

ATTACHMENT E

PROTOCOL—LOCAL WORKFORCE BOARD/EMPLOYER CONSORTIUM/LOCAL ECONOMIC DEVELOPMENT AGENCY

Site Visit Information

Cluster name:

Cluster ID:

Date of site visit:

Site visit round:

Site visit team:

Instructions for the Site Visit Team

This protocol assumes that the respondent has been affiliated with the cluster and is knowledgeable about its operations. If that is not the case, adapt the protocol as follows: (1) ask if the respondent is familiar with the topic in bold, (2) adapt the question to ask about respondent perceptions on the topic, and (3) limit yourself to questions that are underlined and skip the remainder.

Respondent Information

- **Respondent name and title:**
- **Respondent affiliation:**
- **Respondent contact info:**
- **Respondent background.** What is your professional background (for example, training, experience)?
- **Respondent involvement in cluster.** Have you been involved in this cluster? If so, for how long? What are your responsibilities related to the cluster? What are your responsibilities related to the JIAC grant?

Cluster Background and Goals

1. Can you briefly describe the local economic context in this region?

Economic context. What is the local economic context? What are the major industries? Are there any emerging industries? Declining industries?

Effect on cluster formation. In what ways has the local economic environment influenced the formation of the cluster participating in the JIAC grant? In what ways has it influenced the goals of the cluster?

2. What is this cluster's prior history of collaboration for economic development?

Cluster history. How was the cluster created? Which organizations played a role? Was your organization involved in its creation? What were your contributions? Which other organizations played a role? Did you receive any federal funding as part of that effort? Were you involved in subsequent cluster activities? What role did you play?

Overall cluster goals. What are the primary goals of this cluster? Have these changed over time?

Cluster goals related to grant. Why did the cluster decide to apply for the JIAC/AM-JIAC grant? What does the cluster hope to achieve? Was there a particular person or organization that was an advocate for grant participation?

Cluster Partnerships and Operations

3. What is your role in the cluster?

Role. Does your organization play a role in (a) grant development, (b) grant planning, or (c) grant implementation? If so, what role? Would you like to have played a different role (smaller, larger, focused on different activities, or involved at an earlier or later stage)? With which cluster partners do you work most closely in conducting these activities?

Decision making. Does your organization play a role in or contribute to cluster decision making?

4. How inclusive and cohesive is the cluster?

Gaps in cluster participation. Are there any organizations that should be involved in the cluster (but aren't)?

Assessment of communication. Have the cluster's communication strategies been effective? Do you feel that your organization has access to relevant information in a timely fashion? Are there any changes needed to how communication is organized in the cluster? If so, why? What factors have facilitated and/or impeded effective communication?

Degree and determinants support. Do cluster partners share consensus on and support the cluster's (a) purpose, (b) strategy, and (c) activities? Why or why not?

Grant Funding

5. Was funding for grant activities sufficient? Was it structured effectively?

Sufficiency of grant funding. Is the funding provided under the grant sufficient?

Grantee perceptions of pooled funding. What are the benefits of receiving this pool of money as a bundled grant rather than three separate grants? What are the challenges?

Grant Activities and Outcomes

6. Is the cluster making effective use of the JIAC grant?

Appropriateness of activity selection. Is the grant focusing on the correct activities to promote job growth in the target industry within the region? Why or why not? Are there any other activities that should have been conducted under the grant?

Cluster progress. Are grant activities effective in achieving desired outcomes?

Beneficiaries served and inclusion. Do you think cluster grantees are targeting the right beneficiaries for its activities [PROBE SPECIFICALLY FOR ETA ACTIVITIES]? Why or why not? If not, what other groups do you feel the cluster should be targeting? Why? Are you aware of grant activities to promote inclusion of historically underrepresented and excluded groups? How successful are these activities?

Determinants of progress. What has helped or impeded achievement of desired outputs and outcomes?

Program Management and Sustainability

7. How agile is the cluster in implementing grant activities?

Ability to make midstream adjustments. To what degree has the cluster been able to make adjustments to respond to changing circumstances or unforeseen challenges? (For example, were there any instances where a cluster partner withdrew from the partnership, or where a planned activity was no longer feasible? What did the cluster do in such circumstances?)

Determinants of adaptability. What factors have helped the cluster in adapting to changing circumstances? What factors have impeded adaptation?

8. What plans has the cluster created to promote sustainability?

Formal plans for sustainability. Has the cluster created any formal plans to promote sustainability? If yes, for which cluster activities has this sustainability planning been conducted [PROBE SPECIFICALLY FOR ETA ACTIVITIES IF NOT MENTIONED]? How were these plans created? Who led the effort? What do these include? How far along is this planning (initial stages, advanced stages)?

Factors facilitating/impeding planning for sustainability. What factors facilitated planning? If no planning has been conducted, why not? What factors are impeding such planning?

Program Replicability and Lessons Learned

9. How replicable are grant activities, and what are the lessons learned?

Replicability. Can the activities conducted under the grant be replicated? If not, why not?

Facilitating factors. What factors facilitated grant implementation? What are the greatest strengths of the cluster? What do you believe are your greatest successes?

Impeding factors. What factors impeded grant implementation? What are the limitations of the cluster? What have been your greatest challenges?

Lessons learned. What three things would you change about how the cluster implemented grant activities?