



February 7, 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 29, 2020..... Page 2
 - 2. Draft: Strategic Action Plan July 2020 through June 2023 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 25, 2020





Information Item 1

Summary of Strategic Planning Team Meeting

The draft summary from the January 29, 2020 meeting of the Strategic Planning Team has been prepared and is attached.

CareerSource Pinellas Strategic Planning Team Meeting Summary

Date: January 29, 2020 - 8:30 A.M.

Location: 13805 58th Street North, Clearwater, 33760

Welcome

Jennifer Brackney officially started the meeting at 8:40 a.m. with a welcome and turned the meeting over to the Strategic Planning Facilitator, Lori Strumpf, from Strumpf Associates.

Board Members in Attendance

Jody Armstrong, Barclay Harless (absent), John Howell, Mark Hunt, Michael Jalazo, Michael Logal, Michael Meidel, Rebecca Sarlo, Amy Van Ness (absent), 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 kicked off the meeting sharing a summary of the Focus Group results from January 17, 2020. Participants were asked to review the results.

Activity Item 1

Lori Strumpf initiated a discussion on the Summary Findings of challenges the participants of the Focus Group face as a business/employer. Of particular note:

- Challenges with lack of applicants and finding qualified ones
- Percentage of qualified applications that do not pass the drug test
- Employer expectations
- Investment in training only to have people leave

Activity Item 2

Breakdown of SWOT Analysis for the question:

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

Lori Strumpf provided a compilation of the SWOT Analysis information gathered at the January 17 session and participants were asked to identify what they felt were the top 3 Threats and Opportunities. There was a round table review of answers, followed by discussion.

Activity Item 3

During break, Lori Strumpf took the items identified in Activity Item 2 and grouped into three main categories:

- 1) Change Management / Building Organizational Capacity. This category encompassed:
 - a. Staff capacity
 - b. Resistance to change
 - c. Technology
 - d. Diversification of resources
 - e. Reputation / relevancy
- 2) Engage Employers / Build Relationships
- 3) Expand Outreach / Non-Traditional Settings

Lori Strumpf encouraged discussion, ideas, input on each of these areas. Following is a sampling of key points made under each category.

Change Management / Building Organizational Capacity

Staff capacity

- Do we have the capacity to handle—need more than 2 business account executives
- Need a combination of strategies
- How do we make employers feel like a partner
- Review of processes and changing to meet needs
- Strong marketing—who is our target
- Concerns on need for shift of staff and disruption

Resistance to change

Technology

Diversification of resources

Reputation / relevancy

- Share success stories and stats—tell our story better
- Need a new story to replace the old narrative
- Maximize relationships—Chamber, Workforce, Partnerships
- Services offered outside of pure employment
- Connecting large groups of people (example Professional Networking Group)
- Under promise and over deliver

Engage Employers / Build Relationships

- Shift to skill-based process and real time labor market info
- Employers unaware of what we have available i.e. options like WIOA
- Define mutually the relationship with the employer
- Value and feasibility of one-on-one employer meetings
- Employer reluctance to provide step-up opportunities for their employees
- Career mapping
- Need clear understanding of career pathways

Expand Outreach / Non-Traditional Settings

- Identifying affiliate sites; library, churches, food banks, homeless shelters
- Take resources into community
- Identifying limitations: transportation, child care
- Utilize technology to reach a broader audience
- Marketing continuity and consistency to break barriers and build trust
- Non-traditional approach to providing creative options (van pools, ride shares, employer child care)
- Community asset mapping
- Target outreach to avoid being all things to all people
- Building and strengthening education outreach
- Disabilities sector still highly unemployed, not unemployable

Activity Item 4

Question: Who is the customer of CareerSource Pinellas? Lori Strumpf initiated a round table discussion on this question.

Closing Discussion

Facilitator Lori Strumpf summarized how this session was defining our “emerging” goals. The creation of our Strategic Plan will become the new narrative for CareerSource Pinellas.

