

WIRED Regional Assessment Matrix

March 3, 2006

Purpose: The purpose of the Regional Assessment Matrix is to create an objective framework to assist ETA and Regional Teams with prioritization and tailoring of technical assistance plans and resources in support of their WIRED projects.

Intended Uses: The Regional Assessment Matrix will be completed jointly by the ETA and Regional Teams and has two intended uses:

- To better understand and clarify the issues identified in the proposal
- To quickly identify the most critical areas in need of technical assistance and resources.

During the initial phase of the WIRED project, the Matrix will be the working document for collaboration between ETA and the regional partnership to identify specific technical assistance. Each area of the Matrix includes topics designed to guide the discussion on technical assistance and resources. In addition, each area includes a description of activities and factors that could be considered “ideal” relating to regional transformation and innovation.

Completion of the Matrix will also be informed by the proposal content and regional profiles which have been developed by the ETA team. Beyond potential technical assistance, the notes/comments section can convey important issues or opportunities and other relevant information. From the Matrix, an operational plan for technical assistance and resources for the WIRED region will be created.

Areas/ Capacities Assessed: The Regional Assessment Matrix covers five areas / capacities that correspond to the requirements listed in the SGA, including:

- Regional Partnership / Leadership Team Capacity
- Regional Strategic Approach Design
- Regional Strategic Implementation and Institutionalization
- Regional Innovation Assessment
- Federal, State and Local Resource Leverage

Timeframe: The initial assessment will commence (ENTER DATES and SET COMPLETION DATE)

WIRED Region Assessment Summary

Area/ Capacity	Recommended Technical Assistance and Resources	Lead TA Member	Support TA Member
Regional Partnership Capacity			
Regional Strategic Approach Design			
Regional Strategic Implementation and Institutionalization			
Regional Innovation – Talent, Innovation and Investment			
Federal, State and Local Resource Leverage			

Regional Partnership Capacity

Discussion	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
<p>Regional Partnership Representation</p> <p>Are all key regional innovation assets and institutions represented in the partnership?</p> <p>What has been the role of participants in dealing with prior efforts to revitalize or transform the region?</p> <p>How well networked are the people and organizations in the partnership?</p>	<p>Diversity of Sectors/ Representation</p> <ul style="list-style-type: none"> • Business companies (emerging and mature, small and large) • Trade Associations • Academic (university, community college, adult education providers, K-12) • Civic (technology councils, business coalitions and leadership groups) • Investors • Labor unions (depends on prominence in selected region) • Business support/ service providers (attorneys, bankers, recruiters, accountants) • Entrepreneurs (start-up companies) • Philanthropic (foundations) • Government (i.e., Governor’s office, state legislature, local government, workforce, economic development entities) • CBO/FBO <p>Industry representation</p> <ul style="list-style-type: none"> • Representation from traditional manufacturing, advanced manufacturing, service, and high technology industries (e.g. biotechnology, information technology, small, medium and large businesses) <p>Geographic (Regional Boundaries)</p> <ul style="list-style-type: none"> • Leadership from many of the cities, counties, regions or states are represented (depends on how regions are defined) • Traditional boundaries or new approaches • Other funded project or initiatives that are not mentioned <p>Project Team Roles</p> <ul style="list-style-type: none"> • Descriptions, goals & objectives for project lead; administrative support; data gathering, analysis and reporting; communications 	
<p>Regional Partnership Leadership</p> <p>Is the partnership comprised of senior level decision makers?</p>	<ul style="list-style-type: none"> • Senior level position in organization – decision makers • If retired, well respected with strong community networks • Able to foster community buy-in and recruit broader group of leadership 	

Discussion	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
To what extent are partners contributing resources to the effort?	<ul style="list-style-type: none"> • Commitment (willing to give time, reputation, skills or experience, and money) • Examples of project they supported that demonstrate risk taking. 	
<p>WIRED Project Management</p> <p>Are roles/goals well defined for each of the partner organizations?</p> <p>Is there a clear plan for staffing the WIRED project, including recruiting?</p> <p>Does the partnership have a structure in place to capture the information for its status reports to DOL?</p>	<ul style="list-style-type: none"> • Committed leaders for each organization involved in WIRED (org and responsibility charts) • Clearly outlined roles/goals for each organization • Funding structured to result in achieving outcomes of WIRED initiative • Organizations have sufficient capacity and skills to complete the project • Identification of strengths and weaknesses of each participating organization • Strategy for capacity building • Strategy for replacement/ growth • Organizational development plan 	

