



# **Strategy Council**

## **Meeting Materials**

**August 12, 2009**



*August 12, 2009*  
8:30 a.m. – 12:00 p.m. EDT  
Ballroom  
The DoubleTree Hotel  
101 South Adams Street  
Tallahassee, Florida  
[www.workforceflorida.com](http://www.workforceflorida.com)  
Agenda Packet  
Posted on Website

## STRATEGY COUNCIL MEETING

### A G E N D A

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- A. Welcome and Introductions .....David Armstrong, SC Chair**
  
- B. Action Item ..... Chris Hart**
  - 1. Labor Market Data Capture & Surveys**
  
- C. Strategy Council Formative Session**
  - 1. Welcome, Call-to-Action and Board Role on August 13.....David Armstrong**
  - 2. Draft Milestone Timeline and Preparation for  
Extended Meeting .....Don Upton, President – Fairfield Index, Inc.**
  
- D. Strategy Council Extended Session**
  - 1. Draft Statement of Intent ..... Upton + Team**
  - 2. Guiding Principles..... Upton + Team**
  - 3. Approaches to Team Engagement/Subject Matter/Staging..... Upton + Team**
  - 4. President’s Perspectives ..... Chris Hart**
  - 5. Next Steps.....David Armstrong**
  
- E. Final Comments/Adjourn .....David Armstrong**

# Action Item 1

## LABOR MARKET DATA CAPTURE & SURVEYS

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Workforce Florida's Executive Committee on May 14, 2009, allocated up to \$2 million in federal funding—\$1.4 million in Workforce Investment Act and \$600,000 in Wagner-Peyser 7(b) Re-Employment Services stimulus funds—to be directed, through the Strategy Council, to data capture and labor market surveys. The goal of this investment is to support reemployment services for Unemployment Compensation claimants and enhance the availability and use of labor market data to boost workforce system efforts aimed at getting unemployed Floridians back to work. Such information is critical in identifying economic sectors and businesses that presently need skilled workers or will need additional workers as the economy recovers from the current recession. This data also will be instrumental to ongoing efforts to transform the Florida economy into one that is more diverse and globally competitive through a highly skilled workforce. Such data capture/analysis and surveys also are consistent with U.S. Department of Labor recommendations to states to direct some of its stimulus funding to enhance labor market information.

Based on an assessment of statewide and regional needs for additional workforce and economic data, the following software tools and studies have been identified for funding and are listed in priority order:

**Help Wanted On-Line (\$244,000)** — The Conference Board's Help-Wanted Online Data Series (HWOL) is a monthly report that provides the workforce system with a reliable gauge of labor demand with job openings by local area. The data from the report will help guide training and reemployment resources toward demand occupations. HWOL measures the number of online job openings on Internet job boards. This data series ranks job openings and employers by level of demand for cities, counties, metro areas or workforce regions. Green jobs are highlighted using key-word search. Openings are compared to unemployment and employment levels. Comparative data are available nationwide and licenses for each Regional Workforce Board are included.

**TORQ (\$125,000)** — The Transferable Occupation Relation Quotient (TORQ) is a transferable skills analysis tool that provides transitioning job seekers with alternate career pathways. TORQ analyzes occupations at the skills level, providing job seekers with career transition information based on the requisite knowledge, skills and abilities of a large sampling of occupations. This tool enhances the capabilities of the O\*NET skills database allowing a faster response time from Labor Market Statistics to handle data requests concerning reemployment for the workforce regions.

**Green Jobs Survey (\$720,000)** — This survey will collect information on the current employment and hiring expectations of Florida businesses with green jobs and provide details on the skills requirements of this growing industry cluster. Job duties related to reducing energy usage, lowering carbon emissions and protecting Florida’s natural resources will be measured in the survey. This will provide a detailed assessment of occupations with green job duties and assist the workforce system in devising strategies for ensuring adequate training for this emerging sector. This survey will cover 60,000 employers with a probability sample and will be valid for each of the 24 workforce regions. It will be conducted by mail and telephone using Computer Assisted Telephone Inquiry. This will give Florida a baseline to produce future projections of green jobs in demand to support the needs of business. This survey also is consistent with Workforce Florida’s Recommendation No. 1 through its *Defining Green Jobs for Florida* report, which calls for estimating “current and future projections through special industry surveys and labor market statistics to better understand the magnitude of green jobs and guide workforce development investment and training activities.” Meanwhile, the Agency for Workforce Innovation also is submitting a proposal for a competitive grant for a green jobs survey with the U.S. Department of Labor, Employment and Training Administration.

