

Assessment of the WSG and SkillWorks Public Policy Advocacy Efforts during the 2012 Legislative Session

INTRODUCTION

From its establishment in 2003, SkillWorks has placed a high priority on achieving public policy changes in the Commonwealth's workforce development system as well as advocating for resources to help residents advance in their careers and to assist businesses in accessing a skilled workforce. The Workforce Solutions Group (WSG) has been the primary vehicle for its public policy work, with increasingly active engagement of the SkillWorks staff in advocacy and systems change during Phase II.

Mt. Auburn Associates has reported on both the progress and challenges of SkillWorks' public policy work during Phase I and in the first two years of Phase II, highlighting successes, including the creation and funding of the Workforce Competitiveness Trust Fund (WCTF), raising awareness and building a constituency in the state focused on workforce development, and increasing or retaining critical funding for key parts of the workforce development system in the Commonwealth.

Between January 2011 and the end of 2012, SkillWorks and WSG focused much of their policy work on gathering support for the Middle-Skills Solutions Act. Senator Kenneth Donnelly and Representative Cheryl Coakley-Rivera, along with a total of 54 co-sponsors from both houses of the state legislature, filed the Act in January 2011. During this time period, WSG and SkillWorks also continued work to maintain funding streams of critical importance to the workforce system. Specifically, the work of WSG and SkillWorks played a major role in the allocation of \$5 million into the state's WCTF as well as other legislative language that involved increased resources and potential system change for the workforce development system.

Rather than completing another annual report on all of the activities and outcomes of the public policy work during this period, SkillWorks asked Mt. Auburn to examine the process utilized by WSG and SkillWorks in terms of their work with the executive branch and the state legislature. The purpose of this report is to better understand if and how the work of WSG and SkillWorks contributed to recent legislative successes, the relative importance of the different processes and tactics that were used, and, most importantly, how policymakers involved in the executive branch and legislature perceived this work and were influenced by it.

The data for this report come entirely from a set of interviews that Mt. Auburn conducted between September 2012 and December 2012. These interviews included:

- staff of state agencies;
- state senators and representatives;
- legislative staff; and
- members of the WSG.

Attachment A includes a full listing of those interviewed and Attachment B provides the interview protocol which was used.

THE CONTEXT

Actors Involved

The effort to re-fund the WCTF and to achieve some other changes in the workforce system that would improve outcomes of low-skilled workers involved the following actors:

- **Workforce Solutions Group:** The Executive Team (E-Team) overseeing the work of WSG is comprised of the Crittenton Women’s Union, the Massachusetts Communities Action Network, the Massachusetts Workforce Investment Board (WIB) Association, the state AFL-CIO, the Massachusetts Workforce Professionals Association, the Massachusetts Business Roundtable, and the Northeastern Center for Labor Market Studies. Both the group as a whole as well as individual members of WSG were actively engaged in the public policy work with the legislature and state agencies. In 2012, WSG transitioned from having a staff director overseeing the work to having an outside consultant, Katherine Mainzer of The Strategy Group, staffing the work. Kathie, who was also a consultant working on public policy advocacy directly with SkillWorks, has extensive experience working at the State House and has strong relationships with both legislators and legislative and committee staff.
- **SkillWorks:** Since 2010, Loh-Sze Leung, the executive director of SkillWorks, has taken on a more distinct and independent role in the state’s workforce development landscape. In effect, SkillWorks has developed a public policy capacity distinct from WSG. The executive director’s work has included playing a key leadership role in the formation of the Skills2Compete-Massachusetts campaign and leading the production of the *Massachusetts’ Forgotten Middle-Skill Jobs* report. In addition, Loh-Sze has become increasingly engaged in public policy advocacy work and has increased visibility with legislators and their staff as well as state and federal workforce development and higher education officials. Over the course of the public policy work in 2012, SkillWorks’ executive director played an important role in efforts to educate key state legislators involved in workforce development and to support efforts to promote workforce system reform in the Commonwealth.
- **State Executive Branch:** Both the Commonwealth Corporation and individual state agency leadership have taken an active role in promoting workforce system change in Massachusetts. As the home of the WCTF, staff from the Commonwealth Corporation play a particularly important role in efforts to re-capitalize the WCTF.

The Middle-Skills Solution Act

In late 2010, following the release of the *Massachusetts’ Forgotten Middle-Skill Jobs* report, and the launch of the Skills2Compete-Massachusetts campaign (covered in the last system change evaluation report for SkillWorks), WSG and SkillWorks drafted a piece of legislation, the Middle-Skills Solutions Act, to push forward a series of policy recommendations that were part of the campaign. The focus of the WSG and SkillWorks public policy work during 2011 and 2012 involved advocating for a number of workforce-related line items in the budget and working for the enactment of the Middle-Skills Solutions Act.