Regional Strategic Approach Design

Discussion	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
<p>Regional Economic Analysis</p> <p>Is there a thorough economic analysis that supports the WIRED strategy?</p> <p>Has an economic/workforce assessment been completed in the past three years?</p>	<ul style="list-style-type: none"> • Economic analysis completely supports strategy design • Data/ analysis covers targeted industry and other key industries as well; there is a clear picture of the region’s historic economic and labor market conditions (short and long term) • Analysis includes industry trends within the region and a comparative assessment with relative other regions. • Gap analysis of workforce skills is demand based, and conducted with input from industry, education and government practitioners 	
<p>Economic and Workforce Analysis</p> <p>Is there an overarching economic development strategy in place for the region as a whole?</p> <p>How does the proposed WIRED strategic approach build off of the economic development strategy?</p>	<ul style="list-style-type: none"> • A regional SWOT analysis has been conducted, as has a SWOT analysis for the proposed transformation • Economic and workforce activities are oriented around identified and agreed upon strengths and weaknesses, threats and opportunities • The region has a current economic/workforce assessment (within the last three years) • That assessment is regularly used as the basis for joint initiatives among key stakeholders who are involved in the WIRED regional partnership • The WIRED proposal targets the gaps identified in the assessment and presents an implementation strategy to address them • The region has been focused on identifying and promoting its innovation assets and innovation is viewed within the region as an important economic driver • An integrated economic development strategy is in place for the geography covered in the WIRED proposal, unifying workforce and economic development systems and connecting to other public and private groups/entities • The region’s economic development strategy is balanced on growing existing businesses, cultivating entrepreneurs and attracting new businesses; it is not solely focused on the latter • The economic development strategy is aligned with the region’s economic/ workforce assessment and presents career pathways for moving workers into new positions 	

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	<ul style="list-style-type: none"> The WIRED proposal is aligned with the existing economic development strategy and will bring resources that will enable current efforts to be move from incremental to transformational 	
<p>Economic Development Strategies</p> <p>What strategies are presented to increase synergy between workforce, economic development and education systems?</p> <p>What types of jobs are being created -- high/low wage; high/low skill?</p>	<p>Key Activities/ Connections (Results driven/ proactive)</p> <ul style="list-style-type: none"> Projects Partnerships Links to WIA/ one stops Links to public and private education Career pathways Highly visible communications on activities Engagement of local elected officials in economic/workforce activities Working toward specific goals with measurable outcomes that are tracked and reported on across the region Creative approaches have been developed and are in place to increase synergy and alignment across workforce and economic development systems 	
<p>Outcomes</p> <p>What measurable outcomes have been identified and are they aligned with DOL/ETA goals?</p>	<ul style="list-style-type: none"> Measurable outcomes have been established, along with sources, frequency and methodology for measuring them Each outcome is supported by an implementation plan that has been thoroughly tasked out Tactics roll up to strategies that are designed to impact regional challenges around workforce and economic development Budgets and assignments have been developed and communicated 	
<p>Regional Models</p> <p>What models have been included to guide the proposed initiatives?</p>	<ul style="list-style-type: none"> Regional leadership is knowledgeable of relevant experiences in other regions and have already established contact with key leaders The regional strategy includes an element of capturing events in the region in order to document the approach and learnings for replicability Regional leadership understands and buys into the importance of sharing the WIRED work 	
<p>Learning/Education Integration</p> <p>What are the components of the region's lifelong learning strategy?</p> <p>Do colleges and universities have successful</p>	<p>Breadth and depth of regional programs</p> <ul style="list-style-type: none"> ALFI Principles of Effectiveness Proactive outreach Life & career planning Financing options 	

