Quick Guides for Collaboratives

Ready to Form a Regional Workforce Collaborative? Here is How to Get Started.

A regional workforce collaborative coordinates local, cross-sector stakeholder efforts that help workers access good jobs, direct employers to the talent they need, and build more prosperous communities. A collaborative goes beyond one organization's initiative to formalize a shared vision for a specific region and aligns resources (money, expertise, time) to advance that vision. Collaboratives are ideal for tackling entrenched, systemic issues.

Set up a workforce collaborative in your area to obtain the following types of outcomes:

- Provide space for stakeholders to share **knowledge and expertise**.
- Understand the **root cause** of problems, needs, and gaps to develop a path for making systems change a reality.
- Incentivize and create greater **alignment** and **coordinated leadership** among partners.
- Encourage **innovation** by spreading financial and reputational risk for investments in a pilot programs.
- Support local and regional **advocacy** and **public policy changes**.
- Speak with a **coordinated voice** on important local issues.
- Tap into **new funding** streams.

What could a collaborative do for your community? Review our quick guide, Know Your Collaborative's Value Proposition.

Start by asking these questions

Who should be at the table?

Clarify the issue, challenge, or idea driving the need for a collaborative, and then consider who needs to be at the table. Does the potential stakeholder care about the work? Do they contribute to it directly? Might they pose some resistance? Assemble a coalition of the willing. Check out our quick guide, Connecting Your Regional Workforce Collaborative with Private Funders.

How do you create a shared sense of ownership and accountability?

Engage partners to identify your collaborative's vision, mission, goals, strategies, and plan to address duplication and achieve consensus. Take time to build relationships, rapport, and trust — crucial ingredients to the success of your collaborative. Small working groups may help this process.

How do you make decisions collectively?
Establish the decision-making structure for your collaborative early on. Determine which members vote on which decisions and whether questions are decided by consensus or by majority. Include people with lived experiences in the decision-making process.

How do you demonstrate success?
Members should see the collaborative's progress. Build momentum with small, early wins. As your work continues, collect, analyze, and reflect on outcomes to tell a compelling story of impact in achieving your mission, vision, and goals.

Where should your collaborative "live"?
Your collaborative needs a home to serve as its backbone. This backbone provides invaluable administrative support, including managing any pooled funds, contracts, and staff. Collaboratives tend to work best when they have a distinct identity from their fiscal agent or organizational home yet are seen working closely to further shared priorities and goals.

How do you fund the work of your collaborative?
It takes resources to collaborate and staff to continue the momentum. Luckily, there are many funding sources to support the operations of your collaborative. Refer to our quick guide, Funding Your Regional Workforce Collaborative.

Watch out for

Tense relations with the local workforce board. Reach out early to establish a relationship with the board. Highlight the ways a collaborative can support the workforce board by being a partner, potential funder, and advocate.

Loss of stakeholder interest over time. Be opportunistic by identifying places to make early progress. Don't underestimate the need to build trust to create buy-in for the long term.

Turnover of key partners and staff. Consider methods to sustain the work in case individuals move on to other roles.

Duplication of other community efforts. Carefully interrogate whether and how your collaborative is fulfilling a need and not duplicating efforts. It may not be necessary or productive for the collaborative to be in the lead every time. Look for opportunities to leverage or add support to existing efforts that advance your desired workforce outcomes.

Funder disinterest. Funders may ask why they should support an intermediary like a collaborative rather than making a grant directly to a workforce organization or program. Be sure to clearly define the collaborative's added value and have a ready response to this question.

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Know Your Regional Workforce Collaborative's Value Proposition

In most regions, there are a lot of players in the workforce development ecosystem. It's important for your regional workforce collaborative to stand out in this often-crowded landscape. Do this by clearly defining and communicating your value proposition to various audiences. A well-crafted value proposition succinctly describes how your collaborative is uniquely positioned to add value in the workforce ecosystem. It names the collaborative's key differentiators and areas of potential impact and frames them in compelling language.

Here's what a clear value proposition can do for your collaborative:

- Differentiate the collaborative's work within the local context.
- Help members align their work and recruit other partners.
- Demonstrate that the collaborative is addressing a meaningful local need and supporting long-term sustainability.

Start by taking these steps

- **Assess the local context.** Examine the environment that shapes workforce development in your region: Which policies and practices drive local workforce outcomes? What does the disaggregated data tell you about the experience of workers and job seekers? Which industries are growing or declining? See the Community Scan Worksheet in our Sustainability Guide for Funder Collaboratives.