This Act (Senate Bill 921; House Bill 2713) had the following three sections:

1. establishing a middle-skills council that would make recommendations to increase the readiness and success of working adults and other non-traditional students in education and training in order to increase the number of adults with middle-skill jobs;
2. establishing Regional Skills Academies or Partnerships, which would be aligned with the state's economic development strategy, to address the gaps between the skills currently held by workers and the skills needed by employers; and
3. requiring a regular review of local and regional labor market information and the development of regional plans to coordinate training and education activities to meet the state's demand for middle-skill workers.

Senator Kenneth Donnelly and Representative Cheryl Coakley-Rivera filed the resulting legislation in January 2011. Associated with this bill was a request for \$8 million annually from the consolidated budget surplus or the General Fund to support the Regional Skills Academies/Partnerships through the Workforce Competitiveness Trust Fund.

Legislative Achievements

The focus of this report is on the 2011-2012 legislative session, which resulted in some significant public policy successes for WSG and SkillWorks. The achievements include:

1. allocation of \$5 million to the Workforce Competitiveness Trust Fund as part of the Economic Development and Jobs Bill and establishment of a middle-skill subcommittee of the WCTF Advisory Committee;
2. \$3.2 million in Rapid Response workforce development grants for employers working with community colleges for training needs;
3. \$3.25 million for new scholarships for students studying for careers in high-demand industries at public colleges and universities;
4. requirement that the state workforce investment board undertake annual reviews of local and regional labor market information;
5. establishment of the Massachusetts Advanced Manufacturing Collaborative and the Commonwealth's Advanced Manufacturing Futures Program; and
6. inclusion as an outside section in the fiscal year 2013 state budget of a Community College Workforce Development Grant Fund modeled after the Workforce Competitiveness Trust Fund, but overseen by the Board of Higher Education. Resources for the fund will come from \$12 million a year from revenue associated with gaming license fees in Massachusetts. In addition, WSG partners were included on the Fund's Advisory Board.

WSG and SkillWorks played various roles in these successes. SkillWorks and WSG played a major role in securing the \$5 million allocation to the WCTF. Funding for the WCTF has been a

longtime priority of WSG, and WSG has worked diligently over the past five years raising awareness of the WCTF and its importance in terms of meeting the workforce needs in the Commonwealth. In addition, WSG and SkillWorks drove the campaign for funding WCTF at the State House. In terms of the other outcomes, WSG and SkillWorks played strong support or advocacy roles. While the allocation of funding for the Community College Workforce Development Grant Fund from gaming license fees was not a specific policy initiative of WSG or SkillWorks, legislative staff asked them to become involved in the design of the fund. The enacted language directly reflects the input that WSG and SkillWorks provided and aligns with the policy objectives of WSG.

The Process

The foundation for the WSG and SkillWorks policy work was the *Massachusetts' Forgotten Middle-Skill Jobs* report and the drafting of the Middle-Skills Solutions Act. The actual act that was developed by WSG was seen more as a vehicle for presenting some of its policy priorities. While the act had significant support, it became clear relatively quickly that in order to achieve some of their public policy goals, WSG and SkillWorks would need to be flexible, working to respond very quickly to what was occurring at the State House.

Over the course of 2012, the work took many turns. In January, advocates were pleased with a \$5 million proposed allocation for the WCTF in the governor's budget (through the consolidated budget surplus) and his linking of job training to the Commonwealth's education agenda and overall economic success.

The Middle-Skills Solutions Act was reported favorably out of the Labor and Workforce Committee. However, it became evident that passing the bill was unlikely given the many other major policy debates happening around healthcare payment reform, teacher evaluations, welfare reform, and job creation. As a result, WSG and SkillWorks turned to the House and Senate budgets, as well as the rumored Economic Development and Jobs Bill being developed by House Chairman Joseph Wagner, as vehicles for advocacy.

When the House released its version of the Jobs Bill in early May, it included \$10 million in funding for the WCTF in the consolidated budget surplus. Advocates were optimistic. However, when the governor filed a supplemental funding bill that authorized the spending of most of the consolidated budget surplus for other purposes, it became evident that there would be little, if any, resources left for the WCTF. WSG and SkillWorks then turned to the Senate and lobbied hard for a direct appropriation in the Senate version of the Jobs Bill. Eventually, the Senate version included an amendment for a \$5 million direct appropriation to WCTF. While the House funding at \$10 million was higher, it was through the consolidated budget surplus, which seemed increasingly unlikely. Therefore, WSG and SkillWorks turned their support to the Senate's version. The bill then moved to a Joint Conference Committee involving representatives of the Senate, House, and Administration. After a flurry of lobbying by SkillWorks, WSG, and legislative champions, the Conference Committee adopted the Senate version of a direct \$5 million allocation to the WCTF within the Economic Development and Jobs Bill.