Adjournment

The Strategic Planning Team meeting concluded at approximately 12:15 p.m.

NEXT MEETING: February 7, 2020 at 8:30 a.m.



Discussion Item 2

Strategic Action Plan July 2020 through June 2023

Review and discussion of the initial draft of the Strategic Action Plan incorporating the information Strumpf Associates gathered in Strategic Planning Team Meetings #1 and #2, as well as Focus Groups held to date.

Assignment to the Strategic Planning Team:

Following is the first draft of our emerging strategy. Please review the conversations from the last meeting outlined on pages 8-9. This information defines the emerging goals and strategies.

ACTIVITY

Continue the Strategic Planning process as facilitated by Strumpf Associates.

***STRATEGIC ACTION PLAN
JULY 2020 THROUGH JUNE 2023***

***DRAFT
For REVIEW
By the Strategic Planning Committee
February 3, 2020***

Developed by the Workforce Development Board (WDB)
Strategic Planning Committee

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 Vision, Mission, Values, Customers

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Planning Team Members

[list]

Lori Strumpf, Facilitator
Strumpf Associates: Center for Strategic Change

INTRODUCTION

This document is the dynamic blueprint for the sustainability and growth of the region’s talent pipeline. It is the product of intensive discussions by the Workforce Development Board’s (WDB), Strategic Planning Committee members and feedback from staff, partners, and stakeholders. This plan lays the foundation for the organization’s business plan, which will outline key actions and resources required to execute the objectives and strategies found in this plan.

The Planning Committee is to be commended for their imagination, dedication, and perseverance throughout this process. We have a vision of where we want to be, an assessment of where we are now and a set of criteria to measure our progress. We have defined the values that describe how we do business and developed strategies and priorities to move us from where we are to where we want to be.

The strategic direction, goals and strategies included in this plan are a response to our understanding of what our customers value most about the workforce system and current opportunities and challenges for offering a high-quality system of talent development to the area’s businesses.

During the three-year period of this strategic plan we will[more to come based on goals and strategies identified]

In Pinellas County, as in the nation, there is an ongoing and growing scarcity of skilled workers to meet the demand. In Pinellas County, the number of job openings in 2019 was XXX. Employers continue to report consistent difficulty in filling their job openings.

This Strategic Plan brings together priorities covering all workforce programs within the WDB’s purview. Its priorities and objectives encompass all the WDB’s activities. However, a plan is of little value by itself. This document is the framework to continue our growth and ensure the sustainability of our high-performance, customer-focused workforce development system that continues to benefit all stakeholders – our customers, our employees, and the community.

The demand is great, as is our commitment to build a workforce strategy for our time that can meet the needs of today’s changing business environment.

DATA SNAPSHOTS [To Come]

Sources:

General Population

Income, Poverty and the Economy

ORGANIZATIONAL OVERVIEW VISION, MISSION AND VALUES

VISION:

MISSION:

**VALUE
PROPOSITION:**

TAG LINE: (Create a tag line that appeals to businesses)

CUSTOMERS: Our primary *external customers* are jobseekers (emerging, transitioning and incumbent) and businesses.

Our primary *internal customer* is our **?**.

ROLE: The WDB will play several roles in furtherance of our vision and mission: **[I have developed these based on the last meetings conversations]**

- We **act as a convener** of business and industry on behalf of the workforce system.
- We seek to **catalyze change** in the community to build effective partnerships.
- We will **strategically invest** in program innovation.

ORGANIZATIONAL CORE VALUES

Our Common Values:

We believe in the following shared principles, beliefs and priorities....

[To Come]

STRATEGIC PRIORITIES, GOALS AND OBJECTIVES

Strategic Priority: *[possibility to create one or two overarching priorities from the goals]*

Goal 1: Develop Robust Partnerships with Employers

Outcomes by 2023: *(as example)*

- Increase the number of businesses providing workbased learning opportunities by X%.
- Increase the number of businesses using the system for recruitment by X%.
- Increase the number of businesses participating on advisory boards, curriculum development committees, etc. by X% system wide.

