • Shift existing priorities + delegate responsibilities accordingly • Determine changes in production or outcome goals 	<ul style="list-style-type: none"> • Human Resources • Team Managers • Operations 	High	<ul style="list-style-type: none"> • Collaborate with managers to quantify the potential loss in team production with employees participating in upskilling • Connect with operations and human resources to discuss resources and options to support participant team due to changes in staff capacity
Launch a new work hours structure to allow staff members to work part-time hours while receiving full-time pay and benefits	<ul style="list-style-type: none"> • Coding of staff for benefits • Shift scheduling approach 	<ul style="list-style-type: none"> • Human Resources • Team Managers 	High	<ul style="list-style-type: none"> • Meet with HR team to share the strategy and discuss approach to ensure staff do not lose their full-time benefits • Meet with team managers to communicate the “why” behind the strategy and discuss solutions to ensure they have the staff they need to support the work

For the **implementation plan**, the project team will determine the immediate next steps that are needed to operationalize the strategies for each priority area, including the owners and the timeline for completion. Documentation for the implementation plan includes action steps, implementation task start and end dates, owners, priority level, and the status of each task; each task should be labeled and organized first by priority area and then by its target date for completion.

Sample Implementation Plan by Priority Area

Task	Target Completion Date	Owner	Priority Level	Status
Marketing and Recruitment				
Draft audience-specific messaging for prospective participants, managers, and organizational leadership to understand the program experience and outcomes	January 31	Project Team + Marketing Department	High	In progress
Selection				
Initiate application process to establish experience requirements (tenure, position, etc.) for eligible participants	March 1	Project Team	Medium	In progress
Program Experience				
Distribute course materials to participants that outline training objectives and timeline to meet skills expectations	March 15	Project Team + Participant Manager	High	Not Started
Launch feedback loop where participant managers and the project team can align on participant's progress				
Adapt team schedules and responsibilities to allow for employee training				
Program Completion				
Select a final competency assessment tool to track individual progress	December 31	Project Team	Medium	Not Started
Create a career pathway progression based on skills attainment and advancement				
Program Sustainability				
Identify internal stakeholders from across the organization	Ongoing	Steering Committee	Medium	Not Started
Convene key stakeholders to review the progress of strategy implementation and provide feedback for the path forward				
Budget				
Evaluate initial costs for each priority area to launch the program for Year 1	Ongoing	Steering Committee	Medium	Not Started

4 Document Program Design

Prior to wrapping up the Design Phase, it is recommended that the project team document the goals, strategies, change management plan, and implementation plan into one deliverable, strategic plan, to support program launch and implementation. Additional deliverables, executive summary and overview presentation, can be developed to enable building awareness around the program and socializing with leadership. Outlined below is additional description around the recommended deliverables.

A **Strategic Plan** is 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.

The **Executive Summary** is a condensed, written account of the partnership, including a summary of the need, causes, vision, priorities, goals, and corresponding strategies.

An **Overview Presentation** is 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.



Key Learnings

Engage **program participants and internal stakeholders throughout the process of designing the program** to ensure that the program priority areas remain aligned with the needs of program participants.

Leverage **existing systems within the organization** (such as existing time dedicated to training) to lessen the need for changes to existing processes and expectations.

Evaluate **change management implications as you design the program** to support strong planning prior to program launch.

Next Steps

The Design Phase results in well-defined program priority areas, structured program model, and key deliverables for guiding the upskilling project. Following the completion of the Design Phase, the project team and others will develop a structure for launching the upskilling program, through communications strategies, to ensure a successful program launch.



LAUNCH

Summary

The Launch Phase is the final step in program development and is where an employer focuses their actions on building the program. The implementation plan developed in the Design Phase is the guide for what actions are needed to deploy each strategy. The project team will identify the high-priority and immediate steps in the plan that must be acted upon quickly to start the program, will engage the owners of the action steps, and will ensure there is a clear timeline for completion. The Launch Phase is also where the employer makes an official announcement of the launch of the program.

Phase Outcomes

- Completed implementation steps to build program
- Launched upskilling program

Approach

The steps for completing the Launch Phase involve a series of meetings with the project team to assess key change management implications, strategies and appropriate communications representatives to determine the scope of the communications strategies.

