CUYAHOGA COUNTY
WORKFORCE FUNDERS GROUP

CASE STUDY

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Workforce Connect

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DEACONESS FOUNDATION

Introduction

Since late 2015, a small, diverse group of funders have committed themselves to transforming the outcomes of the workforce system in Cuyahoga County. That system is vast – encompassing public and non-profit education and training programs, the public, private, and philanthropic funders of such programs, company-based workforce programs, business-led nonprofits, public and non-profit agencies that provide a variety of human services and many other players. That system is fragmented and poorly understood. The members of the group – which eventually adopted the name Cuyahoga County Workforce Funders Group or WFG -- have distinct priorities and motivations but share a frustration with the results of the system. They also share a common hope: Together they can catalyze changes that result in improved outcomes for both companies and residents.

Meaningful progress has been made toward transforming the workforce system, but much work remains. This case study is intended to support the work ahead by memorializing key lessons learned to date. These lessons are also applicable to other collective efforts to transform complex civic systems.

Social scientists that study civic collaborations say they go through a four-phase cycle and many collaborations journey through the cycle multiple times as the partners work to achieve enduring, positive community change. Not every collaboration stays together through an entire cycle. Those collaborations that go through the full cycle generally do so in three to five years.

Collaborations don't emerge from thin air, nor did the WFG. The first section of this case study, **Convergence**, describes the factors and forces that contributed to and constrained the formation and early efforts of the WFG.

The story of the WFG is the story of multiple, interconnected collaborations. First, is the collaboration of the group itself. Early on, the WFG decided one of its objectives was to catalyze three other collaborations – known as sector partnerships facilitated by intermediaries. The case study captures the lessons to date from the WFG as a collaboration, as well as the lessons from the sector partnerships.

This case study is focused on key lessons that propelled it through the cycle, not a chronological retelling of all the decisions and interactions that influenced that journey. The most important lesson relates to the exercise of specific types of leadership to strengthen and sustain the group and its work. The **Leadership** section describes and provides examples of four different types of leadership that participants in the WFG and the sector partnerships described as essential. Other examples of leadership are provided throughout the case study to reinforce the overwhelming importance of this lesson.

The next three sections capture key lessons from each of the first three phases of the collaboration cycle: **Explore**, **Develop,** and **Implement**.

Neither the WFG nor any of the collaborations it has spurred have entered the fourth collaboration phase, "regenerate." In this phase partners in a collaboration reflect and respond to changes in the system and make the critical decision on whether to re-enter the "explore" phase. Undoubtedly, the WFG will reach the fourth phase. The lessons from this case study are intended to inform the group's decisions regarding whether and how to continue their work together.

Convergence

Key Lesson:

Collaborations do not happen within a vacuum; they are shaped by context. Conditions were favorable for the WFG because of significant changes within the workforce system, including changes at key organizations.

A convergence of factors and forces contributed to the emergence of the Cuyahoga County Workforce Funders Group in late 2015. A tightening job market made talent the top pain point for many employers. Unemployment, which had been over 8% in 2011 fell to 5% by the end of 2014 when Armond Budish was elected to be the second county executive in Cuyahoga's history.

On the campaign trail, Budish heard two frequent complaints:

- Companies were struggling to find the workers with the skills needed to enable them to grow.
- Many residents either couldn't find work or were stuck in low-wage jobs.

One of the first tasks he gave his new chief of staff, Sharon Sobol Jordan, was to sort through and develop a plan to address that paradox. Like all counties, Cuyahoga's government was the conduit for delivering federal and state human services programs to residents. Under its still relatively new charter, Cuyahoga government was given a second mission, economic development. Budish's vision was to integrate and align the county's human services and economic development missions. One of the reasons he tapped Jordan to be his chief of staff was her familiarity with both human services and workforce training programs.

After taking office in 2015, Budish met with more than 100 businesses in 100 days to better understand their needs and the message he heard on the campaign trail was amplified. A few years earlier, the number one need had been access to capital. Now, with unemployment falling under 5% in late 2015, the business community said they were desperate for talent.

Budish wasn't the only one hearing that message or focused on talent. Several other key players were pushing forward workforce and talent strategies in response to market forces, and foundations were increasingly focused on ways to support residents disconnected from employment access career pathways.

The **Greater Cleveland Partnership** (GCP) had begun to convene companies within specific in-demand industry sectors such as manufacturing, IT, and healthcare, to explore options for helping them improve their talent pipeline. This work laid the foundation for GCP adopting talent as a priority in its new strategic plan, Forward CLE. Shana Marbury, general counsel and senior vice president for Talent for GCP, assumed responsibility for the new Talent Imperative articulated by GCP members through Forward CLE, in addition to continuing the ongoing education and workforce development initiatives GCP had shepherded.

The **Fund for Our Economic Future** (the Fund), a regional collaboration of philanthropy and other funders, including Cuyahoga County and GCP, increasingly focused its grantmaking and leadership on job preparation efforts. The Fund, which was formed in 2004, provided a regional table for funders to work together on economic strategies, and the Cuyahoga-based members of the Fund were increasingly looking at ways they could work together on efforts within the county. The Fund also had helped foster a culture of collaboration among a wide variety of economic development organizations.

The Fund catalyzed a systemic workforce effort in Summit County in 2014. A pilot program in Cuyahoga County, called WorkAdvance, demonstrated the value of and investment required to implement more holistic, sustained approach to career advancement and economic mobility. The detailed assessment of that pilot had generated a host of lessons that were being explored by a separate group of Cuyahoga-focused funders. That learning group, which included philanthropy, government and business, was chaired by Deborah Vesy, chief executive of the **Deaconess Foundation**. Deaconess had recently shifted its mission to an exclusive focus on workforce, as it worked to help people in need build careers that sustain them and their families. The foundation believes that career pathways to family-sustaining wages are the community's best solution to poverty.

The **United Way of Greater Cleveland** increasingly focused its efforts on helping the community identify and address the root causes of poverty, not limit itself to funding programs that treated the symptoms of that poverty. Developing a systemic approach to workforce within the county was aligned with the United Way's priorities.

The largest philanthropic foundation in the county, the **Cleveland Foundation (TCF)** was developing a new economic strategy informed by both encouraging and discouraging economic trends. The post-Great Recession economic recovery was fueling growth in Northeast Ohio, but too many residents in too many Cleveland neighborhoods were not benefiting from that growth. Indeed, many Cleveland residents were falling farther behind economically because of a gap between their skills and the demands of employers. Learning visits to Europe had showed TCF officials that change would require greater engagement by employers. TCF had awarded grants to a handful of workforce initiatives that relied on heavy employer engagement in manufacturing, life sciences and IT. And the foundation was eager to connect workforce development efforts with neighborhood-based efforts to improve the economic prospects of residents

The Fund, through its engagement with other regions, shared TCF's interest in catalyzing greater employer engagement in workforce efforts and had made it a priority to develop "sector partnerships" that bring together multiple employers within an industry to collaborate with colleges, schools, labor, workforce agencies, community organizations, and other community stakeholders to align training with the skills needed for that industry to grow and compete. Such partnerships had proven themselves to be highly effective in other markets, according to Bethia Burke, President of the Fund. Fund members included GCP, Cuyahoga County, Deaconess Foundation and **George Gund Foundation**, a private foundation with a long history of grantmaking on education and workforce efforts.

Sector partnerships were also favored by the public workforce agency serving the **City of Cleveland** and the county, **Cleveland-Cuyahoga Workforce Development Board** (WDB). Grace Kilbane, its Executive Director, was familiar with sector partnerships from her past work with the Department of Labor and WDB had secured a federal grant to implement such partnerships in manufacturing, IT, and health care. The size and time limitations of the grant limited the scope of the effort, but it contributed to a growing understanding of the potential benefits of sector partnerships. That pilot also reflected an increased emphasis of the WDB on serving targeted industries. New federal law, Workforce Innovation Opportunity Act, signed in July 2014 was the first substantive change in federal workforce policy in 15 years and was designed to give local entities, like the WDB, greater freedom to meet the needs of both employers and job seekers. The WDB had improved its performance since the separate city and county agencies had merged in the previous decade. The WDB was among the state's highest performing agency in terms of placements and partnerships with employers. However, there was consensus among the government officials that the placements by the WDB were insufficient to address the dueling complaints being heard by Budish and others:

- Too many companies couldn't find the talent they needed.
- Too many residents weren't prepared for or didn't have access to good jobs.