**Job Vacancy/Hiring Needs Survey (\$710,000)** — This survey will collect information on current vacancies/hiring needs by industry and workforce region. It will cover 60,000 employers with a probability sample and will be valid for each of the 24 workforce regions. The survey will be conducted by telephone using Computer Assisted Telephone Inquiry and results will be provided six weeks after the start of each workforce region survey. This information will assist with reemployment analysis and job training needs. Other data elements collected will be length of the vacancy, full-time/part-time status and benefits offered. The Conference Board’s Help-Wanted Online data series can be considered a substitute for a vacancy/hiring needs survey. This survey will proceed if additional data are needed to complement statistics from HWOL.

Total set-aside for these four labor market information resources: **\$1,799,000**. However, should state-level stimulus funding not be needed for the Green Jobs Survey because Florida successfully receives a competitive grant award and the Job Vacancy/Hiring Needs Survey because HWOL satisfies the need for more real-time employment openings data, the funds set aside for these surveys will be directed to other priorities of the Strategy Council during the fiscal year 2009-2010.

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## **NEEDED ACTION**

**To approve the purchase of Help Wanted On-Line and TORQ software as well as to direct Workforce Florida staff to proceed, if needed, with commissioning the Florida Labor Market Statistics Center to conduct a Green Jobs Survey and Vacancy/Hiring Needs Survey financed with state-level stimulus funds.**

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## PROFILE

Don Upton  
President - Fairfield Index, Inc.

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Don Upton is the president of Fairfield Index, Inc., a company dedicated to helping communities, companies and non-profits become more competitive. Fairfield Index builds custom teams and approaches to meet client objectives in four practice areas: economic development and regional collaboration;

education reform and talent; integrated communications and public affairs; and marketing.

In periods of crisis – such as failure of products and services or the erosion of institutional reputation – Don plays a unique role in linking teams, leaders and systems in the rescue and recovery of value. He is both a communications professional and an attorney. His career includes: four decades of work in radio and television; public affairs and regulatory leadership in three Fortune 500 essential services (telecom and energy) corporations; and reputation management for large enterprises in the public and private sectors.

Don's clients have ranged from IBM to economic and business development organizations like The Broward Alliance, Enterprise Florida, and the Central Florida Partnership. As moderator, he has conducted strategic regional and state-level forums on workforce (Workforce Florida), economic strategy (Enterprise Florida) and innovation (Florida Chamber Foundation). He has worked with start-up companies and large performing arts organizations. His courses in brand, reputation and leadership are popular elements of executive programs and national association symposia. Fairfield Index's custom scorecards

for community development and site marketing have been unifying tools for a wide range of enterprises.

Don has been on-point for: Enterprise Florida's Rural Catalyst project, Enterprise Florida's target industry and site location project for Florida's 32-county Rural Areas of Critical Economic Concern (RACEC); and the firm's hot issues of innovation, rural development, affordable housing, and organizational transformation. Don and the Fairfield Index team have also been a voice for change and reinvention in the not-for-profit sector as structural changes in the economy, the pressures of community growth, and changing investor scorecards threaten traditional revenue streams. He

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*“Fairfield Index builds custom solutions for client needs in the areas of economic development, enterprise goals, public affairs, regional collaborations and reputation management.”*

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has transferred his enterprise goals process into county governments and cross-sector collaboratives.

Don is a graduate of the University of South Carolina, earned a JD from the University of South Carolina School of Law, and served in policy, community, and public affairs leadership roles in three Fortune 500 essential services corporations. He is a member of Leadership Florida Class XIV; and The

American Bar Association and its Forum on Affordable Housing & Community Development Law and Section of Public Utility, Communications & Transportation Law. He was presented with the Florida Chamber of Commerce's Chairman's Award in 2001 for his volunteer commitments to public policy research and education reform.

Fairfield Index is headquartered at Sabal Technology Park in Tampa.

## The Workforce Florida Board of Directors Statement of Intent

More and more, Florida will compete, grow business, innovate, and create individual, family, enterprise and community wealth through TALENT. Collaboration among all partners engaged in workforce delivery is essential if we are to understand and anticipate employers' needs.