Discussion	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
<p>partnerships in place with targeted industry clusters, companies and trade associations?</p> <p>Has the region mapped its education capacity across the entire continuum of education to identify assets and gaps?</p>	<ul style="list-style-type: none"> • Assessment of learning outcomes • Diversity in teaching—learning processes • Student support systems • Use of technology to enhance learning • Effective strategic partnerships <p>Comprehensive, strategic programs and activities</p> <ul style="list-style-type: none"> • School-to-Career • Articulation agreements • Career pathways for incumbent workers • State policy focus on adult learners • Curriculum advisory groups • Internships and externships for students and faculty • Entrepreneurship and innovation curriculum • Links to industry and professional associations • Career fairs, mentoring 	

Regional Strategic Implementation and Institutionalization

Description	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
<p>Track Record</p> <p>Has the region dealt with the issues being addressed with WIRED in the past?</p>	<ul style="list-style-type: none"> • Prior activities in the region have been reviewed by the regional partnership the experiences from them have been woven into the transformation strategy • Assessment of performance and accountability • Projects/ reports • News articles • Public Forums 	
<p>Benchmarking</p> <p>What key baseline data has been identified to measure the current situation and track success?</p> <p>What data acquisition sources and methods – qualitative and quantitative – been identified?</p>	<ul style="list-style-type: none"> • List baseline data (see baseline TA document) • List data acquisition sources • Data is consistently mapped to geography covered in proposal, even if not usual geographic definitions or boundaries • Plans are in place for capturing regional perspectives at project outset and measuring change 	
<p>Workforce and economic development integration</p> <p>Do the workforce and economic development systems work closely and effectively together today?</p> <p>Have new structures been explored for integration of these systems to drive results?</p>	<ul style="list-style-type: none"> • Experience with region-wide planning • Buy-in for strategy and approach for regional implementation • Inclusiveness of regional partnership • Engagement levels of partners is high • Operational approach for the regional partnership is new and different from previous approaches (e.g., working groups) • Decision making process is clear, has been communicated and is understood and agreed to by all • Processes and people who will facilitate the implementation plan and transformation have been identified and are in place 	
<p>Implementation and maintenance of new programs, projects, policies and procedures</p> <p>How will the new proposed structure or process support long-term strategy development and continued innovation?</p> <p>How has the partnership addressed financial and systemic sustainability – i.e., funding for programs and projects behind WIRED grant?</p>	<ul style="list-style-type: none"> • Implementation plans are staged, with activities laid out in near, mid and long term phases • There is a long term view of innovation and how to sustain it regionally • Regional leaders have made long term commitments to WIRED; mechanisms for bringing new leaders into the process have been thought through • Infrastructure support has been identified to maintain programs • Budgets and methods for resource acquisition have been developed for WIRED and beyond 	

Description	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
Is there a mechanism to keep the leadership team and proposed initiative viable long-term?	<ul style="list-style-type: none"> • Additional funding sources, including matching, have been explored, targeted and secured 	
<p>Research, commercialization, and business development strategy</p> <p>Does the regional partnership demonstrate an understanding of their research, commercialization and business development capacity in the region?</p>	<ul style="list-style-type: none"> • The region is knowledgeable about commercialization and its historic role in the region • The region has the research and entrepreneurial assets necessary for successful commercialization • Key players in the commercialization process are a part of the WIRED project • Available data (SBIR, STTR, patents, commercial success, etc.) • Success stories 	