The short-hand term that many used to describe this paradox was the "supply-demand gap." A report commissioned by TCF and released in the fall of 2014 showed too few Cuyahoga residents had the post-secondary training and education that employers were increasingly demanding. The report provided supply-demand gap data for specific types of jobs, including in information technology, manufacturing and health care.

While momentum was clearly building for more interconnected workforce efforts, optimism was tempered by a track record of false starts and failures. Gund Foundation had made a significant investment in a workforce effort in the late 1990s that failed to produce meaningful change because of a lack of commitment and resources by the county and the WDB. A more recent large, collective workforce effort catalyzed by the Fund never got traction, in part because of the sheer number of participants with diverse interests.

Sobol-Jordan was aware of the skepticism and past attempts at improving workforce outcomes. She focused her initial efforts on better understanding the current state of the system. She met with dozens of individuals to better understand issues like the supply-demand gap. She developed a "funnel" graphic to illustrate what she was learning about when job seekers entered the workforce system, when they dropped out, and how they got through the funnel to access a job. The graphic illustrated how some job seekers – especially veterans – were in high demand and others with limited work histories were disconnected from the talent system. She also heard how there was minimal focus on helping job seekers to advance in their career to the point where they had sufficient income to support a family. Jordan developed a "stair step" graphic based on what she heard. The graphic illustrated how individuals didn't begin to earn a family supporting wage until they had made four steps up the staircase, either via promotion or by changing employers. Few programs were designed to help the individual get four steps up the staircase. Helping workers up that staircase would also serve businesses by helping them train their employees for higher value jobs.

Sobol-Jordan would update her graphics as she accumulated more insight into the workforce system with every meeting and she'd often go back to those she had met with earlier to test emerging ideas.

Sobol-Jordan saw the need to both alter how county government operated within the workforce system and a need to change the broader workforce system that extended far beyond the control of the county. Budish's first budget reflected his programmatic commitment to aligning the economic development and human services missions of the county. Budish allocated $6 million from the county's operating levy to create funding for such a program, later called SkillUp, and $10 million to early childhood development.

The budget allocation demonstrated the high priority the new administration placed on workforce and Sobol-Jordan hoped it would persuade other players that the county was committed to making changes that would improve the workforce system. Jordan said her meetings with a variety of players in the workforce system reinforced her perspective that the best way to drive meaningful change in the workforce system was to start with the funders. Jordan believed the program offerings, the outcomes generated, and the data tracked in the workforce system all reflected the requirements and expectations of the entities that provided funding for those programs. There were a lot of different funders. Funding came from businesses. It came from many foundations and the United Way. Most of the funding flowed from the federal and state agencies, and the county acted as the local conduit for a lot of those dollars.

If system change were possible, Sobol-Jordan believed it would be driven by funders.

Leadership

Key Lesson:

Collaborations require distinct types of leadership. Leadership from the group's first chair gave it a clear purpose and unrelenting leadership from its second chair pushed the group to be able to act and implement. Specific types of leadership exercised by multiple members strengthened and sustained the group.

The WFG is a collective effort. Its progress reflects each member's commitment to shared visions and mission. However, each of those members attributes its progress to leadership exercised by individuals that helped build, reinforce, and sustain their respective commitment to the work. The members identified four different types of leadership:

Galvanizing leadership helped bring the members to the group in the first place and held them there when the going got tough. The group was convened in the fall of 2015 by County Executive Armond Budish. The new county executive put his personal credibility behind an ambitious workforce reform effort and that attracted other leaders from business, philanthropy, and government to the table. Later in the group's journey, members were inspired by the sheer will and determination of its chair, Deborah Vesy, president and CEO of Deaconess Foundation. Members said they would have given up at different points in the process if not for Vesy's ability to hold them at the table by reminding them of the importance of their mission. Natoya Walker-Minor, chief of public affairs for the City of Cleveland, said the individual members of the WFG worked to build personal relationships with each other. Such personal relationships are stronger than organizational relationships and have kept members at the table for five years.

Process leadership helped a diverse group of independent players to make decisions together. Sharon Sobol Jordan, the first chief of staff for County Executive Budish, engaged in a series of one-to-one meetings and then focused the group's initial meetings on securing a shared vision of what the group wanted from the workforce system that served as a "north star" that continues to shape the group's actions. Vesy's skill in designing protocols and procedures that helped the members sort through diverse perspectives and reach decisions was described often as essential to the group's progress. As one advisor to the group observed, Vesy put a lot of energy into figuring out how to get the group to say "yes" on a variety of key issues. Collaborations, by their very nature, are messy. One member of the group was so impressed by the processes and procedures put into place by Vesy that she referred to the work as "tidy."

Collaborative leadership occurred when members made changes to their own beliefs or behaviors in ways that inspired others to do the same. This type of leadership is vital within a collaboration as the members of the group don't have the power to order others to change their behavior, rather they lead by example. Vesy's willingness to devote her time, the time of foundation staff, and foundation financial resources to the work of the WFG was one example of such leadership. The WDB's willingness to allocate its financial resources to enhance the manufacturing sector partnership was cited by several members as an example of such leadership, as was the Fund's willingness to take on responsibility for acting as the fiscal agent of the group.

System leadership occurred when the members of the WFG used their collective influence to influence others in the workforce system. Since the diverse members of the WFG united around a shared vision for the workforce system, individual entities can then align their own programs to achieve that vision. Frank Brickner, interim executive director and CEO of the WDB, said the WDB shifted its programs and resources to align with the broader system goals established by the WFG. Those broader system goals have much more credibility because they are a shared goal of several critical players rather than the goals of just one organization, he said.

The development of the Workforce Connect identity for the combined work of the group and the emerging sector partnerships was essential to exercising this type of leadership. The Workforce Connect identity allowed the work to be presented as a collective movement, not an isolated project or initiative. The WFG is made up of powerful institutions, organizations, and individuals. Its ability to speak as one requires each member of the group to sublimate their own identity to speak collectively on behalf of the community. One member of the group observed how unusual it is for major funding announcements to be made only as a group, and not touted separately by each member of the group that contributed funds. Other members of the group said the ability of the WFG to effectively advocate on behalf of the overall workforce system will be critical to the group's success in transforming workforce outcomes in Cuyahoga County.

While leadership was exercised by many individuals, past and current members were unanimous in their view that Vesy exercised the most leadership to sustain the group. Representatives of the manufacturing sector partnership said Vesy took the time to build trust and created a healthy funder-grantee partnership that enables them to take risks and aspire for greater change than would happen in more traditional grantee-funder relationships. Several past and current members of the group openly questioned how the leadership gap created by Vesy's retirement on Sept. 30, 2020, will be filled. Others were more optimistic, observing that Vesy's determined effort to build a culture where each member's voice is heard, difficult conversations are held, and tough decisions are made collectively was successful and will be sustained after her retirement.

Explore

Key Lessons:

- **Funder commitment is required to catalyze systemic change.**
- **Early agreement on desired change provides a foundation and clarifies the shared purpose of diverse funders.**
- **Strategy development demands narrowing of focus, expertise, broad engagement and broad buy-in.**

Collaborations that aspire to disrupt existing systems emerge when leaders begin asking new questions. Questions that funders were hearing Sobol-Jordan ask even before a group meeting was convened included:

- How do we do a better job of helping businesses fill their open jobs, while also serving our residents in need of assistance?
- Who else, besides the county, is working on workforce development?
- How might the county more effectively engage with others?

Jordan met regularly with funders as she tried to deepen her own understanding of the workforce system and during those meetings, she expressed her desire that the funders would see themselves as co-owners of the system and co-creators of a new effort to transform that system. She said her goal for the workforce system wasn't to create more processes or programs, but to reduce the friction within the system that was causing the supply-demand gap.

The reception from the funders was generally positive, but she received a lot of push back from other interested parties that they too should be among those exploring the answers to her questions. She recalls telling an advocate for job seekers that individual job seekers didn't need to change their behavior nearly as much as the funders. The funders were paying for and perpetuating a system that wasn't working. Her experience persuaded her that achieving lasting positive change at scale was only possible if the funders changed their behaviors. She felt that including educators, training providers and others in the room would make the discussion more complicated, as they would undoubtedly position themselves for more support rather than focus on the need for change.

In late fall of 2015, Sobol-Jordan felt she had done enough one-to-ones for County Executive Armond Budish to invite about 15 people to an initial meeting of what was to become the Workforce Funders Group. The initial invitees were the chief executives of Gund Foundation, United Way and TCF, the president of the Fund, Walker-Minor from the city of Cleveland, the board chair of the WDB, the CEOs of two business-led organizations, Greater Cleveland Partnership and Team NEO, and a few other business leaders who Sobol-Jordan believed had influence with other players in the room and the overall workforce system.