- **Conduct an environmental scan and stakeholder analysis.** Gain an understanding of the key individuals and institutions in your workforce ecosystem and the work they are doing: What does this tell you about gaps, duplication, and needs? Where might relationships be helpful across the ecosystem? See the FSG Guide to Actor Mapping and our Stakeholder Analysis Worksheet.

- **Assess your strengths.** Engage key stakeholders, funders, staff, grantees, and community members to identify what the collaborative does well or is positioned to do well. Create a "top 10" list of key strengths. See David Cooperrider and Associates' Appreciative Inquiry method.

- **See how your strengths stack up against other organizations in the workforce ecosystem.** Take a look at the list of organizations generated in your environmental scan and identify your unique strengths. Create your own comparative matrix.

- **Discern the implications of your unique strengths.** What does your combination of unique strengths mean for workers, job seekers, businesses, and other stakeholders? What impact might members make by participating in this collaborative? See Strategyzer's Value Proposition Canvas.

What key stakeholders say

Need some inspiration? Here's what members of the National Fund name as the value of participating in a collaborative:

- **Philanthropic funders:** Leveraging their own grantmaking dollars and sharing the financial risk of newer investments; engaging in policy advocacy when individual organization policy is limiting; amplifying their voices and priorities. See our quick guide, Connecting Your Regional Workforce Collaborative with Private Funders.
- **Public system:** Demystifying the public workforce system for key partners; sharing the burden of voicing the need for funding and policy changes; having the opportunity to shape what philanthropic funding supports.
- **Service providers:** Having one coordinated table to simplify reporting, metrics, funding applications, and priorities; accessing labor market information; finding partners to deliver on complex outcomes when capacity is limited.
- **Employers/businesses:** Accessing an honest broker to connect to a variety of options and resources and having support for shaping workplace practices.
- **Unions, labor management partnerships, and worker centers:** Having a table where voices and experiences are equally valued and where information about workforce policy and program decisions can be shared.

All audiences said they benefit from shared learning, increased visibility of workforce as an issue, and the amplification of voices through a shared agenda and priorities.

Watch out for

- **Setting up the collaborative as a savior.** Avoid messaging such as, "We are here to change/save/reform the workforce system." Focus on how a collaborative can complement existing programs and structures, bring new resources and partners to the table, and partner to strengthen the workforce ecosystem.
- **Using a "stigma" narrative.** Be careful not to define job seekers, workers, and potential participants by their challenges or define in personal terms the challenges to be addressed (e.g., "We are helping low-skilled workers gain middle-skill credentials."). Focus instead on the collaborative's assistance in addressing systemic challenges and barriers.
- **Confusing the value and identity of the regional collaborative with its fiscal sponsor or home.** Make sure you co-create a common vision and set priorities that collaborative members can jointly own and buy into.

Center equity

- **Consider impacts on people of color and marginalized populations at each step in the definition of your value proposition.** How is racial equity being addressed in the workforce system? Which policies or practices have disparate impacts on opportunities and outcomes for people of color? Who is currently addressing these inequities?
- **Address equity clearly.** Be explicit in the value proposition about the collaborative's goal to increase equity and close disparities. Center equitable outcomes within your collaborative's goals.

Learn more

Alyssa Conrardy, "Determining your nonprofit's unique value proposition for donors and funders (finding your reason for being)," Prosper Strategies blog.

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Funding Your Regional Workforce Collaborative

You've brought your collaborative's stakeholders to the table, identified your value proposition and set your priorities. Now it's time to fund the collaborative's operations and programs. Your local community foundation and other philanthropic entities are likely already on your radar. Consider the following additional funding sources and approaches.

Philanthropic Funding: Going Beyond Discretionary Grants

In addition to applying for discretionary grants, think about building relationships with philanthropic advisers or donor services staff at local community foundations, large financial institutions, and other organizations that have donor advised funds, field of interest funds, or trusts. Educate these staff members about the collaborative so they can connect interested donors with your work. Ask members of the collaborative to establish relationships with local giving circles that focus on target populations, geographies, or giving strategies.

Private Sector or Corporate Support

Besides grant funding from corporate foundations or corporate giving programs, the collaborative may wish to explore sponsorships to support convenings, events, publications, or other high-visibility activities. Collaboratives can also obtain in-kind contributions for consulting, legal, communications, information technology, or other professional services or get donations of space, software, or equipment to support operations and reduce costs. Look into leveraging the Community Reinvestment Act to encourage local depository institutions to participate in and contribute to the collaborative.

