



January 29, 2020 - 8:30 a.m.
13805 58th Street North, Clearwater, FL, 33760

Strategic Planning Team

Agenda

- I. **Welcome**.....Jennifer Brackney, CEO
- II. **Information/Discussion Items**
 - 1. Summary—Strategic Planning Team Meeting January 17, 2020..... Page 2
 - 2. Strategic Planning Process Page 5
- III. **Other Administrative Matters**
(Items of urgency not meeting the seven-day guideline for review)
- IV. **Public Comments**
- V. **Open Discussion**
- VI. **Adjournment**

Next Strategic Planning Team Meeting- February 7, 2020





Information Item 1

Summary of Strategic Planning Team Meeting

The draft summary from the January 17, 2020 meeting of the Strategic Planning Team has been prepared and is attached.

CareerSource Pinellas Strategic Planning Team Meeting Summary

Date: January 17, 2020 - 9:00 A.M.

Location: 13805 58th Street North, Clearwater, 33760

Welcome

Jennifer Brackney started the meeting at 9:05 a.m. with a welcome and introduction to the Strategic Planning Facilitator, Lori Strumpf, from Strumpf Associates.

Board Members in Attendance

Jody Armstrong, Barclay Harless, Mark Hunt, Michael Jalazo, Michael Logal, Michael Meidel, Rebecca Sarlo, Amy Van Ness, Scott Wagman, Zachary White

Partners in Attendance

Emery Ivery, Chris Moore, Michael Ramsey,

Staff Present

Jennifer Brackney, René Davisson, Michelle Moeller, Mary jo Schmick, April Torregiante, Steven Meier

Strategic Planning Process

Lori Strumpf presented her credentials and provided an overview of the Team's charter and reviewed the process ahead. Focus on strategic thinking for the organization to thrive, not just survive. Established the goal for the day was not to solve problems or address the "known knowns", rather use the brain trust in the room to focus up and share ideas to create and build a plan.

Planned Outcome: Create a new strategic plan for the period July 2020 through June 2023 as a recommendation to the Workforce Development Board (WDB). This plan will provide the framework for developing a business plan.

Introduction to Participants

All participants introduced themselves, indicated the affiliation and role with CareerSource Pinellas and provided the timeframe for that affiliation.

Activity Item 1

René Davisson reviewed the material in the binders provided to each team member.

Lori Strumpf initiated a discussion on the demographics and Labor Market summary section. Asked each participant what struck them about the data. Lead to significant discussion on interpretation of the stats and the correlation with the impact/services of CareerSource.

Activity Item 2

Three small groups identified, intermixing Board and staff. Assignment--discuss:

- What are the **strategic** challenges the organization will face over the next 3 years with regard to working towards the goals?

Strategic challenges were defined as those influences that will have a **decisive influence** over the organization's likelihood of success.

Each table presented their top 3 and Lori facilitated questions/input from other tables. The information was then compiled and included:

Emerging Strategic Challenges

- *Improving communication about services to job seekers and employers including rebranding and building trust
- Serving jobseekers with multiple barriers
 - Individuals who are unemployed may need more intensive services
 - Providing resources/partnerships to help address
- Aligning the outcome of jobseeker services to meet employer needs
 - Ensuring that services designed to develop jobseeker skills are will be needed
- Establish workforce leadership
 - Bringing together all the 'like agencies/mission focused'
- Talent supply management
 - How to build the workforce that is here instead of companies bringing people in
 - What does it look like to build career pathways
 - How to know what the current and future needs are/will be
- Enhanced employer relationships to benefit employees
- Funding
- Technology
 - Maximizing use in delivery of services
 - Maximizing use in more efficient operations
 - How technology is changing the workplace/training needed for jobseekers/labor market intelligence to understand key occupations and jobs that will be impacted
- Leadership and Board Development for CareerSource Pinellas
- *On demand mindset of employers and job seekers
 - Want solutions/training/certifications right now

Activity Item 3

Using the compiled information on the key challenges identified, broke into 2-person teams based on individuals working on the challenges they were most interested in. The small groups continued with compiling a SWOT analysis specific to the topic. Two of the challenges* were not worked on during the meeting—they will be completed at the next scheduled meeting. SWOT attached.

Closing Discussion

Facilitator Lori Strumpf did a round table of feedback of the day and thoughts as the first meeting was concluding.

Adjournment

The Strategic Planning Team meeting concluded at approximately 1:50 pm.

NEXT MEETING: January 29, 2020 at 8:30 a.m.

Discussion Item 2

Strategic Planning Process

Review of the SWOT Analysis Handout and identification of priority areas.

Using the SWOT Analysis Handout in conjunction with Labor Market data, begin to address the following questions:

- What should we accomplish (results/outcomes) over the next 3 years?
- What should we do (activities) over the next 3 years?
- How do we excel (catalyze even higher performance) over the next 3 years?