Sobol-Jordan said her goal was to design working sessions where leaders would feel safe to learn and discover what they might do together to catalyze change. The invitees were mostly the top executives or board chairs of organizations. She knew that eventually these leaders would delegate to others within their organizations, but she wanted to secure commitment from the highest level of each organization.

She knew that eventually service providers and other stakeholders would need to be engaged in the effort, but she wanted the members of the group to explore the issues first as funders.

That perspective caused her to invite only the board chair and not the executive director of the WDB. Sobol-Jordan felt the chair, Quentin McCorvey, who was an executive at KeyCorp at the time, brought both the perspective of business and the perspective of a funder of programs to the table. She knew not everyone would agree with the decision, but she felt that excluding the executive director would help keep the focus on the needs of companies and job seekers, not the needs of individual agencies and their programs.

One addition to the group was made after the first meeting. At the urging of Brad Whitehead, president of the Fund for Our Economic Future, Vesy from Deaconess Foundation was included when the group reconvened early in 2016.

Participants were eager to respond to Budish's invitation, in part, because they had never been at such a table before. Past efforts in workforce had been either too narrow or too broad. The opportunity for a funder-focused discussion that had private, public, and philanthropic funders at the table intrigued the participants. Walker-Minor from the city of Cleveland said having philanthropy in the room early was important because philanthropic dollars, in general, are more flexible than public dollars. Driving system change would require flexible funding. To some members of the group, just having the opportunity to share and learn with other funders made the early meetings worth their while. They all saw the potential for making meaningful change to the system by aligning their respective efforts.

By having different types of funders together at the table, one member said there was the potential to emulate a successful model of "sustained, compounded investment" used to transform some of Cleveland's neighborhoods. Ohio City, for example, was transformed over decades of layered investments from diverse sources on everything from infrastructure to programming. New investments built off previous investments and their impact was compounded. The creation of the WFG provided a vehicle for the funders to explore together the many layers of funding that shape the workforce system and how they individually and collectively might alter that funding in ways that could transform the system.

Sobol-Jordan's first objective for the group was to build agreement among the participants on the current state of the workforce system and what a successful system, referred to as a "coordinated workforce system", looks like.

In July 2016, the group approved a document titled "Workforce Transformation for Cuyahoga County" that said a coordinated, well-functioning workforce system:

- Supports business growth and profitability through a workforce pipeline that delivers a sufficient and steady supply of qualified candidates at all skill levels to keep jobs filled;
- Helps residents with employment barriers (that keep them outside the pipeline) become skilled workers pursuing career and wage pathways (inside the pipeline); and,
- Builds alignment among public, private and philanthropic funders to invest our separate workforce dollars in ways that move forward shared goals and priorities, and measure success by shared outcomes and impact.

And it developed three “from-to statements” that described the shifts that were required to develop such a system.

Move the system **from** this	**To** this
Separate programmatic efforts to meet current company demand	Shared systems-level focus on **eliminating demand-supply gap for in-demand jobs** now and in the future in a sustainable way
Separate programmatic efforts to meet current needs of job seekers for entry level jobs	Shared systems-level focus on **meeting current needs of job seekers** for an entry level job and a career and wage pathway
Separate programmatic funding goals and priorities, and duplicative, disconnected planning conversations	Shared systems-level goals and priorities for **driving better coordination** and guide all local and regional workforce planning and funding decisions

The three desired outcomes of a coordinated, well-functioning workforce system and the accompanying “from-to statements” continue to guide the work of the WFG and while the wording has changed somewhat, they provide the foundation of the group’s strategic plan adopted in the spring of 2020.

The shared purpose of the group was inclusive enough to accommodate the distinct priorities of the diverse funders. For example, GCP’s priority was to assure that whatever programs emerged from the group’s work considered the business voice and addressed companies’ talent needs. In contrast, the mission of the Deaconess Foundation is to help people in need build careers that sustain them and their families. From its earliest meetings through to today, the group has worked to balance the priorities of each individual member with its shared purpose.

With an agreed upon focus, the group formed an “Action Planning Task Force” that included more staff from the organizations at the table. The task force broke up into teams to explore how to begin to move from the undesired “from” to the desired “to.” Sobol-Jordan saw these teams as an essential part of the need to shift ownership of the effort from the county to the members of the group. She knew that since the county executive convened the effort it would be viewed both by outsiders and members of the group as a “county government effort,” but could only succeed if it was viewed as a shared effort.

Indeed, some early members of the group saw the initial set of meetings as county government centric. While no one stepped away from the table, expectations among several members weren’t high. Distinct priorities and turf issues among the members were evident. One member said the early meetings caused them to wonder: “Could the group stay together long enough and dig deep enough to develop an implementable plan?”

The deep digging began with teams exploring the value of sector-based partnerships, how the multiplicity of players within the workforce system might embrace shared metrics and what would it take to foster greater alignment of the wide variety of educational institutions, training programs, and human services agencies that played key roles in supporting job seekers.

There was no staff capacity to support the members, so the members had to do the digging in addition to their day jobs. Some members of the group were able to invest more time than others. Those that invested a significant amount of time said the experience helped build trust. Most members of the group were at least familiar with each other, but many hadn't worked with each other. Marbury from GCP said that it was while digging into issues related to sector partnerships that she began to see the level of commitment and energy that Vesy and others were willing to bring to the work. She saw trust growing within the group and her expectations for what might be possible grew, as well.

Among the new participants in the group was Shilpa Kedar, who was the program director for economic and workforce development at The Cleveland Foundation. Kedar had led the development of the foundation's new economic strategy and she was hopeful that the WFG could advance that strategy. Kedar felt the group had great potential because she had a high level of trust with several of her fellow diggers, including Vesy and Bethia Burke from the Fund. Her work on other collaborations had reinforced her belief that the attitude and commitment of those engaged was critical to both the development of good strategies and the ability to execute on those strategies. She felt the members of the group had the attitude and commitment needed to break the code on how to improve workforce outcomes.

The group's work together benefited from the growing trust among its members but was hindered by the size of the workforce system, lack of capacity, and uncertainty on what specifically the group could accomplish. In September 2016, the WFG agreed with the action planning task force's recommendation that the work be focused on building sector partnerships and shared metrics.

The group formed a new task force charged with developing recommendations for establishing new or strengthening existing sector partnerships and intermediaries in specific growing industry sectors and occupations. The Sector Partnerships and Intermediaries Task Force included service providers and business interests, as well as several members of the group. Engaging more members of the workforce system was important to several members of the group. They knew that many key players within the workforce system felt shut out of the WFG process, and ultimately those players would need to support whatever changes emerged. Vesy said she had learned from her past work that people support what they help create. While she valued the funders having their own table to sort through issues, she felt it was critical to create a table where more players could come together and co-create solutions.

Deaconess Foundation believed there were five key types of stakeholders within the workforce system:

- Government
- Philanthropy
- Employer-serving organizations
- Job seeker-serving organizations
- Education/Training organizations

All five of those stakeholders were represented on the sector partnerships task force.

The task force decided it needed outside help to assess the community's capacity to launch sector-based partnerships and in June 2017 the WFG approved hiring two consultants to conduct research, facilitate the task force, and assist the task force in making recommendations to the WFG.

Creating the task force and retaining the consultants was an important milestone in the evolution of the WFG. The Fund assumed fiduciary responsibility for the contract with two consultants, Loh-Sze Leung of Leung Consulting LLC and Alan Brickman of Brickman Nonprofit Solutions, retained on behalf of WFG. Leung and Brickman provided capacity to help move the sector partnership work forward, but members of the group were also heavily involved in the task force, including five members acting as co-chairs. Leung brought deep experience helping other communities develop and implement sector partnerships based on best practices.

The emphasis on sector partnerships and the work of the task force became the focal point of the WFG member's energy and time. The shared metrics effort wasn't sustained. The group recognized it couldn't do everything that needed to be done to create a "coordinated workforce system" at once and they believed that developing sector partnerships was both achievable and would provide a foundation from which they could pursue the next layers of work, including shared metrics.

In January 2018, the task force issued a 45-page report that included specific recommendations to the WFG regarding what sectors were worthy of a sector partnership – manufacturing, health, and information technology – and how the WFG should fund, support, coordinate, and hold accountable the partnerships. The report provided a road map for how the WFG could work with others in the community to develop effective sector partnerships.