Public Funds

The ability to access public funding depends on the strength of your collaborative's relationships with public sector partners. It also helps if public sector partners see their mandate as broader than administering Workforce Innovation and Opportunity Act (WIOA) funds. Collaboratives should demonstrate that the support of the public workforce system benefits everyone. Here are potential sources of public dollars:

- **Federal Grants:** Collaboratives interested in competitive federal funding should regularly check the U.S. Department of Labor Employment and Training Administration and Grants.gov for new announcements. Note that federal grants require significant fiscal management capacity, although they are also often large enough to be able to support collaborative capacity and activities.

- **Local WIOA funds:** Under certain conditions, local workforce boards have the flexibility to contract directly with institutions of higher education or eligible training providers if it would facilitate training for multiple individuals in high-demand occupations or if there is a proven training program offered by a community-based organization or other private organization, and if such a contract does not limit customer choice.[1] Regional collaboratives can work with their local boards to determine if direct contracts using WIOA funds can support training connected to the needs of a local industry partnership. In addition, WIOA provides flexibility for local areas to support employer services and coordination activities using adult and dislocated worker funds. This may allow the local board to support industry partnerships and related services to employers and collaborative work related to improving coordination, services, and linkages among different workforce-related programs and activities.[2] Be aware that although WIOA allows for these uses it does not specifically fund them, and so some workforce boards may be reluctant to use limited funding this way.
- **State WIOA Funds:** WIOA allows governors to reserve up to 15% of WIOA state allocations to support statewide or innovative projects. Historically, these funds have supported the implementation of career pathways, bridge programs, sector initiatives, and other workforce approaches considered innovative. Collaboratives seeking these funds should build relationships with their state labor and workforce leaders to better understand how these funds are allocated and to partner on strategies that advance the state's workforce goals. These funds could possibly support collaborative operations in addition to capacity building, coordination, and workforce training strategies.
- **Supplemental Nutrition Assistance Program (SNAP) Employment and Training (E&T) 50/50 funds:** The U.S. Department of Agriculture's SNAP E&T program helps SNAP recipients access training and supportive services to enter into the workforce or advance in their careers. Every state must operate a SNAP E&T program, but each can design it to meet local needs and requirements. SNAP E&T agencies can partner with providers such as community colleges, community-based organizations, and others that use nonfederal funds to provide education, training, and support services to SNAP recipients. Although SNAP E&T dollars cannot support collaborative operations, they may be used to enhance or expand services by allowing grantees to draw down reimbursement for nonfederal dollars spent on SNAP recipients. For more information, see the National Association of Workforce Board's Workforce + SNAP E&T Community of Practice.
- **State workforce funds/grants:** Many states have established workforce training funds or other state competitive grant programs. These may be held at the state department of labor and workforce development, education, economic development, or even other departments, depending on the focus of the training/activity. Some states budget general funds or utilize funding generated from a surcharge on unemployment insurance (UI) to support workforce development programs and initiatives. For example, Texas has the Skills Development Fund, and

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1. See pages 9-10 of training and employment guidance letter WIOA No. 3-15, Operating Guidance for the Workforce Innovation and Opportunity Act (Employment and Training Administration Advisory System, U.S. Department of Labor, July 1, 2015), https://wdr.doleta.gov/directives/attach/TEGL/TEGL_03-15_Acc.pdf

2. See page 16 of WIOA No. 3-15, https://wdr.doleta.gov/directives/attach/TEGL/TEGL_03-15_Acc.pdf

Massachusetts has the Workforce Training Fund Program. Although funding from UI-supported funds is generally limited to businesses that pay into the funds, other state workforce grant funds, such as the Massachusetts Workforce Competitiveness Trust Fund or the Ohio Industry Sector Partnership Grant, may be more flexible and may even require a match from business, philanthropy, or other sources that are typically part of a collaborative. Look to these sources to support your collaborative's needs in training, industry partnership development, and coordination. Keep in mind that workforce boards are often but not always required partners on these grants.

- **Local workforce funds and grants:** Some cities and counties have competitive workforce funding grants or trust funds that collaboratives and their grantees whose programs and services benefit local residents may be able to access. Sometimes funds are generated by or attached to local development or hire requirements. Collaboratives should stay in close contact with local economic development organizations and local workforce and elected officials to learn whether and how to access these funding sources. For example, Boston's Neighborhood Jobs Trust, funded by linkage fees based on the square footage of commercial development projects over 100,000 square feet, has long been a source of support for the SkillWorks funder collaborative and its occupational training programs and strategies that benefit Boston residents.