The following table provides an overview of the timing of the major events in the evolution of the public policy work that led to the achievements in the 2011-2012 legislative session.

Date	Activity
July 2010	Release of the <i>Massachusetts' Forgotten Middle-Skill Jobs</i> report.
July 2010 – December 2010	Drafting and refinement of the Middle-Skills Solutions Act; securing sponsors.
January 2011	The Middle-Skills Solution Act filed in January 2011 with over 50 legislative co-sponsors from both the Massachusetts House and Senate.
October 2011	Skills2Compete-Massachusetts holds a breakfast briefing for business with Senators Dan Wolf and Kenneth Donnelly talking about workforce policy issues facing the Commonwealth.
November 2011	WSG organized testimony of 20 groups and individuals before Joint Committee on Labor and Workforce development in support of the Middle-Skills Solutions Act.
January 2012	Governor's budget includes \$5 million for recapitalization of the WCTF out of the consolidated budget surplus.
March 2012	Initial report out from Joint Committee on Labor and Workforce Development. Middle-Skills Solutions Act reported out largely as written. Led by Senator Kenneth Donnelly and Representative Cheryl Coakley-Rivera.
April 2012	Senate revises and new draft reported favorably by committee and referred to Senate Ways and Means. House budget comes out with no appropriation for the WCTF, but a new Community College Workforce Grant Fund using SkillWorks/WSG framework for successful workforce training partnerships. Up to \$12 million per year authorized for the fund, and WSG partners appointed to Fund Board.
May 2012	House authors and releases an Economic Development and Jobs Bill, which includes 90 percent of the Middle Skills Solutions Act and \$10 million in funding for the WCTF from the consolidated budget surplus. Senate budget released without funding for WCTF. Rapid Response Workforce Development Grants included in Senate budget as well as High Demand Scholarships.
July 7, 2012	The Jobs Bill released from Senate Ways and Means includes a \$5 million direct appropriation from general fund for WCTF and other provisions from the Middle-Skills Solutions Act. Lobbying to get House and Governor to accept the \$5 million appropriation.
July 2012	The House-Senate Conference Committee releases the Bill with appropriation included. SkillWorks is able to improve language for career centers with last minute advocacy.
August 8, 2012	Governor signs the Economic Development and Jobs Bill (H4352).

FACTORS INFLUENCING SUCCESS

Who Influences Workforce Policy

- ➡ **The issue of middle-skill jobs and the skills gap has become widely accepted within the state's public sector leadership.**

Those interviewed were often not able to articulate how their views on middle-skill jobs and the skill gaps were shaped. Yet, when asked about the state's workforce development challenges, almost all of those interviewed used much of the language and concepts developed through the work of SkillWorks in the Skills2Compete report as well as the work of WSG. As one legislative aide noted, *"I am not familiar with the report, so cannot say that the report was a catalyst."* However, this same aide used the term "middle-skill jobs" extensively in the interview. One legislator noted, *"It has become the buzzword in the State House in the last couple of years. There was not a vocabulary to describe that in the past."*

Governor Deval Patrick's "State of the Commonwealth Address" in January 2012 is perhaps the greatest indication of the level at which leadership has taken up the framing of the workforce development challenges of WSG and SkillWorks. Governor Patrick noted in the speech,

"Many of these openings are for so-called middle-skills jobs that require more than a high school diploma but not necessarily a four-year degree: jobs in medical device manufacturing, or as lab technicians, or solar installers, for example."

The governor also discussed the "skills gap," where people do not have the skills needed for the jobs that are currently available in the Commonwealth. These terms and examples seemed to be drawn directly from the *Massachusetts' Middle-Skill Jobs* report.

➡ Some of the most influential legislators as well as legislative staff viewed WSG as a credible source for workforce information.

Some of those interviewed, particularly the legislative staff, came to think about WSG as the go-to organization for policy issues related to workforce development. One of the more important policy staff people in the legislature, relatively new to the workforce policy area, reported that he found WSG to be one of the most credible sources of information in the field. This individual not only responded to WSG interests, but also proactively sought its opinion and counsel when actually writing legislation related to workforce issues. Specifically, the legislature asked WSG members to provide input to the language related to the creation of an annual \$12 million allocation of gaming license fee revenues for a workforce fund at community colleges. While initially this funding was to go directly to the community colleges, the language was shaped to ensure that the funding was utilized to meet some of the skill gaps in the regions and would involve multiple stakeholders in the state and region. Another legislator noted,

"The greatest compliment I can give them is that most of what we did in community college reform and workforce training and the Jobs Bill came from the ideas and comments provided by the WSG."