Develop

Key Lessons:

- **Collaboratives constantly evolve in response to several factors, including capacity constraints, progress of strategies, partner commitment, and leadership.**
- **Trust-based processes build commitment and accelerate momentum.**
- **Transformation requires resources and strong partners.**

Before the WFG could begin to develop the sector partnerships, it had to deal with a change that would affect the development of the WFG itself. Sobol-Jordan announced in February 2018 that she was leaving the county to become president of Unify, a nonprofit tech innovation lab with the mission of powering inclusive prosperity. The group needed a new chair and county officials who worked with Sobol-Jordan on the effort were clear on who they wanted the chair to be: Deborah Vesy of Deaconess Foundation.

Ted Carter, chief economic development and business officer, said asking Vesy to serve as chair was natural because the mission of Deaconess Foundation was so closely aligned with the goals of the WFG. David Feinerman, Head of Workforce Innovation for the county, said Vesy had demonstrated that she was both willing and able to assume the heavy workload of propelling the group through the process of developing and implementing the sector partnerships. Although Sobol-Jordan wasn't involved in the decision to name Vesy chair, her selection helped advance one of her goals, that the work of the WFG would be seen as a shared effort, not an initiative of county government.

For her part, Vesy valued the trust the county and other members of the group showed in her and was willing to take on the task for the same reason that Carter felt she was the natural fit: the WFG and Deaconess Foundation shared a goal of transforming the workforce system.

By early 2018 Vesy and other members of the group felt a growing sense of urgency to move the development work ahead as fast as possible. More than two years of meetings, research, and engagement needed to be translated into actions and ultimately, results. Vesy put into place several changes that she hoped would both accelerate the pace and strengthen the group's ability to work together over the long haul. The group committed to monthly meetings. In-person attendance was required (until the corona virus pandemic forced the meetings to be held online). Lunch was provided to encourage attendance. A governance committee was formed to work through issues related to protocols and procedures of the group. A consultant, Caroline Taich, was retained to facilitate the meetings and coordinate the development of the sector partnerships.

In addition to dedicated resources to support the group, Vesy persuaded the group to retain dedicated communications support to increase transparency and awareness of the group's emerging work. Vesy said the decision to allocate resources to communications was more challenging than she expected, but she felt it was critical for the group to not only explain what it was doing, but to also have a brand identify for the collective effort of building sector-based strategies with the support of an intermediary.

Chas Withers, president of the Cleveland-based communications firm Dix & Eaton, had sat in on several WFG meetings at the invitation of Sobol-Jordan and had shared informal advice on both the value and challenge of communicating the group's work. While each of the players at the table had their own communications capacity, Vesy felt the group needed to communicate for itself and on behalf of the broader work. Dix & Eaton was hired to develop a brand identity, Workforce Connect, including a logo and color scheme. As noted in the leadership section, the ability to communicate as a collective effort helped build support for the group's goals.

One of the benefits of more structured set of processes and procedures for the group was that new participants in the group could be brought up to speed more quickly. The "churn" of members in the group was natural as people left their jobs and were replaced. Such changes could have drained the group of shared understanding and commitment. Instead, the new members were able to pick up where their predecessors left off and kept the work moving forward. For example, three different staff members from The Cleveland Foundation served on the group, in addition to its CEO. All the staff praised the effectiveness and efficiency of the process developed by Vesy and the willingness of other members to welcome them to the table.

The more structured approach also put a lot of power in Vesy's hands. She set the agenda for the meetings. She not only devoted more time than others, she had both Taich and foundation staff supporting her. As the work accelerated and expanded, different subgroups were formed to keep various elements moving forward. Some members of the group acknowledged that they couldn't be as engaged in the day-to-day work as they'd like. In contrast, Vesy immersed herself in all elements of the work and pushed work forward. Some members of the group said the process used wasn't always transparent, but Vesy tried to make it so that all major decisions were made collectively by the WFG. Members who weren't as engaged in the process said even if they didn't always know what decisions were being made, they didn't question Vesy's motives and valued the time and effort she committed to moving the group forward.

Vesy shared Sobol-Jordan's interest in building a learning environment where funders felt comfortable in having honest, challenging conversations about what wasn't working, what was possible, and what needed to change. While she endorsed the group's focus on sector partnerships, she insisted that the group stay focused on the bigger goal of sustained system change. If sector partnerships were seen as just another project in an ocean of workforce projects, the WFG would not transform the workforce system.

Vesy believed another change was required to increase the WFG's effectiveness. Grace Kilbane from the Workforce Development Board needed to join the group. Vesy never thought Kilbane should have been excluded and one of her first and more demanding challenges was to build trust with Kilbane and the WDB's relatively new board chair, Micki Tubbs, president and CEO of Fit Technologies. Tubbs didn't understand why Kilbane was excluded and welcomed Vesy's request that Kilbane join the group. Vesy believed Kilbane's experience and influence within the system would be vital to the development of the sector partnerships and the long-term work of the WFG. Vesy also took on an issue that she felt the WFG had neglected for too long: funding. The experience of other communities that implemented sector partnerships showed that they required multi-year, multi-million-dollar investments. The plan was to have an intermediary for each industry sector. That intermediary would be responsible for engaging companies to clarify and articulate their job and training demands, aligning the supply-side service providers to meet those demands and measuring progress toward those goals. The intermediary was also to make sure that the outcomes of the partnership addressed the diverse priorities of the individual members of the WFG, as well as its employer leadership. In short, being the intermediary of a sector partnership was not going to be easy. Vesy wasn't certain any organization would even respond to a request for proposals. She didn't want to even consider seeking proposals without first securing multi-year funding commitments from the members of the group. Due to the influence the county government has over the entire workforce system, she felt it was vital that the county make the largest financial commitment. She also knew from Bob Jaquay, associate director of Gund Foundation, that past systemic efforts in workforce failed because of a lack of county government involvement. To Jaquay, Vesy and many others in the group, the county needed to make a significant investment in the sector partnerships or the work of the WFG would come to a halt.

Matt Carroll, chief economic growth and opportunity officer for the county, said the Budish's Administration's commitment to the sector partnerships was always strong and the administration was confident that County Council would approve funding, as well. But Vesy was frustrated that no action backed up those assurances. Vesy and other foundation heads made it clear that they wouldn't ask their boards to award grants to the work until after the county acted. Carroll said he felt the foundations could have made their grants contingent on the county acting. From Carroll's perspective, the tension was an example of how community stakeholders are sometimes unfamiliar with the processes and constraints faced by public funders. He viewed the process of securing administration and council support as fairly routine, although it did take longer than expected for reasons not related to the WFG.

In contrast, Vesy didn't see the administration pushing the issue forward with council and felt compelled to directly advocate for the partnership with the key council member that would need to support the project, Jack Schron. Carroll and other members of the WFG said that Vesy's willingness to meet with Schron and advocate for the sector partnerships was another example of the persistent leadership she exercised to advance the work.

Schron is chair of County Council's Economic Development & Planning Committee. He is also president of Jergens Inc., a Cleveland manufacturer of tooling components, fasteners and host rings. He was intimately familiar with the talent supply-demand gap. In 2002, Jergens launched Tooling U, an online training program that has since been acquired by the Society of Manufacturing Engineers. He is also on the board of MAGNET and Manufacturing Works, two nonprofits that were candidates to be the intermediary for the manufacturing partnership. Schron would eventually actively participate in the employer leadership team of Workforce Connect Manufacturing. He had also been Budish's opponent in the 2014 county executive election.

Vesy and Schron both described their discussions as spirited and challenging. As the head of a foundation, Vesy was more accustomed to deciding which program should get funded than asking for funding from others. She felt the burden of advocating for public dollars one-to-one with an elected official who had the power to kill a project that she and her partners had worked on for years.

Schron said he valued the sweat equity that Vesy and the other members of the WFG had put into developing the sector partnership plan. He said negotiating with Vesy was comfortable because she was professional, reasonable, and prepared. His primary focus was assuring that taxpayers would see a return on their investment. He also wanted the implementation of each industry partnership staged over time so that lessons learned from the first partnership could be shared with the others. He wanted manufacturing to go first, health care to go second, and information technology to go last.

To secure the county's support, Vesy agreed and in September 2018 County Council unanimously approved up to $1 million over three years to support sector partnerships to address the talent-supply demand gap. Other members of the group then committed up to $1.5 million over three years to support the work.

Development of Intermediaries

The process of creating three separate intermediaries to develop and support sector partnerships in manufacturing, health and information technology is where the promise and potential of the WFG and its work became clearer to people outside the group.

That promise and potential was so powerful it caused one person to quit their job to join the effort.