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Connecting Your Regional Workforce Collaborative with Private Funders

Private funders are important constituents to engage in your regional workforce collaborative. In fact, several members of the National Fund network are funder collaboratives, in which private funders are core members and align philanthropic dollars to workforce initiatives. These funders are instrumental in influencing workforce policies and practices. Their priorities, expectations, and metrics can explicitly or implicitly drive behavior in the workforce ecosystem.

Start by taking these steps

- **Connect, connect, connect.** As with all stakeholders, building a relationship with funders is key. Everyone likes to be asked what they are interested in and what motivates them. Funders are no different. Learn about their grantmaking and investment priorities, their work, and their current and future interests. Ask what would bring them to a collaborative table — and what would send them running from the room. Find out about their appetite for risk. Sharing the risk of a new or untested but potentially transformative investment is attractive to many funders who may find it easier or more palatable for their boards to fund something if their peers are alongside them.
- **Think beyond the purse for long-term engagement.** Beyond providing financial support for the collaborative's work, funders can play a number of other important roles. They can serve as collaborative spokespeople and validators, inviting peers and other stakeholders to the table. They can chair committees or workstreams. They can fund programs, capacity building, or research aligned with the collaborative's work. As investors and leaders, they can provide feedback and insight to help shape the collaborative's priorities. Communicate with funders on a regular basis to facilitate their participation and leadership, being clear about how they can support you. For instance, ask funders to serve in leadership positions of the collaborative and then provide the support needed to be successful in those roles. Think about making these asks using peer-to-peer relationships. Remember to take time to have regular, one-on-one check-ins with funders to sustain engagement.
- **Walk away when you need to.** Sometimes the "juice" from a particular grant or funding opportunity is just not worth the "squeeze." Consider whether the effort required to submit and manage the grant is worth the resources that the grant provides. Consider whether the grant aligns with or builds on your collaborative's mission, vision, and strategies or if it will take you off course. Consider the opportunity costs of pursuing and accepting the funds. What will you not be able to do if you take on this grant? The cost of a grant may be too high if it takes you off course, threatens to eclipse the central work of the collaborative, or siphons time and resources away from key goals and activities.

- **Remember there are other funders out there.** Funders involved in your collaborative can be any public or private entity that invests in or is interested in investing in workforce development. Funders might include local or state workforce agencies; workforce investment boards; private, independent, family, or corporate foundations; corporate giving programs; community foundations or other grantmaking public charities; operating foundations; giving circles; United Ways; or individual philanthropists. See our other quick guide, Funding Your Regional Workforce Collaborative.

Watch out for

- **Allowing one funder to dictate the direction or priorities of the collaborative.** This can be tricky if one or two funders are the acknowledged leaders, provide the most funding to the collaborative, or serve as the fiscal home of the collaborative. Strong governance structures, consensus building, and policies like "one funder/ member, one vote" can help. However, your collaborative may still need to deal with these situations outside of formal meetings, using trusted messengers to manage relationships and power dynamics when necessary.
- **Having too much earmarked funding and too little operating funding.** Collaborative budgets are complicated enough to manage without funders earmarking their funding for specific programmatic priorities or initiatives. Although earmarked funding may be helpful in some circumstances — to get a new initiative off the ground, for example —collaborative directors should communicate clearly with funders about the resources needed to operate. You can handle this by setting the expectation that all funders contribute a baseline amount to support operations. Funders then have the option to provide additional funding for specific priorities within the collaborative's strategic plan.
- **Privileging one type of funder over another.** Few things are more frustrating than feeling like your voice does not matter. Be sure to set up collaborative structures and engagement strategies to value all contributors, whether public, private, or corporate.

Center equity

- **Be inclusive.** Even as you engage funders, be sure to create space for other voices in the collaborative and be thoughtful about those processes.
- **Manage power dynamics.** Collaboratives with funders and other workforce stakeholders should carefully manage evolving power dynamics. Consider setting up committees co-chaired by one funder and one nonfunder or creating an advisory committee of nonfunders with a clear governance role that can meet separately to promote honest feedback and dialogue and provide feedback to the funders. Examine and then change any practices that reinforce negative power dynamics or dominant culture norms. Ask your collaborative: "Do we create space to engage and hear from diverse voices? How?"

Learn more

- Cynthia Gibson and Anne Mackinnon, "Funder Collaboratives: Why and How Funders Work Together," Candid. Learning blog, Jan. 1, 2010.
- "Key Ingredients for an Effective and Healthy Funder Collaborative," Candid. Learning blog, Jan. 24, 2016.
- Loh-Sze Leung and Lisa Soricone, Sustainability Guide for Funder Collaboratives (Oct. 24, 2016). See Results, Process, and Relationship Checklist, page 15, and Section 2, pages 37-38.