It is the intent of Workforce Florida, Inc. to launch a strategic planning process through the coordination of its Strategy Council, the oversight of the Board of Directors, and the identification and publication of key milestones.

During a period of approximately 5 months, the Strategy Council will:

- ❖ Honor, assess, and carry through, as appropriate, the **values and principles of *Re-iMagine***, the 2005 - 2010 Strategic Plan
- ❖ **Reach out** to experts, leaders, partners, and enterprises with full Board support
- ❖ **Ask the tough questions**
- ❖ Consider and recommend the best **pathways toward raising the bar in performance** of the Florida Workforce delivery system
- ❖ Consider and recommend **the right targets to improve overall performance** for Workforce Florida
- ❖ **Ensure transparency** of calendars, milestones, and exploration
- ❖ Test, through partner outreach, approaches to the formation and engagement of a **Talent Supply Chain Team for Florida in 2010**
- ❖ Build and recommend a **Strategic Plan for Workforce Florida Board** consideration by mid-November 2009
- ❖ Work carefully with all key partners to ensure an aligned and action-provoking submission of ideas and input into the **State Strategic Plan** by December 31, 2009
- ❖ Identify early stage pilots, projects, and initiatives to **promote implementation and excellence**
- ❖ **Integrate the Strategic Plan**, as approved, as the Board's primary orienting, agenda management, and tracking resource

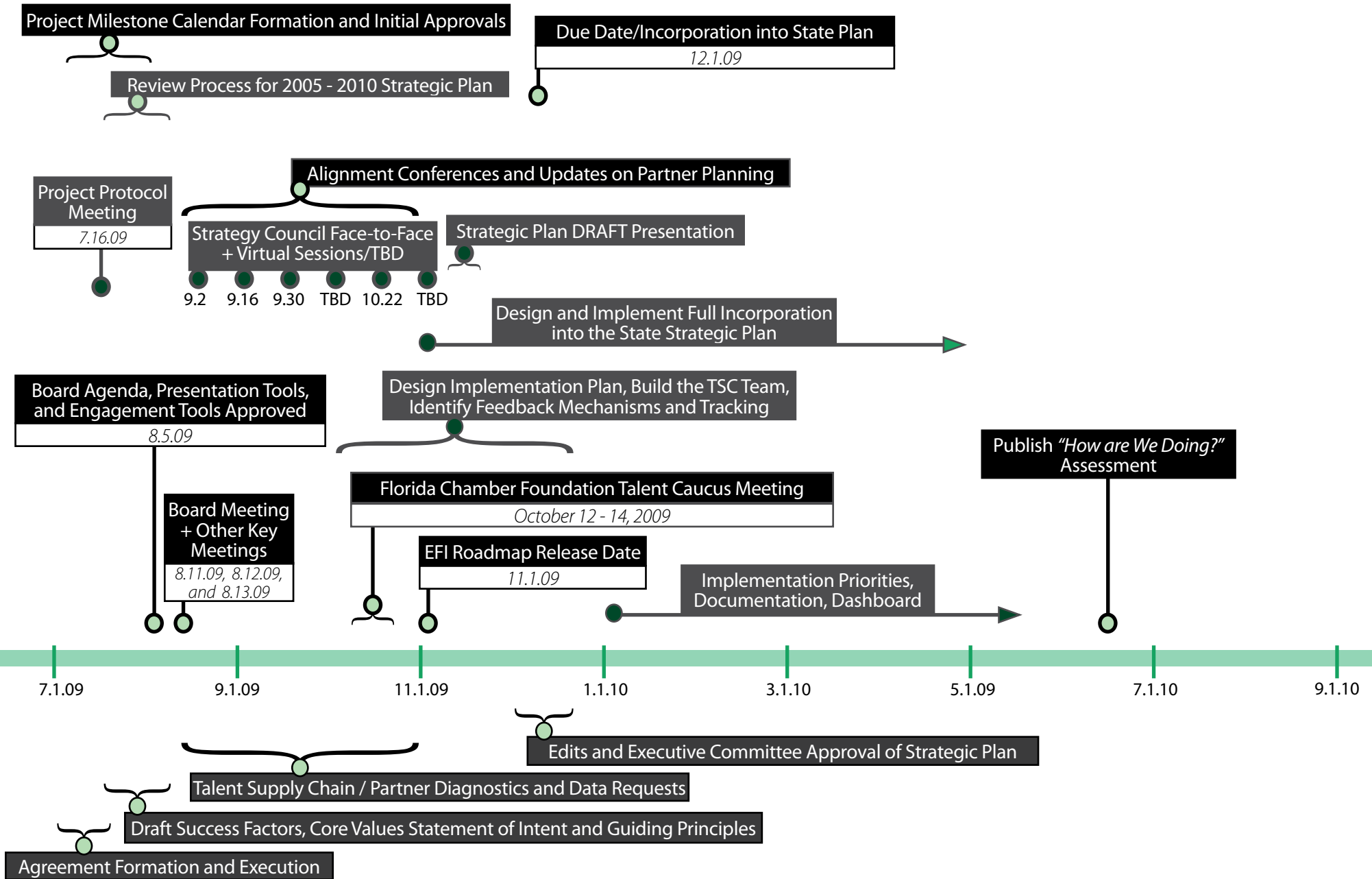
The Workforce Florida Board is committed to following project milestones and removing obstacles to performance when called upon; and is especially interested in Council consideration of the following questions:

- 1) How do we encourage and help unify partners in and around a Talent Supply Chain Team?
- 2) Where should we raise the bar in the performance of our own enterprise, Workforce Florida, Inc., over the next five years?
- 3) What are the best approaches to addressing recessionary conditions and getting Floridians back to work while taking on potential structural changes in the industry demand side?
- 4) What is the best, Board-level, dashboard for tracking progress and success?

## 10 Guiding Principles

- ❖ **Documentation** – Document Key Steps and Milestones throughout Planning Process
- ❖ **Transparency** – Ensure Documentation is in Plain View
- ❖ **Clarity** – Balance the Need to Address a Complex System with Clarity, Outlines, Summaries, Assumptions and Decision Points
- ❖ **Common/Shared Language** – Define and Re-define Key Terminology such as “Demand-Driven,” Talent Supply Chain” and “Universal Customer Access”
- ❖ **Ask the Tough Questions** – Create an Environment of Inquiry
- ❖ **Implementation** – Ensure Strategic Plan Work Product is Actionable and Measurable
- ❖ **Theory to Action** – Encourage Testing and Piloting of New Concepts, Solutions, and Partnerships
- ❖ **Collaboration** – Seek Ideas, Measures, Perspectives, Shared Accountabilities, Linkage(s) with Key Partners in Florida’s Talent Supply Chain
- ❖ **New Venues and Approaches** – Go to the Source, the Experts and the Discussion on the Terms and Calendars of Partners; Broaden Information Gathering Resources
- ❖ **Respect** – Honor Opinions and Insights; Seek out Innovative Ideas; Stay on Schedule

Timeline Development Document: **Conceptual Framework Only**



## Web Map | Briefing on the Tool

The Web Map is designed to guide development of an online portal for warehousing information and dialogue during the Strategic Planning Process. It provides a draft visual overview of how resources, session notes, contact channels, calendars, research and other information will be organized.

The Creating the Strategy for Today's Needs and Tomorrow's Talent can be accessed directly through a tile link on the Workforce Florida, Inc. home page. Visible top-line on the effort page will be the Statement of Intent, once finalized.

Links to the Guiding Principles, Calendar, Comment Drop Box and a Question & Answer page will be found on the effort page. The Comment Drop Box is intended to encourage insights and dialogue from visitors, including the general public and stakeholders who may not readily have the ability to attend face-to-face meetings and provide in-person input.

An additional link to the Session ToolKits will also be warehoused on the main effort web page. The Session ToolKit Pages will warehouse a variety of preparation and briefing materials for stakeholders. These materials include session notes, research and background data, session agendas and archives. The ToolKit pages will be organized by Session Number, and will be updated prior to and following each session.

Although the online tool is not scheduled to "go live" until August 15, this Web Map is intended to provide stakeholders with an understanding of how and where to access critical work product and background information, and to follow and engage in the ongoing dialogue of this effort – regardless of their ability to participate in person.