Adam Snyder was president of a small manufacturing company and a board member of MAGNET, one of the organizations interested in serving as an intermediary for the manufacturing sector. He joined the MAGNET board because of a professional networking connection with its chief executive, Ethan Karp. He grew to appreciate MAGNET's role in supporting the growth of manufacturers and agreed to Karp's invitation to meet with the WFG to talk about the sector partnerships.

Snyder, who had experience working for large manufacturers as well as consulting for manufacturing companies, knew that developing and retaining talent was a competitive advantage and challenge for companies, and he also drew personal satisfaction from helping workers on the shop floor advance in their careers. However, he wasn't that familiar with the details of sector partnerships and he didn't know the members of the WFG.

During the meeting with the WFG members, Snyder became intrigued by what he was observing. He wondered what had united such a diverse group of high-powered organizations and institutions to sit at a table to learn more about manufacturing. He was struck by the level and depth of change such powerful players could catalyze if they acted collectively. He started to wonder what role he could play in that collective effort. Shortly thereafter, he agreed to leave the manufacturing company he was running to take on the responsibility of leading the manufacturing intermediary.

Snyder could see grand possibilities, what he couldn't see was the wide variety of challenges that the WFG was sorting through as they balanced their individual priorities and sought to overcome the many obstacles that had prevented such partnerships from emerging in Cuyahoga County.

One persistent source of tension within the WFG was how to both better serve companies and help residents disconnected from the workforce get on a pathway to prosperity. Since the focus was on building sector partnerships, much of the discussion centered around how to best serve companies and the need to be demand-driven. While the company focus was understandable, some members felt compelled to regularly raise the importance of designing the partnerships in ways that would advance racial equity and greater access for disconnected residents. One indication of the group's success in explicitly addressing and balancing that tension was that all of the philanthropic funders, including those who put the most emphasis on the need to better serve disconnected residents, committed funding to develop the sector-based partnership.

In September 2018, the WFG solicited letters of interest from entities that were interested in becoming the manufacturing intermediary. The letter said the intermediaries would perform the following functions:

- Engaging and convening employers and other partners and stakeholders
- Developing and sharing data and expertise
- Coordinating resource development and alignment
- Coordinating communication both internally and externally about the partnership
- Linking the partnership's activities to initiatives and resources of the broader workforce system, including the public system
- Managing projects, staff/contractors, and budgets related to the partnership's activities

The WFG recognized that the scope of the work was daunting, and it committed to working alongside the intermediary to support the development and the ultimate implementation of the sector partnership. Nonprofit leaders often hear from funders that they desire a partnership, but few have experienced one. The power dynamic between funder and grantee is very complicated and members of the group knew that developing a true partnership would require them to individually and collectively work differently with the intermediary.

Lissy Rand, vice president of grantmaking and strategy at Deaconess Foundation, said members committed a significant amount of time to create clear criteria and milestones for the intermediaries. The "hands on" approach of many WFG members shaped the development of the partnerships with the intermediaries. She expects that over time the WFG will become less directive and even more collaborative with the intermediaries.

When a leading candidate to be the intermediary, MAGNET, said it wanted to partner with GCP, a member of the WFG, it added another layer of complications to the WFG-intermediary relationship. MAGNET valued the opportunity to engage with GCP's large membership base to attract even more companies to the sector partnership. Having GCP assume the dual role of intermediary and member of the group that was charged with selecting the intermediary created an obvious conflict; a conflict that members of the group said could be addressed because of the protocols and procedures that had been put into place. The conflict was explicitly disclosed and addressed. All members of the group completed disclosure forms that identified potential organizational or individual conflicts. Marbury did not participate in the process of developing the manufacturing RFP process or selecting the intermediary. Members acknowledged that the dual roles of GCP creates some discomfort and can create some confusion. The group has managed through those issues, so much so that it was comfortable awarding the intermediary role for the information technology sector to RITE, a unit of GCP, in 2020.

One of the key issues for the WFG to sort through with MAGNET/GCP was how to measure success of the sector partnership. The WFG worked to balance the need for clear measures with the need to allow the measures to emerge as the companies that were to drive the partnership developed specific strategies.

Vesy led the group through the difficult work of balancing these and other tensions. One observer of the group described the group as having "candid, contentious, and well-intentioned dialogue." Vesy expertly navigated the diverse interests of the WFG, as well as the intermediaries, to keep the group moving forward. She would always bring the group back to its shared purpose to help propel them to make a decision. One member of the group said that while Vesy made her perspective clear, she did a good job of not using her influence to push people who were undecided to her side of the fence.

Ultimately, the WFG and the MAGNET/GCP intermediary agreed to a set of one-year metrics with future metrics to be established based on the specific efforts that emerged.

MAGNET President Karp said there are three keys to sustaining an effective sector partnership:

- Everyone needed to embrace a system approach because no single program or group of programs can overcome the systemic barriers and disconnects that hinder performance.
- Execution excellence is required because system alignment alone is insufficient to improve outcomes.
- Human and financial resources need to match the scale and scope of the effort.

The development of the intermediary was made possible because of the partnership built with the WFG. He valued that the funders had made a multi-year commitment. Past attempts at sector partnerships were limited to a year and were more transactional in nature.

Execution excellence needs to be embraced by everyone from the companies, to the training and education providers to the funders themselves. Karp said for the intermediary to operate at a high level, it would need to foster a true learning partnership with the WFG. Both sides needed to trust each other so they could challenge each other's assumptions and not shy away from difficult discussions regarding competing priorities.

Having sufficient resources to hire the right people and develop effective strategies is also essential. Karp said he was thrilled when Snyder expressed an interest in leading the intermediary because he knew the job would require someone with a combination of industry experience, a commitment to worker advancement, and the ability to navigate competing interests. Karp said that MAGNET used financial resources beyond those provided by the WFG to hire Snyder and Debbi Perkul, MAGNET's executive director of workforce partnerships. The WFG's multi-year commitment made investing additional MAGNET dollars easier, Karp said. Snyder's familiarity with the manufacturing sector and Perkul's deep experience working with a variety of training and social service partners make the two a strong team for developing the sector partnership.

In addition to MAGNET's "all in" attitude to resource and build the sector partnership, GCP also stretched its internal human and financial capacity to ensure that the sector partnership had the needed resources. Marbury, as well as one of her internal team members, as well as a GCP Equity & Inclusion team member all contribute a portion of their professional time, above and beyond the funding of the WFG, to the hands-on work and development of Workforce Connect Manufacuring. The combined GCP/MAGNET intermediary team has worked to leverage the value that both organizations bring to the table to catalyze the work.

One unknown was how manufacturing companies would respond to a call that they engage in co-creating a strategy. Snyder said that most manufacturers were like him, they had little experience with the supply-side providers. Some had mediocre experiences with them. Very few had fruitful experiences with them. Snyder relied on personal relationships to attract some of the first group of manufacturers to the table. MAGNET and GCP used their long-term relationships to secure the participation from companies, as well. When 14 companies were convened initially to begin the process of developing the demand-side strategy of the partnership, Snyder felt that his own personal credibility was on the line.

After years of preparing, members of the WFG were excited to see the manufacturing partnership begin to take shape. Walker-Minor from the city was particularly encouraged that Snyder had shifted from being an advocate for the effort to leading it. She and other members knew that success would depend in large measure on the level of commitment of manufacturers and she believed having an experienced manufacturing executive at the helm would increase the odds of success. Brickner was impressed by the mix of small, medium, and large companies that worked on developing the partnership's plan. He felt the participation of large enterprises, such as Lincoln Electric, would give the nascent partnership credibility within the sector and attract other companies. He was also impressed by deep level of engagement by the executives. The executives themselves designed the initial curriculum of soft and hard skills that they wanted implemented by the supply-side partners.

The development of the manufacturing partnership highlighted the different motivations of the players at the table. The promise of more financial support from funders, as well as the opportunity to better serve their respective constituents, helped attract the intermediaries and service providers to the partnership. The companies were focused on their bottom line.

The partnership needed a strong market-based case and a plan that could fulfill that case.

A key element of that case was that the sector partnership would achieve "execution excellence." In this context, that term referred to the need to prepare job seekers to excel in the manufacturing sector based on the perspective of employers. For the most part, that wasn't the standard of many existing training programs. Snyder said it was evident that the goal of many providers was to comply with whatever standards where set by the funder of the program. Those compliance standards didn't produce excellent employees. Setting a standard of excellence from the beginning would greatly influence the implementation of the partnership's strategy and programs.

As the manufacturing sector partnership was being developed, the WFG began to work on shaping the process to develop a partnership to serve the health care sector. Unfortunately, they couldn't just rerun the manufacturing playbook. The WFG had to adapt the lessons it learned from that sector to the completely different context of health care.