➡ The workforce-related perspectives of policymakers bubbled up from multiple organizations and a variety of activities.

One legislator described a "mushroom" effect, noting that a lot of different pieces of work came together, built upon each other, and got bigger and bigger in the process. The following are among the organizations and activities that influenced the legislators and their staff:

- the Job Creation Commission and its statewide tour were very effective at raising workforce issues, and many policymakers interviewed recalled the presentations of businesses in terms of the skill gaps during that tour. In particular, it helped that WSG e-team member and AFL-CIO representative Tim Sullivan served on the Commission, and that local WIBs targeted member businesses to testify at local hearings;
- state agency leadership;
- The Boston Foundation;
- individual organizations that are part of WSG;
- WIBs in some of the regions; and
- business organizations, particularly Associated Industries of Massachusetts (AIM), were mentioned frequently. In addition, a number cited groups representing specific sectors such as the Manufacturing Extension Partnership.

Factors Influencing Legislative Process

➔ The executive branch played a critical role in influencing the legislative outcomes.

The efforts of the Commonwealth Corporation (CommCorp), WSG, and SkillWorks were well aligned. Working from different angles, they were able to have a greater impact than they would have had working on their own. Together they were able to influence the administration's perspective on the WCTF and middle-skill jobs. And, having a policy perspective on workforce that was aligned with the administration's perspective was important to the ultimate success of the effort with the legislature.

Until recently, the state was able to fund innovative efforts like the WCTF and other workforce innovations through the state's set-aside from Workforce Investment Act (WIA) funds. When WIA funding was reduced and, more importantly, when the percentage of WIA that could be used for the state set-aside was reduced, the Executive Office of Labor and Workforce Development (EOLWD) asked the Commonwealth Corporation to develop a policy memo that would include new sources of funding that could make up for these losses. In its follow-up work, Commonwealth Corporation identified the WCTF as a good vehicle for addressing the cutbacks in the state set-aside. CommCorp developed a memo on WCTF for the Executive Office of Administration and Finance that provided details about the operations and outcomes of the Trust Fund and potential funding sources. This memo was important in terms of influencing the view of the administration in terms of supporting funding for the WCTF.

At the same time that CommCorp was working from within the administration, WSG and SkillWorks were meeting with the governor's office and some of the executive offices in the state. SkillWorks and WSG used data on the accomplishments associated with the WCTF provided by CommCorp to put together fact sheets on WCTF. A number of interviewees cited these fact sheets as being very important to making the case for reinvestment.

The result of the CommCorp and WSG/SkillWorks efforts was the very close alignment between the policy approach of WSG and SkillWorks and the executive branch. The fact that WSG had already done its work with the executive branch prior to going to the legislature was very important to some of the legislators who championed the effort to provide funding for the WCTF. And, the fact that the governor and the secretary of EOLWD were talking the same language and supporting a similar policy agenda was critical to the legislative success.

➔ **Timing, in terms of the economic context, was very important to the successful outcomes.**

Perhaps more than any other factor, those interviewed simply said that the timing was right. Basically, in the current economic environment, there was considerable focus on jobs. The case that there were jobs that were not being filled because of lack of skilled workers was very compelling given the economic circumstances. One influential legislator noted that there are a lot of worthy issues but, given the current economy, for legislators the issue of jobs rose to the top. The message about the skill gaps coming from the business community made the issue of workforce development a focal point of attention.

➔ **There is a lot of confusion about the variety of actors engaged in the workforce policy arena. However, it is not clear that this confusion impacted the outcomes in any significant way.**

Very few of the individuals who were interviewed were able to describe or name WSG as the organization that they interacted with around workforce development policy. For most, their association was more with the individual member of WSG with whom they interacted the most or with whom they had a previous working relationship. When reminded of the organizations that were involved in WSG, they often then acknowledged that the diversity of the groups within the organization was a positive factor in terms of its influence. The comment below by one of the legislators was echoed many times in the interviews:

“WSG—I met with them, know they came before the commission, and know they are advocating for more awareness of middle-skill jobs, but, honestly, I could not tell you their members.”

Similarly, many of the legislators and their staff referred more to The Boston Foundation than to SkillWorks when mentioning interactions with SkillWorks staff.

There was also some confusion related to the community college agenda. A number of those interviewed assumed that SkillWorks was the same as The Boston Foundation and associated the recent reform efforts and report related to community colleges with SkillWorks’ efforts.

In general, only one or two of the most involved staff were able to distinguish clearly amongst the multiple players. One staff person noted,

“My impression is that there are a number of different groups with similar sounding names that advocate in this area, all for the greater good. My impression is that much like the Commonwealth’s workforce development system, they can be occasionally unorganized.”