Key Strategies:

- 1.1. Convene employers regularly to understand immediate and future needs and/or partner with Tampa Bay Partnership in this endeavor.
- 1.2 Develop and execute a marketing strategy to build awareness with businesses about how to engage and the services available.
- 1.3 Increase services to incumbent workers.
- 1.4 Develop methods that help businesses navigate the workforce system's services and that connect them with qualified applicants
- 1.5 Partner with employers to engage in barrier reduction of those applicants/workers who are work ready and need help with transportation, continuing education, childcare, etc.
- 1.6 Inventory best and promising practice approaches for working with and engaging businesses and scale up.

Goal 2: Strengthen Partnerships with Organizations that Provide Educational Opportunities

Outcomes by 2023

- ????

Key Strategies:

- 2.1 Convene all the groups that produce Labor Market Information (LMI) data and information to work together to create *LMI Briefs* that can be used by jobseekers, employers, and other workforce organizations in easy to consume formats.
- 2.2 Convene employers to identify skill needs and align education providers' offerings to current and future skill needs.
- 2.3 Provide easy to use 'career maps' for jobseekers to use to both know where to go for education/training to obtain necessary credentials and next steps on a career path.
- 2.4 Ensure that there is a Talent Pipeline 'through put' that connects business service staff between CareerSource and educational institutions.

Goal 3: Expand Outreach to Jobseekers

Outcomes by 2023:

- Customer satisfaction increases by X%.

□ ????

Key Strategies:

- 3.1 Target outreach efforts based on ?? (demographics, pockets of poverty, areas of opportunity?)
- 3.2 Expand the satellite system currently in place.
- 3.3. Conduct asset mapping at the ground level to identify local community based organizations and resource assets that might assist with outreach and service delivery.
- 3.4 Expand connections to the priority populations (e.g., underemployed) through the library system, faith-based organizations, community-based organizations, and other places where individuals not normally served by the workforce system feel welcome.
- 3.5 Conduct a gap analysis through engagement with priority customers and key stakeholders to assess what services may be missing and/or what changes are needed in how services are delivered to ensure participation.
- 3.6. Support individuals to gain employment through a system of wrap around services that is responsive to their diverse experience and needs.

Goal 4. Build Organizational Capacity, Promote Change and Transformation of CareerSource

Outcomes by 2023:

????

Key Strategies:

- 4.1 Present a positive message of the organization to include all that is currently being done and what will be done based on the strategic plan.
- 4.2 Create talking points for use by board members and staff as part of the awareness campaign (see 1.2).
- 4.3 Continue to build services that are relevant to employers and jobseekers.
- 4.4 Build a reputation as the ‘go to’ place for employers.
- 4.5 Continue to improve and enhance the technology infrastructure both internally for staff to be more efficient and for communication among the system’s partners and to increase user friendly access for customers.
- 4.6 Ensure compliance and work with/train staff on the new ways of doing business that are in compliance while reducing the burden on customers through streamlined compliant processes.
- 4.7 Develop methods to regularly listen to customers to test new processes before implementing them permanently.

OPERATING PRINCIPLES [I have developed these based on the conversations you have had to date in the meetings, what has come out in focus groups, and conversations with Jennifer about the organization you are becoming]

The following principles define the way the organization operates with regard to the goals and strategies identified. The core processes employed by the organization to accomplish the goals will operate in the following fashion.

- We operate as a learning organization that is innovative, flexible, and timely in our service delivery.
- We are anticipatory of external developments that may have an impact on the organization.
- We challenge each other to achieve excellence.
- We hold ourselves accountable to each other and our customers.
- We collaborate with our partners and build strategic alliances around our goals, strategies and tasks in which we are engaged.
- We implement, measure, evaluate and continuously improve all our programs, services and operations based on data analytics and our values.
- We continuously strengthen organizational effectiveness and build capacity.

MEASURING RESULTS:

Overall Measure by 2023 as a result of the strategies put in place:

[To Come]