First, there were no existing organizations that were likely candidates to serve as the intermediary.

Second, the health care sector in Cuyahoga County is dominated by a few, hyper-competitive hospital systems. In contrast, the manufacturers that helped launch that effort may compete for talent, but they generally don't compete for customers.

Third, a systemic effort a decade earlier had collapsed without any results and the WFG wanted to both understand the causes of that failure and avoid repeating it.

Taich, the consultant retained to facilitate and coordinate the group's work, worked closely with Vesy and Marbury to help the group sort through the history and politics within the health care sector. Understanding the health care sector and what a successful sector partnership would look like required a deep dive. While not every member of the group dove in, one member that did said they learned more about the health sector then they ever imagined. A key decision was whether to focus only on the jobs within the acute care segment of the sector, which consists primarily of hospitals, or whether it would include non-acute care providers, such as nursing homes and assisted living centers. As the WFG met with hospital officials they heard a clear message. The only way the hospitals would participate was if the partnership focused exclusively on acute care. This experience showed some members of the WFG that the employers could be just as fragmented and siloed as every other element of the workforce system.

The WFG knew that a health care sector partnership that didn't include the community's largest hospitals wouldn't be credible, so they followed the hospitals' lead and focused on acute care jobs. The group also knew that without deep engagement by the largest hospital players, the sector partnership would not succeed. Key leaders from Cleveland Clinic, University Hospitals Health System, MetroHealth, and the Veterans Affairs Northeast Ohio Healthcare System were invited to work with the WFG to shape and participate in the process to identify the organization that would act as the intermediary. The hospitals reviewed and made recommendations of the three proposals received and participated in the selection of Cuyahoga Community College as the intermediary. The heavy engagement from the hospitals continues in the partnership. The hospitals were part of the process of hiring Susan Krejci to lead the sector partnership in July 2020.

The process of choosing an intermediary and committing financial resources to the health care partnership tested the group's ability to work together as members had diverse perspectives on how best to proceed. Members described emotionally charged debates over several elements, including whether the group's financial commitment could be reduced because of the willingness of other funders to support the partnership and whether the college's proposal merited a three-year commitment. Vesy saw it as a test of whether the WFG would keep its word and be a true partner with the intermediary. Taich, who facilitated the group, credited members with their willingness to be vulnerable and share their frustrations and concerns. The divergent perspectives may have caused other groups to splinter, but the trust and respect members had for each other allowed them to ultimately commit to a three-year investment in the health care partnership.

Schron's insistence that the development of each partnership be staged delayed advancing the information technology sector until 2019. Choosing the information technology intermediary had its own unique set of challenges. Courtney DeOreo, executive director of RITE, was part of the sector partnership task force that issued the recommendation to create intermediaries in 2018. For more than a decade RITE had united a diverse group of companies, from global manufacturing giant Eaton Corp. to small software companies, to address IT talent pipeline challenges. Initially formed as part of a short-lived state program, RITE had been sustained by DeOreo and a core group of business executives. Much of its effort focused on encouraging more young adults to consider an IT career. RITE had always positioned itself as the leader of a sector partnership, but its modest outcomes reflected its modest resources and capacity. In January 2019, RITE became a unit of GCP, in part so it could expand its network of companies and increase its capacity.

Since RITE was well known to the WFG, the group considered not seeking proposals from other entities to act as the IT sector intermediary. Some members felt it was important to understand what other options were available in the market, and they also wanted to minimize perceptions that GCP's presence on the WFG made the selection of RITE a given. The WFG solicited other proposals and considered one other proposal before selecting RITE in June 2020.

Both the IT and health industry sector partnerships were under development at the time of this case study. Because of the relatively early stage of their development, representatives from those efforts were not interviewed for this case study.

Development of the WFG

As members of the WFG dug deeper into the work of setting up the intermediaries, they also took on the task of developing a three-year strategic plan that was to update the group's mission, vision and values, goals and desired impact, strategies, membership and governance structure, and future operating model. The group again retained Leung and the process began in September 2019.

During the strategy discussions, important changes in how members viewed each other, and the group emerged. For example, Tubbs, the WDB board chair, joined the WFG with a perspective that her board was the most logical place for diverse interests to come together to sort through systemic change issues. As she spent more time with the WFG and as she went through the planning process, she increasingly valued the role the group played in bringing diverse funders together. During a discussion about the purpose and role of the WFG, Tubbs surprised many members of the WFG when she agreed that the WFG was indeed the "table of tables" – it was the place where systemic issues would be addressed and strategies were to be catalyzed. Several WFG members said that Tubbs' embrace of that role marked a point where the WFG became even more united.

The strategic plan adopted in March 2020 defined the group's mission and vision as follows:

Mission:

The Cuyahoga County Workforce Funders Group collaboratively drives opportunity for collective action, voice and investment in workforce strategies and systems change.

Vision:

We envision a coordinated workforce development ecosystem in Cuyahoga County that contributes to an equitable, growing and vibrant economy with thriving businesses, families, workers and communities and supports economic opportunity for all workers.

The group agreed on **four strategies** to advance that vision:

1. Collectively invest in sector partnerships and other existing or emergent strategies with a goal of advancing equitable labor market outcomes.
2. Develop and share common metrics and data that drive decisions, improve outcomes and close disparities in Cuyahoga County.
3. Identify and collectively invest in systems change efforts that improve workforce outcomes and increase equity.
4. Develop communications and narrative change strategies that elevate the importance of workforce development, highlight what works, and increase understanding of structural factors that drive disparities in our region.

However, the group struggled with issues related to membership, governance, and its operating model.

From the beginning Leung knew the members of the group were split on whether the focus should be narrowed, at least for now, to the sector partnership and those that wanted to explore what else the group might work on to achieve a "coordinated workforce system." Leung found members had little interest or energy to explore their theory of action and what levers they wanted or were willing to pull to strengthen the workforce system. The group also put time limits on how much of their meetings they would devote to these discussions. Invariably there was insufficient time to fully explore the issues, she said.

Much of the group's discussion of its future shifted from vision and strategy to structure and process. The issue of membership – what individuals and organizations should be included in the WFG – consumed much of the group's energy. Some felt that membership should be determined by what the group wanted to accomplish. They wanted more specific goals for the group before membership was addressed. Others felt the need for more perspectives at the table, especially those with personal experience with the workforce system. Vesy and others preferred keeping the group limited to funders of the system.

Ultimately, the group opted for the latter, but several members of the group said they consider that decision to be a short-term answer that needs to be revisited as the sector partnerships and other efforts evolve.

Carroll from Cuyahoga County echoed the views of several members when he said the WFG is an organic process that evolves, and it's not necessary to put overly specific policies and guidelines in place to confine that evolution. He said the group should consider opportunities to add members on a case-by-case basis, rather than establishing specific criteria. He is sensitive to too much emphasis on process and rulemaking, rather than tackling issues as they arise and trusting in the collective wisdom of the group.

Membership of the group has been a source of tension from before the group ever met. Also, the group has wrestled with the multiple roles played by its members. The overlapping roles of individual members became even more evident in May 2020 when the WDB elected MAGNET's Karp to be its chair. That move gave Karp a seat at the WFG table. Karp views his unusual position of both being the leader of an entity that receives WFG funding and a member of the WFG as an example of the unusual, trust-based partnerships that need to be built to transform a system as diverse as workforce. As a member of the WFG, he can provide other funders with deeper insight into the effort and can reinforce the value of the learning partnership. Other members acknowledge the unusual nature of Karp serving on the WFG, it is an issue they can work through, in part because they already went through it since GCP is both a member and an intermediary.

Rand from Deaconess said that the overlapping roles of WFG members is a persistent challenge that requires a lot of energy to address. She noted that while the group is primarily “funders,” many of the members are also “doers.” The WDB, for example, oversees the state-funded workforce programs delivered in the City of Cleveland and Cuyahoga County. Cuyahoga County operates its own workforce programs. GCP is an intermediary, a funder and an advocate for companies. While the group primarily has a “funders” mindset, Rand and others said it benefits from having some “doers” in the room. Still, the overlapping roles can cause tension and confusion. Rand said the members will need to invest time in sorting through the issues caused by their overlapping roles to effectively turn the WFG’s updated strategic plan into action.

As Vesy’s tenure at both Deaconess and as chair of the WFG came to an end in September 2020, the group had not finalized its leadership structure. The group did retain Janine Kaiser, an experienced workforce consultant, to support the implementation of the group’s strategic plan and facilitate its meetings. Kaiser, who also serves as director of job preparation for the Fund, had been working with the group through her role with the Fund.