Regional Capacity for Talent, Innovation and Investment

Discussion	Transformative/Innovative Factors	Notes/Comments Including Potential Technical Assistance and Resources
<p>Overall business/ innovation environment</p> <p>How satisfied are businesses with their overall innovation environment?</p> <p>What regional resources are available to support new and emerging businesses?</p> <p>Can businesses access the necessary talent to grow?</p>	<ul style="list-style-type: none"> • Region has measured business satisfaction with overall innovation and entrepreneurial environment. • Region understands businesses skill needs and gaps • Region has assessed perceived quality of universities, colleges and learning institutions by local business leaders • Region has assessed the strength of partnerships/ linkages between business and these educational/ learning organizations 	
<p>Regulatory environment</p> <p>Are there current regulatory or statutory barriers that could impact success?</p>	<ul style="list-style-type: none"> • Region has asked businesses to identify key regulatory and statutory impediment to business success 	
<p>Entrepreneurial environment</p> <p>How entrepreneurial is the region's business culture?</p> <p>Are entrepreneurs involved in the WIRED regional partnership?</p> <p>Does the community of service providers (legal, accounting, finance and banking) have experience working with entrepreneurs?</p>	<ul style="list-style-type: none"> • Region has collected metrics to document entrepreneurial activity such as number of start ups, number of fast growing companies (gazelles), number of spin-outs, etc. • Region has surveyed their leadership to determine whether they embrace risk, diversity of thoughts and culture. • Region has mapped/ identified their entrepreneurs and entrepreneurial service provider. • Regional organizations are in place to support entrepreneurs. 	

Federal, State and Local Resource Leverage

Issue	Transformative/Innovative Factors	Notes/ Comments Including Potential Technical Assistance and Resources
<p>How will the region use and leverage existing federal, state and local resources with the new approach?</p> <p>Are there federal, state and local policies that need to be in place or changed to achieve the integration of existing resources and the WIRED resources?</p> <p>Is there a process to realign or access resources under existing federal, state and local programs for the new regional approach?</p>	<ul style="list-style-type: none"> • Region has specific plans how existing federal, state and local resources in the region will be used to support and accelerate the WIRED strategic approach. • Ideally: the proposal will identify lead individuals and/or organizations tasked with coordination 	

Appendix

The following additional questions are provided to supplement the Matrix for reference and to help guide discussions with WIRED regions around specific areas of interest.

Issue	Discussion
Regional partnership representation	<ul style="list-style-type: none"> • Does the leadership team represent multiple geographic communities from within the region? • Is there consensus among the partnership about the regional definition or is this a new definition created for the proposal?
Leadership attributes of regional partnership	<ul style="list-style-type: none"> • What is the tolerance for risk, visibility and exposure of regional leaders? • How committed is the partnership to sustaining the transformation after the DOL-ETA money is gone? •
Experience and time in collaboration	<ul style="list-style-type: none"> • Is this a newly formed partnership or relationships that have been in place? • How much experience has the partnership had working as a team? • If the partnership builds upon an existing entity, how will the expansion/ evolution be accomplished? • What has been the role of participants in dealing with prior efforts to revitalize or transform the region?
Staffing structure and capacity to manage WIRED day-to-day activities	<ul style="list-style-type: none"> • Is the staff at the right level to be able to deliver on the project, including both authority and accountability?
Well defined roles/ goals for participating organizations	<ul style="list-style-type: none"> • Given the strategy, have any skills or capacity been identified as missing and is there a plan to build the capacity? • Does the funding structure result in accountability for all the organizations in the partnership?
Social capital network maps	<ul style="list-style-type: none"> • Does the region understand and appreciate the role and value of its networks in fostering collaboration?
Regional economic analysis	<ul style="list-style-type: none"> • Has an assessment been done on growing, declining and emerging industries? • How thorough is the analysis of the gap between needed workforce skills and the levels of education and skills in the current workforce?
Economic/workforce strategy integration	<ul style="list-style-type: none"> • What is the role of the public workforce system (i.e., the Local Workforce Investment Boards)? • Are strategies linked to workforce and economic development challenges?
Responsiveness of higher education to adult learners	<ul style="list-style-type: none"> • Does the region have an adult education strategy in place? • Are colleges and universities responsive to adult workers in both non-credit training and for-credit programs?
Learning / education integration	<ul style="list-style-type: none"> • Do the higher education and workforce policies respond to the needs of adult learners? • Do the region's high school, vocational schools and universities involve employers in the design and delivery of education of adults? • Are workforce and higher education policies aligned to achieve WIRED outcomes/ goals?
Leveraging existing resources	<ul style="list-style-type: none"> • Are there state or local financing mechanisms in place to support training and education needed for the workforce? • Has the regional partnership considered how to drive needed policy changes?