However, in the end, this same person noted, *“I think that the weight of that is good and helps drive results very often.”*

- ➔ **The fact that the WCTF had a track record and Commonwealth Corporation was able to report on its activities and outcomes throughout the state was a critical factor in gaining broader support for the re-funding effort.**

A number of the legislators and the staff noted that the previous experience of WCTF was extremely important in terms of the credibility of the organization. The fact that there was already hard work done in terms of implementing a complicated state program gave the re-funding effort *“more than the usual dose of credibility.”* In particular, many interviewees remembered and reported on the one-page sheet of accomplishments of WCTF. One staff person noted, *“When you are asking for more money, it is important to show hard data about how money has been spent in the past and why it was an effective and efficient way to do it.”*

- ➔ **Many of those interviewed reported that the tension related to community college policy at the state level was an underlying challenge.**

Although the interviews did not focus on the community college reform issues, almost every individual interviewed either thought that the workforce agenda of WSG and SkillWorks was also related to community colleges or brought up the larger policy tensions created as a result of the efforts of the governor as well as The Boston Foundation report related to community colleges. One legislative leader noted:

“The biggest challenge had nothing to do with WSG; it was the concern amongst community colleges that a focus on middle-skills job would impact their mission. It became a challenge to get legislators who were listening to the community colleges to also listen to us. WSG found that they were caught in the middle and sometimes associated with the TBF report.”

Importance of Different Tactics

- ➔ **The extremely strong advocacy and support of a few key legislators was perhaps the most influential factor.**

Many legislators look for advice from other legislators whom they trust and respect. When asked whom they go to when considering their positions, many said that they go to their legislative colleagues who spend a lot of time on that specific issue. In the case of workforce in the Senate, legislators brought up the leadership and influence of Senator Donnelly and Senator Wolf many times. In the House, they mentioned the leadership of Representative Wagner, chair of the Economic Development and Emerging Technologies Committee, and Speaker of the House Robert DeLeo.

Key champions in the legislature were also important in terms of opening doors for WSG and SkillWorks and understanding whom to contact when. Those in the legislature who were championing the work helped guide WSG strategically. This encouraged WSG to meet with key leaders such as the Senate president and the new chair of the Economic Development Committee. The legislative champions were also able to advise WSG on who within their team would be the most influential with different legislators.

- ➔ **A number of those interviewed cited WSG’s greatest strengths as being nimble, flexible, persistent, and good listeners.**

The specific success related to getting a \$5 million allocation of funding for the WCTF as part of the Jobs Bill depended upon being able to understand the process enough to be able to shift strategies midstream. A number of those interviewed praised WSG for not getting stuck once it became clear that there were issues with the approach of getting a commitment for the use of the state's surplus funds. Rather than continuing to advocate for the Middle-Skills Solutions Act or for funding for the WCTF through the surplus, WSG and SkillWorks seized the opportunity of looking to the Jobs Bill. One legislator noted they were smart to walk away from the consolidated surplus money. Another said, *"WSG adapted when they saw pushback. They were able to keep the central message, but make it more palatable...WSG was very flexible and did not get overly tied to their initial idea."*

Similarly, in terms of being nimble and good listeners, legislative staff, in particular, found the ability of WSG to listen carefully to the needs of important legislators and deliver relevant information very quickly to be helpful and to increase their credibility.

Finally, WSG was persistent. It had been working on recapitalizing the WCTF for a number of years and did not give up. Over time, it was able to increase awareness, educate key legislators, and build the case. It often takes a long time to gain this level of support. While other groups often give up, WSG kept working on it. Related to persistence, one senator noted that WSG, working with legislative leaders, would try to infuse something related to workforce in all relevant bills and in the budget process. This was important in terms of getting other legislators to talk about the issues and to raise awareness of the issues more generally amongst legislators and their staff.

By the time the legislature was considering the Jobs Bill, there was a very strong base of legislative leadership, both Democrats and Republicans, who were committed to seeing the WCTF funded. In terms of persistence, another legislative leader said of WSG, *"They were in early and they were in often,"* and that was the key to their success.

➔ **WSG's strength comes from both its individual members and the collaboration of the members.**

Some of those interviewed responded that the fact that WSG represented a collaborative of multiple parties speaking with one voice was important. In particular, many policymakers responded very positively to the fact that WSG has both the unions and the business community represented.

At the same time, WSG tactically used individual members in its efforts to educate and influence specific legislators. Thus, some of those interviewed reported meeting with Tim Sullivan of the AFL-CIO, with whom they had had a previous and trusting relationship, while others might note other individual members, such as Lew Finfer, with whom they had worked on other issues. WSG was strategic in deciding who from its team met with different legislators, when to go in as the collaborative, and when to make the case based on individuals within the E-Team.