Implement

Key Lessons:

- **Building a learning culture among funders, intermediaries and partners pays dividends.**
- **Each intermediary is distinct, which requires the WFG to be flexible and adapt.**
- **Collaborations evolve in ways that can make the next steps unclear.**

Each member of the WFG viewed the first two phases of the journey together as a necessary, but lengthy preamble to implementation. What mattered most was what the sector partnerships did. As MAGNET and GCP began converting its plans into actions, members of the WFG had a number of questions that they were anxious to learn the answers to:

- Would manufacturing companies embrace the concept of working with their peers to improve workforce outcomes?
- Would companies change their hiring practices and consider job seekers who had been disconnected from work?
- Would the supply-side players (training programs and social service agencies) alter their practices to meet the expectations of employers?
- Would all of the players – the WFG, the intermediary, the companies, supply-side entities – be able to learn and work together?
- Would the results justify continued financial support?

The WFG is still waiting for full answers to these and other questions but the early returns are encouraging.

Snyder from MAGNET recognized that one of the first hurdles to clear was whether the companies would embrace the WFG's emphasis on equity. He said that most people that run a manufacturing company are either engineers or accountants. That means they are very analytical and driven by numbers.

The intermediary team, which is made up of staff from MAGNET and GCP, presented several potential target populations for the initial pilot. The team shared data that highlighted the traditional process manufacturers were using (to recruit, prepare, and retain talent) wasn't working. There were too few job candidates to fill the jobs. Manufacturers had to consider different kinds of candidates and there was a huge pool of untapped workers, including African Americans, female workers, as well as returning felons.

Working with supply side partners to train job candidates who had been in the criminal justice system appealed for a few reasons. First, was their sheer number. Each year, over 3,000 people return to Cuyahoga County who had been in state prison alone. Some of the manufacturers at the table had successful experience employing returning citizens, finding them to be both valuable and loyal employees. The racial diversity of that population would advance the manufacturers' inclusion efforts.

Schron said the manufacturers designed the partnership so it would offer the broadest tent possible for job seekers, including returning felons and students and adults with special needs. The "big tent" approach is driven by both economic and social interests. Each open job within a manufacturing business accounts for about $250,000 in potential sales; if there are 3,000 manufacturing vacancies that is a large economic incentive to find better ways to fill those vacancies.

The case to give up the old and try something new was supported by the partnership's commitment to producing excellent candidates.

Schron said the manufacturers also view the sector-based partnership as part of a social compact that they have with the community and the neighborhoods. Snyder agreed, saying that as companies began to engage in the re-entry pilot, they increasingly wanted to lift up the social benefits of the program. Yes, the economics drove their initial interest, but Snyder was pleasantly surprised by how much value they placed on the community benefits aspect. That interest allowed the partnership staff to engage more deeply with manufacturers on issues related to racial equity.

Marbury said the May 2020 murder of George Floyd in Minneapolis and the attendant civil unrest in Cleveland and nationwide caused the intermediary team and the employers to begin to think even more deeply about how race and status play out in the work of the Workforce Connect sector partnership. A carefully facilitated conversation between the manufacturers and student participants in the sector partnership's re-entry pilot, ACCESS to Manufacturing, presented an opportune forum to create an open environment for a conversation between nine pilot students – all but two being African American males - and eight executives from six employers – including two African American males - with the underlying theme of racial equity. The conversation elicited transparent discussion from the manufacturers regarding their motivation to hire formerly incarcerated individuals, including how a past record impacts the hiring process, as well as authentic feedback from the students on their hopes for how a manufacturing career will make a difference in their lives and the lives of their families.

The outcomes of the employer-student conversation are a first step in creating space where employers and largely African American students can begin to wrestle together with aspects of racial equity and the impact on manufacturing and employment opportunity within. A direct outgrowth of that conversation was a desire from the manufacturers to be better equipped to identify systemic racism in their own organizations. As a result, in September 2020, a dozen manufacturing executives took part in a racial equity training program, a reflection of their growing interest in understanding and addressing racial issues in their business and their community. Snyder and Marbury agree that interest is an early indicator of what is to come.

Brickner said he was impressed when manufacturers committed to making returning citizens the focus of their first job training pilot, and even more impressed when they started hiring graduates of training programs coordinated by the WDB.

Snyder emphasized that the commitment to excellence has meant things have gone slower and some funding opportunities have been purposefully missed. There is an inherent tension between wanting to move as many people through a program as possible to demonstrate "volume" to funders and meeting the needs of companies. Snyder said the partnership turned down funding opportunities because other funders weren't aligned with the partnership's definition of execution excellence. It was difficult to reject a chance to serve more job seekers more quickly, but the partnership will benefit in the long run from its commitment to excellence.

To be sustained, the partnership will also need more funders to embrace the collective approach. Snyder said he learned that one cause of fragmentation within the workforce system is that each training or sourcing partner needs to be able to take credit for the progress of a single individual within their program to receive compensation from a funder. Through the partnership, that dynamic is shifting to where all the partners involved benefit from the success of individuals and the collective effort. Funders reward contribution to the improved overall outcomes, not just the specific services provided to an individual. That collective culture allows the individual service providers to navigate around blockages that might have kept them from success in the past because they no longer need to worry about claiming credit for each job seeker.

Just as funders want to see more manufacturing companies engaged in the partnership, Snyder wants more funders engaged, as well. The "learning sessions" that regularly bring members of the WFG together with the intermediaries to explore emerging lessons from the implementation are important to building funder commitment to the work. Vesy said the sessions are an extension of the learning culture adopted by the WFG years ago. Funders, intermediaries, partners, companies and others will need to continue to learn together if the system is going to be transformed. Just as she strived to create an environment for honest, open dialogue among funders, she has strived to do the same among the partners in the "learning sessions."

Karp from MAGNET is very familiar with the more traditional funder-grantee relationship; where the funder controls the conversation and grantees are often reluctant to share their concerns and problems. As the intermediary continues to work with WFG on implementation, he says he is heartened that several members of the WFG take the time to dig in deeply and promote the learning environment.

Carter from the county acknowledged that he will need to dig in more deeply with the intermediaries to understand whether and how the work is helping disconnected residents better access the workforce system. Other members of the group, too, shared that the level engagement by individual WFG members varies widely and more of them will need to be more deeply engaged as implementation proceeds.

While the work is still in its early stage, Snyder is now more excited about the potential to transform the workforce system than he is about the ability to generate short-term outcomes. One reason for his optimism is more manufacturers are reaching out to MAGNET about engaging in the effort because they are hearing from their peers that this is an effort worth their time. He and Schron see the building interest by manufacturers as a sign that system transformation is indeed within reach.

Snyder, Karp and others say transformation will only happen if the three workforce intermediaries are able to integrate their efforts in a way that makes it easier for supply-side partners to work across sectors. Kara Porter, who represents the United Way on the WFG, and other members said if integration isn't done well, training partners and social service agencies will struggle with meeting different expectations and tracking different outcomes from three different intermediaries. Snyder and Karp said that the infrastructure of the manufacturing partnership, including tools like the manufacturing discovery web site, were designed so that the other intermediaries could plug into what already was built.

The value of integration became more evident when the State of Ohio expressed interest in piloting its own post-pandemic attempt at workforce alignment in Cuyahoga County. Announced in September 2020, Ohio-to-Work is intended to align diverse programs from multiple state agencies with the sector partnerships in Cuyahoga County. Ohio-to-Work brings state funding and state programs to the WFG/Workforce Connect effort. When the state first broached the concept of Ohio-to-Work with Bill Koehler, chief executive of Team NEO, he encouraged the state to engage with Vesy, who as chair of the WFG could speak on behalf of the Cuyahoga partners. Koehler said that not having a single point of contact between the three sector partnerships and the state could create challenges in the future.

The State of Ohio's choice of Cuyahoga to pilot Ohio-to-Work validates the progress of WFG and the Workforce Connect effort. Koehler, Karp, and others see the opportunity to attract state resources and drive greater alignment of state programming as a significant step forward.

Turning that opportunity into sustained results that are valued by the diverse funders at the WFG table will be key to sustaining the effort. Five years after the preliminary meetings of the WFG began, one sector partnership has begun to produce very modest results. The other two are still in the development phase.

Under the terms of the agreements with each of the intermediaries, the WFG will make grant payments after specific milestones are achieved. One such milestone is the development of specific work plans with goals and outcomes metrics.