Key activities include:

1 *Begin taking actions against implementation steps*

- Identify high-priority and near-term action items, including change management strategies
- Engage implementation owners
- Outline key timelines

2 *Announce program launch*

- Finalize program launch messaging
- Deploy internal and external communication strategies

1 Begin Taking Actions Against Implementation Steps

Identify High Priority and Near-Term Action Items

The Change Management and Implementation Plans completed as part of the Design Phase provides the team with an already defined list of actions that need to be completed to launch the program. To support the scoping of immediate next steps, the project team will need to review each plan and identify a focused sub-set of actions that were indicated as high-priority to address as well as those with a near-term (within the next one to two-months) deadline. This will support the team on focusing their initial efforts in launching the program. Once the first set of action items are completed, the project team can continue to move through the implementation plan with the medium and low-priority items and those will have a longer timeline for completion.

Engage Implementation Owners and Confirm Key Timelines

Once a focused set of high-priority and near-term action items are identified, the owners will need to be engaged to communicate the next steps and expected timelines. These discussions should focus on communicating clearly what is needed, why it is important to the program, the expected outcome of the action item, and the target completion date. Further, this is an opportunity for the owner to escalate any resource or capacity needs they may have in executing against the action items.

This process should be repeated as more action items are pulled forward from the Change Management and Implementation Plans.

2 Announce Program Launch

Develop Program Launch Communications Plan

The program launch provides an organization with the opportunity to share the development and launch of the upskilling program with internal and external stakeholders. The first step is to determine the target date to launch the program and develop a corresponding communications plan that outlines the scope and goals of the communicating about the program. Outlined below are key questions to support the team in developing the communications plan and a communications plan template with examples:

1. Who are the target audiences? Consider: Do you want to share information about this program just within your organization? Or do you want external audiences to know about it as well?
2. What are the communication goals for each audience? Consider: what do you want each audience member to learn or know?
3. What messaging is needed to support your goals? Consider: what talking points would you use with each audience?
4. What communications strategies will support the successful launch of the program with each target audience? Consider: what are the various types of ways you can share the information with each audience?
5. Who will own the communication strategies? Consider: Who is best positioned to execute against these action items?
6. What is the timeline for deploying the strategies? Consider: Based on the program launch date, when should the communication occur?

Sample Communication Plan

Audience	Goal	Strategies	Owner	Timeline
Employees	All employees know about the program	Send company-wide email	Communications Team	On launch day
		Include feature story in team newsletter	Communications Team	Next newsletter date
		Launch an internal website	Communications Team	Prior to launch day
Employees who are the target recruitment audience	Employees know about the benefits, how to sign up, and who to go to ask questions	Send targeted emails with detailed program information and one point of contact for questions	Program Manager + Communications Team	Week after launch day
		Hold a lunch information session	Program Manager	One month after launch day
Workforce development partners	Elevate the importance of an upskilling strategy and share about leadership in the space	Host a lunch and learn session	Program Manager and Communications Team	Six months after launch

Design Program Launch Messaging Materials

The communications plan necessitates developing messaging materials to support the program launch. The team will need to identify and summarize the messaging materials needed for each communication strategy developed and then engage with the right owners to support the design of those materials. This step in the process typically requires the engagement of the marketing and communications team at the organization. Once owners are identified, it will be important to define the timeline for when materials are needed by to support the strategies.

Some examples of messaging materials that may need to be developed include:

1. Formal press release
2. New logo for the program
3. Website for the program
4. Op-ed alongside program partners



Deploy Internal and External Communication Strategies

Once the communications plan is finalized and the materials are developed, the owners of each strategy will move forward with executing against the identified strategies on the agreed upon timeline. The project team should identify key milestones for check-ins to ensure that the plan is on-track, to identify additional communications needs, and to escalate any support needed.

Key Learnings

Communicating **changes in processes or expectations with the individuals who will be impacted as early and clearly as possible** will allow them to plan accordingly and ensure smooth implementation.

Considering the **communications goals of the various audiences is necessary** for developing a launch plan that is comprehensive and meets the needs of everyone involved.



Conclusion

The labor market continues to rapidly evolve. Employers need new tools and strategies to attract and retain a qualified workforce. Individuals need access to ongoing training and support. Upskilling will be a critical talent strategy to consider as it enables employers to respond to changing roles and responsibilities and tailors training to specific roles. Overall, upskilling programs benefit all stakeholders: employers build a sustainable talent pipeline, employees secure the skills they need to secure a good job, and communities have greater opportunities to thrive.

The four phases outlined in this Toolkit are designed to equip employers who are seeking to launch an upskilling strategy with a roadmap to build an upskilling program. If you are seeking additional support in the creation of your upskilling program, Ascend Services is available to serve as a resource. To learn more and contact us, visit ascendindiana.com.

Ascend Indiana would like to thank the Richard M. Fairbanks Foundation for their generous support in creating this toolkit. In addition, Ascend is grateful to the many partners including employers, education institutions, and others that provided feedback and input on the content.