➔ **Working behind the scenes and being strategic about contacts with legislators proved critical.**

As noted, many of those interviewed were not fully aware of what WSG was and did not understand the role of SkillWorks in the *Massachusetts' Forgotten Middle-Skill Jobs* report and skill gaps discussion. Many of these legislators who were interviewed, while positive about WSG and the process, did not attribute either their views on workforce development or their decisions to the work of WSG. *However, it is important to note that those in leadership positions did.* In other words, those in the leadership around this issue worked closely with WSG around whom to contact, when to contact them, and who within WSG would be the more effective representative. In addition, behind the scenes, WSG worked to have businesses and other stakeholders in the districts contact their legislators and provided the messaging. One of those in a leadership position reported:

“While I felt it was critically important that WSG was a coalition, it was not important in terms of other key legislators. Most legislators were unaware of the behind-the-scenes work...WSG knew when to attend meetings and when not to. This made them even that much more effective.”

➔ **Most of those interviewed noted that op-ed pieces and policy reports are primarily important for raising the policy issues early in the process.**

Interestingly, a number of those interviewed said that op-eds are not that important. One interviewee noted, *“Sometimes these pieces create enemies as well as friends.”* While no one interviewed saw the op-eds as a critical or stand-alone tactic, they did articulate that having the right messenger make the case is as an effective way of defining the problem.

While some of the legislative staff appreciate the policy reports and actually read them, for the most part staff did not perceive the reports as that critical, particularly as it became closer to decision time on legislation. Early in the process, some of the legislative staff reported that the reports helped them make the case to their bosses about why they should be concerned about workforce development. Research and policy reports were also noted to be useful at the Committee level. However, once a bill is reported out of Committee, legislators and staff rarely use these policy reports.

In general, while not critical to the process, the reports and media articles were important in terms of generating interest in the issues of the skills mismatch in the Commonwealth and in providing support for early efforts to raise the visibility of the Commonwealth’s workforce challenges.

➔ **Legislators respond most to stories and issues that directly affect their constituency.**

While data and policy reports were somewhat important to staff, legislators reported that a call or email from a constituent with a compelling story is probably what has the most influence on decisions. In the case of workforce development, a contact from a specific business in their district that reported that it had jobs, but was unable to find skilled labor, was extremely compelling. In fact, while the opinion of the general business community through the Business Roundtable was important, it was the contacts with individual businesses that were cited most often. As one legislator put it, *“When a business says, ‘I can hire six people today, but can’t find the six people to put in those jobs,’ that is a serious problem.”* Another legislator said, *“Contact from constituents is the brass ring.”*

➔ **Focusing on legislative committees is important.**

Interviews with leadership revealed the importance of the committees. One individual interviewed reported, *“We empower our committee chairs [in the Senate] to bring us the initiatives that they think are important. We trust the chairs. They do not need to be told what to do.”*

In general, it is important to work your way up to the top and start with the individual legislators who filed a bill and then to their committees. At that point, the committee, ideally, takes it to the leadership. But it is also important to focus the advocacy work on the right committee, where leadership is most likely to champion the issue and has the most leverage.

In the case of the workforce development agenda, the leadership of the Economic Development Committee and its “owning” the agenda contributed greatly to the workforce successes in the legislative session.

➔ **Key legislative staff are very influential.**

Interests and commitment of the leadership often emerge from the policy perspectives of their staff. In the case of Senate leadership, the *Massachusetts’ Forgotten Middle-Skill Jobs* report, completed as part of the Skills2Compete campaign, influenced Senator Donnelly’s chief of staff. Given Senator Donnelly’s priorities, his staff believed that focusing on workforce development would be something of interest to the senator. In fact, the senator decided to champion this work and, as noted, his leadership was probably the most important factor in the legislative successes. Equally important was Chairman Wagner’s staff who put the WCTF and the Middle-Skills Solution Act in the Jobs Bill, which was the moving train in this session.

Throughout the interviews, legislators referred to the work and perspectives of their staff and noted that their involvement is critical. And, the staff who were interviewed were the most likely to have been influenced by the policy studies and reports and to look to WSG as a credible source to go to when there was any type of workforce development-related issue.

WORKFORCE DEVELOPMENT PRIORITIES AND GAPS

The interviews also provided some insights into what those in state agencies and those working in the State House think are the major workforce development priorities that need to be addressed. In responding to this question, many noted that legislation is not always the answer. They felt that there were issues related to the workforce system that could be addressed through non-legislative means. Specific themes that emerged were:

➔ **The lack of coherence of the workforce development system and the difficulty in explaining it remains a critical challenge for public policy reform.**

When asked what the highest priority gaps or priorities were, the most common response involved the complexity of the workforce system. Sometimes this complexity was posed in terms of the “customer” and sometimes in terms of the larger system. For example, in noting the confusion in the workforce arena, some said that if someone was unemployed they would not know where to tell him to go for assistance. Similarly, the business community found the

system to be confusing. For many, the best way to get more funding into workforce was to streamline the system and make it more understandable to the public, to the business community, and to state policymakers.