# Workforce Florida, Inc. Home Page

*Creating The Strategy*  
*for Today's Needs and Tomorrow's Talent*

Strategic Planning  
General Forum  
Page

Statement  
of Intent

Guiding  
Principles

Session  
ToolKits

Effort  
Calendar

Drop Box  
(comment  
forum)

Q & A

ToolKit  
Pages

Session Number:

I II III IV

Session Agenda  
Session Notes  
Research and Preparation Materials  
Archives



## Strategy Council Session Schedule | Working Draft

SESSION	TYPE	TIME/DATE	LOCATION	NOTES
1	Face to Face	Morning of Thursday, 8.12.09	Tallahassee	Already Scheduled
2	Face to Face	9 a.m. to 1 p.m.; Wednesday, 9.2.09	Orlando (Hyatt Orlando International Airport)	
3	Face to Face	9 a.m. to 1 p.m.; Wednesday, 9.16.09	Orlando (Hyatt Orlando International Airport)	
4	Virtual	9 a.m. to 11 a.m.; Wednesday, 9.30.09,	- Virtual -	
5	Face to Face	10.12.09, 10.14.09, or 10.15.09		*Linked to the Florida Chamber of Commerce Future of Florida Forum focusing on Talent
6	Virtual	9 a.m. to 11 a.m.; Thursday, 10.22.09	- Virtual -	
7	TBD	TBD	TBD	(considering optional Face to Face in preparation for 11.5.09 WFI Board Meeting)


Reissued July 31, 2009

This document is designed to brief the Chair of Workforce Florida, Inc., Belinda Keiser, on preparations for the launch of the 2009 Strategic Planning Process. Some resources and tools in support of the launch are subject to update and improvement in advance of July 31, the due date for Board materials.

➔ **Objectives of 3 Days of Work** – Thread questions related to the launch of strategic planning throughout the August 11, 12 and 13 sessions. Ensure participants/partners feel engaged and connected to the launch. Edit and improve draft documents and resources as needed. Utilize Board Session of August 13 as a final update and launch of 5 months of work. Participants in the 3 days of work understand roles and due dates. Strategy Council convenes its first, formative session in the planning process; and is commissioned for 5 months of work. Launch materials, including the Board's Statement of Intent, Milestone Timeline Calendar for Planning and Guiding Principles, are in place and on-line by August 15.

➔ **Building Blocks in the 3 Days of Work** – Draft Board Statement of Intent (commissioning and endorsing the planning process); Guiding Principles; Milestone Timeline Calendar for Planning and Communication; Preliminary Situation Assessment; Approved Process Title and Web Resource Map and Posting Tool.

- ➔ **August 11** – 90 minutes. Partners' orientation. Review and edit Statement of Intent, and Guiding Principles. Gain feedback on Situation Assessment. Share process title, Milestone Calendar Timeline, and web resource map and posting tool.
  
- ➔ **August 12** – 3 hours, including 1 hour formative session of Strategy Council and 2 hour extended Council Session. Orientation and feedback from August 11 meeting; and edit. Gain feedback on/edit Situation Assessment. Final review of Statement of Intent.
  
- ➔ **August 13** – 90 minutes. Board orientation and review of all edits and recommendations on Statement of Intent, and Guiding Principles. Presentation and discussion of Situation Assessment – Use electronic polling to test assumptions, perceptions and commitments. Reach consensus on Statement of Intent, Milestone Timeline Calendar, and Guiding Principles. Review web resource map and posting tool.
  
- ➔ **August 15** – POSTING – Statement of Intent; Milestone Timeline Calendar; Guiding Principles; and Protocols for Posting and Contacts. Based on the work of August 11, 12 and 13, the Consultant Team of Fairfield Index will recommend a joint letter from the Workforce Florida and Strategy Council Chairs to launch the web tool. A web map for the filing and access of key documents has been reviewed and approved by Workforce Florida's IT team.