Under the terms of the agreement, the workplans "shall include the mandatory leveraging and use of applicable programs and services, and funding from the following sources:

- Workforce Innovation and Opportunity Act (WIOA)
- Temporary Assistance for Needy Families (TANF)
- Supplemental Nutrition Assistance Program (SNAP)
- Cuyahoga County Human Services Levy
- United States Department of Labor (DOL)
- Jobs Ohio
- Other Public & Private Funding Sources as appropriate

The leveraging of existing government programs and dollars, as well as targeting residents that receive government benefits, is a high priority for the county. Feinerman said the county will evaluate the success of the sector partnerships in part on how businesses increase their use of government-funded programs and services to recruit and train workers and how often they access government incentives to offset costs of employee training and development.

Vesy, Schron, and others are emphatic that the work of the sector partnership – and by extension the work of the WFG – is permanent work. Schron said he hopes philanthropy, as well as government, sees the value in investing and supporting efforts to strengthen key industries in Cuyahoga County. Much of the philanthropic wealth in the county traces its roots to the manufacturing sector, he said. So it is appropriate for philanthropy to invest in that sector so it can generate more philanthropic wealth in the future, as well as create good jobs for residents.

He said the sector partnerships shouldn't be viewed as three-year projects, but the way the community works together to assure more residents have the skills they need to succeed and support a growing economy.

Implementing the WFG's Strategic Plan

From its beginning, the WFG has been focused on transforming the workforce system, not only catalyzing programs. That system focus was reinforced in its 2020 plan. However, that plan did not articulate a set of activities or timetable for implementing the four strategies embedded in the plan.

The group is united in its commitment to support the implementation of the three sector-based partnerships. Some members expect that the group's work to address the other strategies embedded in its three-year plan adopted will become clearer as the partnerships begin to generate measurable outcomes. However, at the end of September 2020 the group had not agreed on how to advance the other workforce strategies.

Regenerate

Regenerate is the fourth phase of the collaboration cycle. This is the phase where partners in a collaboration reflect on their progress, respond to changes within the system, many of which were outside their control (such as a global recession or a pandemic) and decide whether they want to continue their journey together by asking new questions and re-entering the explore phase.

The WFG and the three sector partnerships it catalyzed will enter this phase at different times over the next 12 to 36 months. It is likely that the WFG will enter the regenerate phase first, in part because members will need to renew their financial commitment to both their work as a group and the work of the sector partnerships.

Whether the regenerate phase is the last phase or just another phase in the sustained work of the WFG will depend on the outcomes generated by sector partnerships and how they view and value the lessons they've learned.

Key Lessons Summary:

- **Collaborations don't happen within a vacuum; they are shaped by context.**
- **Collaborations require the exercise of distinct types of leadership.**
- **Funder commitment is required to catalyze systemic change.**
- **Early agreement on desired change provides a foundation and clarifies the shared purpose of diverse funders.**
- **Strategy development demands narrowing of focus, expertise, broad engagement and broad buy-in.**
- **Collaboratives constantly evolve in response to several factors, including capacity constraints, progress of strategies, partner commitment and leadership.**
- **Trust-based process builds commitment and accelerate momentum.**
- **Transformation requires resources and strong partners.**
- **Building a learning culture among funders, intermediaries and partners pays dividends.**
- **Each intermediary is distinct, which requires the WFG to be flexible and adapt.**
- **Collaborations evolve in ways that can make the next steps unclear.**

Members of the Workforce Funders Group

Since early in its formation nine organizations have been represented at the WFG, but different individuals from those organizations have represented those organizations. The following is a list of the people who represented the organizations between late 2015 and Sept. 30, 2020.

City of Cleveland

- Natoya Walker-Minor, Chief of Public Affairs

Cleveland/Cuyahoga Workforce Development Board

- Quentin McCorvey, Board Chair
- Micki Tubbs, Board Chair
- Ethan Karp, Board Chair
- Grace Kilbane, Executive Director
- Frank Brickner, Interim Executive Director

The Cleveland Foundation

- Ronn Richard, President
- Shilpa Kedar, Program Director
- Lillian Kuri, Senior Vice President for Strategy
- Stephen Caviness, Program Officer
- Keisha Gonzalez Roberts, Program Manager Social Impact Investing and Community Development Initiatives (main)

Cuyahoga County Government

- Armond Budish, County Executive
- Sharon Sobol Jordan, Chief of Staff to County Executive
- Matt Carroll, Chief Economic Growth and Opportunity Officer
- Ted Carter, Chief Economic and Business Officer
- David Feinerman, Head of Workforce Innovation

Deaconess Foundation

- Deborah Vesy, President
- Lissy Rand, Vice President

Fund for Our Economic Future

- Brad Whitehead, President
- Bethia Burke, President and formerly Vice President
- Janine Kaiser, Director of Job Preparation

George Gund Foundation

- David Abbott, President
- Robert Jaquay, Associate Director
- Alesha Washington, Program Director for Vibrant Neighborhoods and Inclusive Economy

Greater Cleveland Partnership

- Joe Roman, President & Chief Executive Officer
- Shana Marbury, General Counsel and Senior VP of Talent

Team Northeast Ohio

- Bill Koehler, Chief Executive Officer

United Way of Greater Cleveland

- Bill Kitson, President
- August Napoli, President
- Ben Jones, Director of Financial Stability
- Nancy Mendez, Vice President, Community Impact
- Kara Porter, Director of Education and Workforce Readiness

About the Case Study

The case study was commissioned by the WFG, with support from Deaconess Foundation. It was written by Chris Thompson, president of Civic Collaboration Consultants, LLC, based on his interviews with 25 individuals, multiple meetings with a subgroup of the WFG, and a review of WFG documents. Thompson designs, supports and evaluates cross-sector collaborations. He has worked with collaborations focused on workforce, economic development, entrepreneurship, education, and public health.

Workforce Funders Group Documents

- Workforce Transformation for Cuyahoga County, approved by WFG on July 12, 2016
- WFG Action Plan from Fall 2016
- Developing Sector Partnerships in Cuyahoga County, issued by Sector Partnerships and Intermediaries Task Force, Jan. 8, 2018
- Request for Letters of Interest for Manufacturing Sector Intermediary, Oct. 4, 2018
- Request for Proposal for Manufacturing Sector Intermediary, Oct. 16, 2018
- WFG Disclosure Statement, June 2019
- WFG Request for Letter of Interest for Consultant, May 29, 2020
- Workforce Connect news releases issued on Dec. 12, 2018, Sept. 25, 2019, and July 14, 2020 related to selection of intermediaries for each sector partnership
- 2018 grant agreement with MAGNET/GCP
- 2019 grant agreement with Cuyahoga Community College
- 2020 grant agreement with GCP-RITE

Interviewees for Case Study (Interviews were conducted August-October 2020)

- Frank Brickner, interim executive director, Cleveland/Cuyahoga Workforce Development Board
- Bethia Burke, president, Fund for Our Economic Future
- Matt Carroll, chief economic growth and opportunity officer, Cuyahoga County
- Ted Carter, chief economic development and business officer, Cuyahoga County
- Stephen Caviness, former program officer, The Cleveland Foundation
- David Feinerman, head of Workforce Innovation, Cuyahoga County
- Keisha Gonzalez, program manager of social impact investing and community development initiatives, The Cleveland Foundation
- Bob Jaquay, associate director, George Gund Foundation
- Janine Kaiser, director of job preparation for Fund for Our Economic Future and consultant to WFG
- Shilpa Kedar, former program director for economic and workforce development, The Cleveland Foundation
- Ethan Karp, CEO MAGNET and chair of Cleveland/Cuyahoga Workforce Development Board

  Grace Kilbane, retired executive director of Cleveland/Cuyahoga Workforce Development Board
- Bill Koehler, CEO, Team NEO

- Loh-Sze Leung, principal, Leung Consulting
- Shana Marbury, general counsel and senior vice president, talent, Greater Cleveland Partnership
- Kara Porter, director of education and workforce readiness, United Way of Greater Cleveland
- Lissy Rand, vice president of grant making and strategy, Deaconess Foundation
- Jack Schron, Cuyahoga County Council and president, Jergens Inc.
- Adam Snyder, managing director, sector partnerships, MAGNET
- Sharon Sobol Jordan, former chief of staff to Cuyahoga County executive
- Caroline Taich, president, Kirtland Consulting
- Micki Tubbs, CEO of Fit Technologies and former chair of Cleveland/Cuyahoga Workforce Development Board
- Deborah Vesy, former president and CEO, Deaconess Foundation
- Natoya Walker-Minor, chief of public affairs, City of Cleveland
- Chas Withers, CEO, Dix & Eaton