➔ **There is interest in improving the ability of the workforce system to measure success.**

In the current fiscal and economic environment, it is increasingly important to be able to make the case that a specific investment is effective in achieving its outcomes. To date, evidence of this success has been a problem in efforts to support increased investment in workforce development. In the future, there will be increased expectations of evidence of success.

➔ **Increasing the advocacy and engagement of the business community is essential.**

Given how important the voice of the business community was in the Jobs Bill, many of those interviewed saw increasing the engagement of the business community to be a significant challenge and a significant opportunity. They believed that future investment and change within the system would depend upon having the business community champion these investments and changes.

➔ **Creating a sustainable funding stream for the WCTF should remain a priority.**

While getting \$5 million in funding for WCTF was deemed a success, very few were fully satisfied with the results. There was not a huge appetite for repeating this fight on an annual basis. In short, the effort to create a more sustainable stream of funding for the WCTF remains an important priority for many of those involved in the last legislative session.

CONCLUSIONS

SkillWorks and WSG have been working for many years to increase awareness of the workforce challenges in the Commonwealth and to advocate for state policies to address these challenges. In their advocacy work around middle-skill jobs, they have conformed to a general policy advocacy playbook that consists of:

- framing the problem: issuing the *Massachusetts' Forgotten Middle-Skill Jobs* Report and disseminating the findings through the media and other events;
- outlining solutions: authoring the Middle Skills Solutions Act and promoting sustainable funding of the WCTF;
- mobilizing a constituency: running regional forums and meetings and developing a targeted communication strategy;
- cultivating champions: identifying potential leaders and organizing effective meetings to generate interest and ownership; and
- climbing on every moving train at the State House: remaining flexible and opportunistic in response to changing events.

Interviews with those who were making the critical decisions in the administration and in the legislature revealed that no one factor or tactic accounted for the successful re-funding of the WCTF or the other workforce system improvements that occurred in the legislative session.

As WSG's director stated in reflecting on the session, "the challenge with legislative work is that you never know which factors have the greatest impact. But, in order to be effective, you have to try all of them. You also have to be willing and able to work behind the scenes negotiating on key elements of your agenda and strategically targeting critical leadership. And, you have to look at the broader context of what the major issues are during a given legislative session and make the connections to your issue."

This general playbook proved effective in the very difficult political and economic environment during the 2012 legislative session.

At the same time, even the best laid plans often do not lead to successful outcomes. There are many exogenous factors at play in any advocacy effort. In the case of the workforce-related advocacy during the 2012 legislative session, one could say that there was a "perfect storm" of factors leading to some of the successes.

Most importantly, the timing was right in terms of the issues being addressed and the interests of the administration and the legislature. Given the economy, job-related issues were a very high priority. The concerns of business were particularly compelling and the idea that jobs were going unfilled, while unemployment was so high, was a highly motivating factor for many legislators.

In addition, one of the primary parts of the agenda—the funding of the WCTF—involved investing in a known entity. The operating history, the ability to provide evidence of the past activities and outcomes of the WCTF was very important. In the challenging fiscal climate that prevailed during the 2011-12 session, it would have been much more difficult to get this level of funding for a new, innovative workforce program. The risks might have been perceived as too high.

In terms of learning for policy initiatives going forward, the interviews revealed:

1. *It takes time to create new frames and language around a policy issue.* The research and policy work related to the Skills2Compete campaign provided a strong foundation that, while it took time to build, created a new language for talking about the workforce development challenges in the state.
2. *Nurturing strong relationships with a couple of very important legislators has large returns.* In the end, it was the championing of the issue by key House and Senate leaders that was probably the most critical factor in seeing the process through from the beginning to the eventual inclusion of the funding within the Jobs Bill.
3. *Being persistent, but remaining flexible, is critical during the legislative process.* Over the past two years, WSG and SkillWorks have been on message and have looked at every opportunity to make linkages between the workforce challenges in Massachusetts and other key issues, but they were never rigid in terms of their solutions. Rather than drawing

a line in the sand, WSG and SkillWorks were able to adapt quickly when there was pushback.