 **Consultant Team** – Fairfield Index, Inc. is the Consultant Team for the planning process and has been working in advance of the August 11, 12 and 13 meetings to design and test a number of project resources, including: the Milestone Timeline Calendar; a web map; the draft Statement of Intent; the project identity; Guiding Principles and Council engagements. Key contact information for Fairfield Index –

**Don Upton**, President, Fairfield Index

Email: [dupton@fairfieldindex.com](mailto:dupton@fairfieldindex.com) | Cell: 813.767.9518 | Office: 813.490.3890


**Teresa Barber**, Manager – Regional Strategies & Transformation, Fairfield Index, Inc.


Email: [tbarber@fairfieldindex.com](mailto:tbarber@fairfieldindex.com) | Cell: 813.767.5782 | Office: 813.490.3890

**Fairfield Index, Inc. Headquarters**

10117 Princess Palm Avenue, Suite 340

Tampa, Florida 33610

 **Draft Milestone Timeline Calendar** – A preliminary, working version of the Milestone Timeline Calendar is attached (Attachment B), indicating detailed discussions and calendar comparisons among staff leaders, Strategy Council Chair David Armstrong and the Consultant Team. Prior to August 11, this tool will be further updated and color coded. All critical dates and milestones will be in place before the Board meeting of August 13.

 **Project Identity** – A recommendation for the project identity is attached (Attachment A). It is designed to reflect a work in-progress (subject to inquiry, exploration and change), a commitment to today's issues and employer needs of tomorrow, and a spirit of change and re-invention. Once approved, you will see it throughout the planning process, from the

session notes of the Strategy Council to postings at the Workforce Florida website. Required approvals: Workforce Florida Chair, Strategy Council Chair and President of Workforce Florida.



**Detailed Agendas for August 11, 12 and 13** - See Attachment C.



*Creating The Strategy  
for Today's Needs and Tomorrow's Talent*

Chair's Brief of July 28, 2009: Attachment A – Workforce Florida, Inc.  
Strategic Planning Process – Effort Brand Identity