SWOT Analysis Handout

<i>Organizational Challenges (Data Based)</i>	<i>Organizational Strengths (to meeting the challenge)</i>	<i>Organizational Weaknesses (that create a barrier to addressing the challenge)</i>	<i>Opportunities (in addressing the challenge)</i>	<i>Threats (posed to the organization if the challenge is not addressed)</i>
1. TECHNOLOGY (Renee and Michael)	New leadership team committed to moving organization forward	Lack of internal expertise in the IT area	Define the best and the brightest to have a conversation (Chief Learning Officer)	Will not keep up with needs of job seekers and employees
	Facilities are in good geographical locations	Full understanding of needs	Expand focus for discovery	Productivity loss
	Good partners	Funding for upgrades and expansion	Short term funding options for technology acquisition	Not spending \$\$ wisely
		Procedures for approvals, cyber protection – no internal Safety Officer	Board liaison expansion to create an expert in technology	Not having expertise
			Adopt what is working in other CareerSource locations in Florida as well as government technology options	
2. Aligning the outcome of jobseeker services to meet employer needs <ul style="list-style-type: none"> • Ensuring that services designed to develop jobseeker skills are/or will be needed (Mark and Michael)	Self-evaluation, ability to identify and adapt Employer engagement; leaderships ability to connect with employers	Departmental silos Ineffective connection between employers and educational providers	Cross training of staff Develop connection process	Resistance to change Lack of employer engagement
3. Funding (Amy, Steve, Emory)	Partnerships for grant funding opportunities Strong job market	Funding formula Dependent on federal funding, lack of diversification Lack of resources to mine for other grants and opportunities	Diversification Provide partnerships for funds Partnerships with other non-profits Regional collaboration	Federal funding cuts (e.g. SNAP, etc.) Prioritization Strong job market Competition for funds and grants

SWOT Analysis Handout

			Build fundraising team, set goals for resources	Validity (?) of funding Change in legislation
<p>4. Serving jobseekers with multiple barriers</p> <ul style="list-style-type: none"> Individuals who are unemployed may need more intensive services Providing resources/partnerships to help address <p>(Jody and Rebecca)</p>	<p>Established one stop centers</p> <p>Established partnerships with some community/social service providers</p> <p>CareerSource staff are strong advocates and out processes are established</p> <p>Staff/board is data literate and values this information</p>	<p>Lack of a systematic way to identify barriers and the individual and aggregate levels</p> <p>Need to identify and organize community providers (e.g., resource map)</p> <p>Lack of systematic way to connect jobseekers to community resources</p> <p>Lack of process/data to educate impact of allocated resources for jobseekers</p>	<p>Expand outreach to jobseekers by going into their community/neighborhoods, consider non-traditional settings</p> <p>Identify assessment protocols to identify needs</p> <p>Establish a community resource map to understand and communicate resources</p> <p>Establish and agile response process to identify new/continued issues and potential resources</p>	<p>Fail to attract or access jobseekers</p> <p>Continue to work in silos and duplicate efforts</p> <p>Potential apathy of board/staff related to blaming jobseekers for not accessing resources (e.g., make assumptions)</p> <p>Less able to know when we are achieving or goals and why or why not</p>
<p>5. Establish workforce leadership</p> <ul style="list-style-type: none"> Bringing together all the like minded and mission focused agencies <p>(Jennifer and Barclay)</p>	<p>Board and leadership relationships</p> <p>Willingness to engage</p> <p>Know-how</p>	<p>Staffing capacity</p> <p>External involvement</p> <p>Future leadership</p>	<p>February workgroup</p> <p>Listening tour</p>	<p>External perceived image</p>
<p>6. Leadership and board development</p> <ul style="list-style-type: none"> Educating board to responsibilities and powers Securing enough business members Developing a clear succession plan for management 	<p>Newish board open to education and guidance</p> <p>Good connection to Chamber</p> <p>Ok for now with strong CEO/CFO</p> <p>Adequate for today with</p>	<p>Board doesn't understand fully the primary role of selecting and supporting CEO</p> <p>Need to make business community aware of board opportunities</p> <p>Some top manager retirements need to be covered; need a clear #2</p>	<p>Need a trainer to lecture the board and then(?)</p> <p>Speak to Chamber and news media</p> <p>Identify the next in house leader, if they exist</p>	<p>Risk of poor CEO performance not being corrected(?)</p> <p>Violation of charter and bylaws. Lack of business input</p> <p>Emergency loss of the person causing continued problems (???)</p>

SWOT Analysis Handout

<ul style="list-style-type: none"> Developing strong department leaders (Scot) 	<p>some strong long-term managers</p>	<p>Unclear about identifying potential leaders and how they are groomed</p>	<p>Identify and train</p>	<p>Employee morale loss. Loss of good people. Loss of organizational performance</p>
<p>7. Enhanced employer relationships to benefit employees (Mike M and Michelle)</p>	<p>Knowledge expanded staff to meet 30% of time with employers</p>	<p>Understaffed Low numbers of jobseekers Lack of time for face to face, personal touch with employers</p>	<p>Employer need is high - they are motivated Referrals from successful firms Acct executive ability to post job order immediately</p>	<p>No placement Reduced funding Poor performance</p>
<p>8. Talent supply management</p> <ul style="list-style-type: none"> 2.7% unemployment legislative limits too many players in WFD vying for the same people interpreting all the data available <p>(Chris and Mary)</p>	<p>Strong partnerships Strong board Partnerships and leadership Good leadership and direction; this strategic process</p>	<p>Hard to accomplish great things when in reputation recovery Capacity and planning around too many players Staff and organizational capacity</p>	<p>Start young, partner with education Leverage partnerships and be the leader Focus on building strong relationships with employers and industry Start educating about workforce and careers early and often Be the leader and convener of the discussions</p>	<p>Relevancy as an organization Prior reputation Potential loss of funds Preconceived ideas about education or career pathways (e.g., don't need 4-year degree for all) Trying to be all things to all people.</p>