4. *The focus should be on success, not getting credit.* Many of the events that occurred during the session happened behind the scenes. As a result, those involved often did not attribute some of what happened to WSG or to SkillWorks. And, while legislators and their staff sometimes mentioned individual members of WSG as playing a key role, their affiliation with WSG was not entirely clear. In the end, the members of WSG and SkillWorks did not focus on who got credit for the success. They viewed it as a collaborative effort. And, by not focusing on recognition, they were better able to achieve their goals.
5. *Real stories from businesses and residents within a legislator's district are very influential.* While reports and data are important in terms of framing an issue, when it gets down to the vote, hearing directly from constituents is more effective in terms of influencing the priority that a legislator places on this issue and his eventual vote.
6. *Finally, some of the most important longer-term system changes might not be tied directly to funding or even be part of the initial agenda.* While there has been a lot of attention to the successful funding of the WCTF and some of the other elements of the Middle Skills Solutions Act, in the long run, it might be the influence that the WSG/SkillWorks team had on the Community College Workforce Development Grant Fund that has the greatest impact on sustainable system change. The language in this outside section of the fiscal year 2013 state budget not only will provide \$12 million a year to address the state's skills gaps, but also involves the community colleges in new partnerships with other regional stakeholders and involves members of WSG as part of the Advisory Board to the Board of Higher Education that will be overseeing these grants. In both ways, new relationships and changing perspectives can develop that have long-term system change implications.

Appendix A: Interview List

Micaelah Morrill	Chief of Staff, Office of State Senator Dan Wolf - Cape & Islands
Senator Kenneth Donnelly	4th Middlesex district
Cindy Friedman	Chief of Staff
Senator Dan Wolf	Cape & Islands
Tom Moreau	Massachusetts Department of Education, formerly of Speaker DeLeo's Office
Marybeth Campbell	Director of Education and Workforce Development
Arianna Kelly	Former Policy Advisor to Senate President Therese Murray
Bob Ross, Lisa Gentile	Fiscal Director, Office of Senate President Therese Murray; Policy Advisor and Senior Counsel, Office of Senate President Therese Murray
Doug Howgate	Budget Director, Senate Ways and Means Committee
Jennifer Saubermann	Treasurer, Senate Ways and Means Committee
Senator Sonia Chang-Diaz, Nathanael Shea	2 nd Suffolk District, Legislative Aide to Senator Chang-Diaz
Senator Karen Spilka	2nd Middlesex & Norfolk district
Representative Sean Garballey	23 rd Middlesex District
Senator Gale Candaras	1 st Hampden and Hampshire District
Representative Joseph Wagner	8 th Hampden District, Chairman, Joint Committee on Economic Development and Emerging Technology
Yashira Pepin	Acting Chief of Staff at Executive Office of Labor and Workforce Development
Lew Finfer	Director, Massachusetts Communities Action Network
Chris Kealey	Deputy Director at the Massachusetts Business Roundtable
Nancy Snyder	President and CEO, Commonwealth Corporation

Appendix B: Draft Questions for Public Policy Evaluation

Introduction: The Workforce Solutions Group is a statewide advocacy coalition led by the Mass AFL-CIO, Massachusetts Business Roundtable, SkillWorks, Crittenton Women’s Union, the Massachusetts Workforce Board Association, Massachusetts Communities Action Network led by Lew Finfer, the Massachusetts Workforce Professionals Association, and the Center for Labor Market Studies at Northeastern University. I’d like to ask you a few questions about your experience working with the Workforce Solutions Group, often known as “WSG.”

1. How has your understanding of the workforce challenges in the Commonwealth changed in the last few years and what has influenced your views?

PROBE ON:

- WSG
- SkillWorks
- Massachusetts’ Forgotten Middle-Skill Jobs report (or Skills2Compete report)
- Boston Federal Reserve Bank report on the Skills Gap
- Other

2. When considering workforce development legislation or policy/budget decisions who are the credible third parties you look to?

PROBE ON:

- WSG
- SkillWorks
- Other important voices

3. What separates WSG from other influencers on workforce development issues?

- Does the fact that WSG has business, labor, and community groups involved affect your opinion about WSG and if so, how?
- If WSG had a singular geographic focus such as greater Boston or Western MA would that affect its impact?

4. Looking at the recent legislative session:

- How did WSG affect this year’s legislative session and budget deliberations?
- What was the most important message that resonated with legislators related to skill training and workforce development?
- What were the major factors leading to successful funding of the WCTF?

5. What forms of contact from WSG and SkillWorks were most helpful and/or influential?

- Meetings with constituents active with WSG
- Meetings with WSG representatives
- Briefings with other legislators
- Electronic newsletters
- Phone calls
- Emails & letters
- Newspaper op eds and letters
- Research reports

6. Do you have any other suggestions or feedback for WSG?

- What in your mind are still the highest priority or gaps that need to be addressed in terms of addressing the state's skills gap and/or getting people back to work (or use alternate phrasing year—just thought the question needed to be more specific)