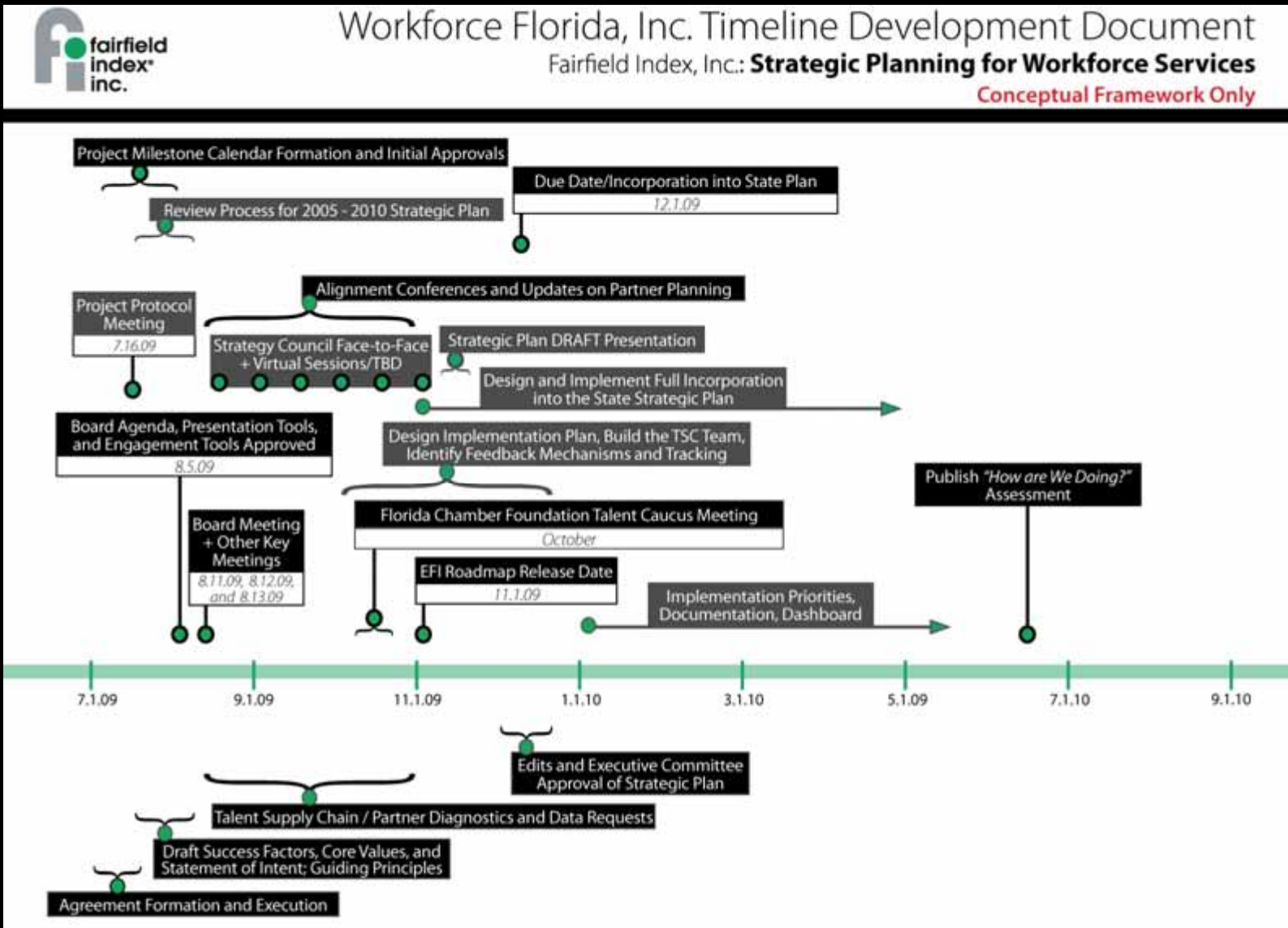
Reissued July 31, 2009

Attachment A

*Creating The Strategy  
for Today's Needs and Tomorrow's Talent*

Reissued July 31, 2009

## Attachment B



Reissued July 31, 2009

## Attachment C

August 11, 2009

Partners' Council Meeting

Strategic Planning Component – 90 minutes

- ❖ **Introductions, Context and Board Role on August 13** – David Armstrong, Chair – Workforce Florida's Strategy Council
  
- ❖ **Introductions** – Don Upton, President – Fairfield Index, Inc./Consultant Team
  
- ❖ **Business of the Partners' Council Meeting: Orientation to Planning Process and Resources; Draft Statement of Intent; Guiding Principles and Situation Assessment** – Upton
  
- ❖ **Orientation and Resources** – Armstrong, Upton, and Team
  
- ❖ **Situation Assessment** – Team Discussion
  
- ❖ **Draft Statement of Intent** – Upton and Team
  
- ❖ **Guiding Principles** – Upton and Team
  
- ❖ **Milestone Timeline Calendar and Communications** – Upton and Team
  
- ❖ **Next Steps** – Armstrong

**August 12, 2009**

**Strategy Council Formative Session and Extended Meeting**

**3 Hours/1 Hour Formative Session and 2 Hour Extended Meeting**

- ❖ **Strategy Council Formative Session (Session #1 of Strategic Planning Process) – 1 Hour**
  
- ❖ **Welcome, Call-to-Action and Board Role on August 13 – David Armstrong, Chair – Workforce Florida's Strategy Council**
  
- ❖ **Draft Milestone Calendar Timeline and Preparation for Extended Meeting – Don Upton, President – Fairfield Index, Inc./Consultant Team**
  
- ❖ **Draft Statement of Intent – Upton and Team**
  
- ❖ **Guiding Principles – Upton and Team**
  
- ❖ **Approaches to Team Engagement/Subject Matter/Staging – Team**
  
- ❖ **President's Perspectives – Chris Hart, President – Workforce Florida, Inc.**
  
- ❖ **Next Steps and Transition to Extended Meeting – Armstrong**

**August 13, 2009**  
**Workforce Florida Board Meeting**  
**Strategic Planning Component – 90 minutes**

❖ **Setting the Stage – Why Now?**

**Commissioning the Strategy Council** – Belinda Keiser, Chair – Workforce Florida, Inc.  
Board of Directors

❖ **Introduction of Strategy Council; and Recognition of the Work of August 11 and 12–**  
David Armstrong, Chair – Workforce Florida, Inc. Strategy Council

❖ **Assumptions and Perceptions\* - Situation Assessment** – Don Upton, President –  
Fairfield Index, Inc.; Teresa Barber, Manager – Regional Strategies & Transformation –  
Fairfield Index, Inc./Consultant Team

❖ **Results and Recommendations – Statement of Intent** – Upton and Board Team

❖ **Results and Recommendations – Guiding Principles** – Upton and Board Team

❖ **Milestone Timeline Calendar; Council's Staging of Issues** – Armstrong, Upton, and  
Board Team

❖ **Ready to Launch; Next Steps** – Armstrong

\*Utilizing Electronic Polling