



Board of Directors Strategic Retreat

Orlando Economic Partnership
301 E. Pine Street, Suite 900, Orlando, FL 32801
Friday, November 3, 2017 / 11:00 a.m. – 4:00 p.m.

Strategic Goals developed by the Board:

- CareerSource Central Florida will become business focused in all efforts
- CareerSource Central Florida will identify ways to measure progress and Return On Investment (ROI)
- CareerSource Central Florida will become the backbone organization for workforce development in Central Florida

1. **Welcome / Introductions** Debbie Clements
Chair, CSCF Board
2. **Orlando Economic Partnership – Merger / Overview** Tim Giuliani
President/CEO, Orlando Economic Partnership
3. **State of the Region** Pamela Nabors / Mimi Coenen
President/CEO / Chief Operating Officer

Lunch Break (*working lunch*)

4. **CareerSource Central Florida Strategies**..... Gert Garman
Consultant
5. **Facilitated Discussion**
6. **Closing Remarks** Pamela Nabors

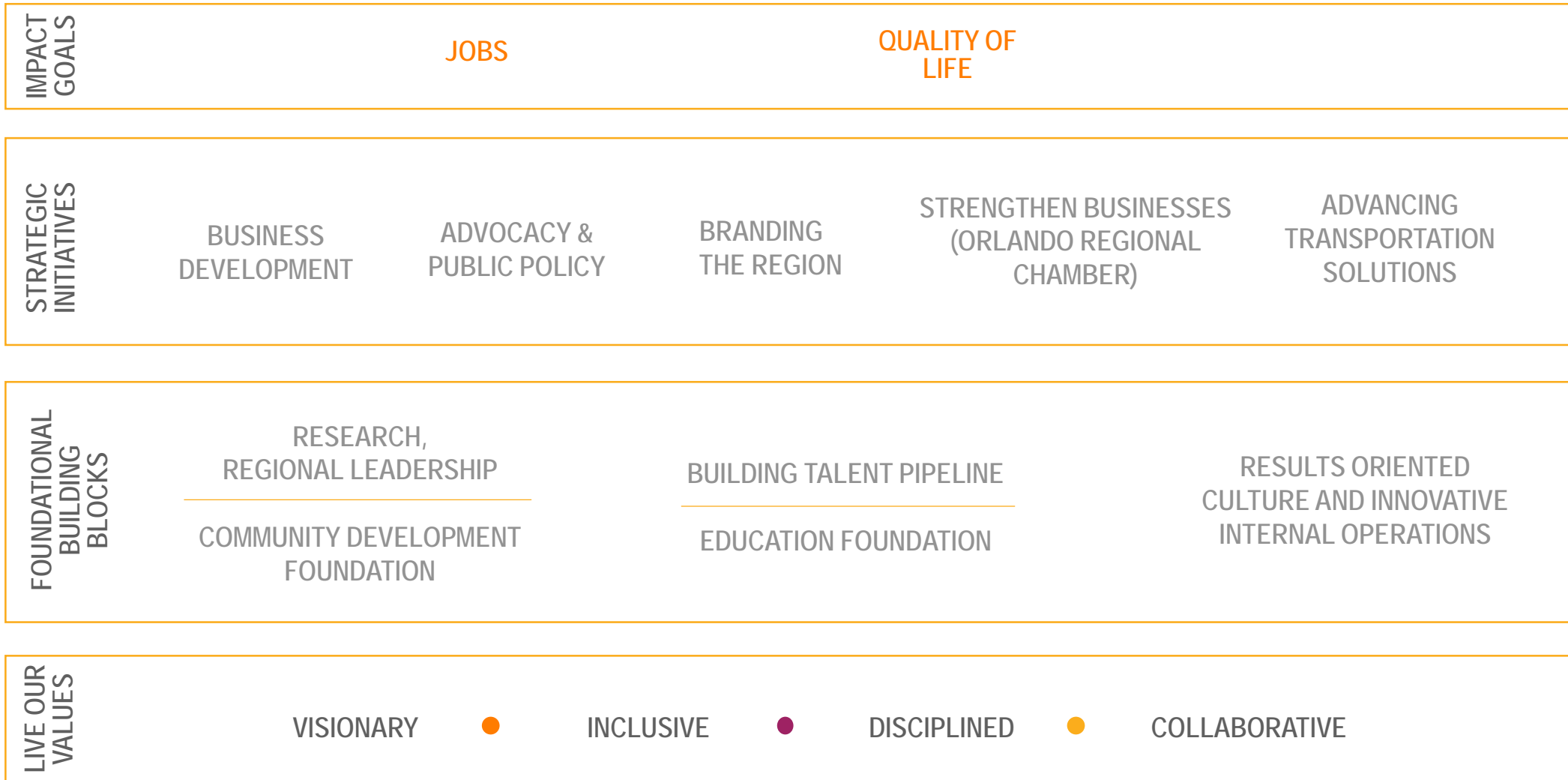


**ORLANDO
ECONOMIC
PARTNERSHIP**

Tim Giuliani

President & CEO

A REGIONAL APPROACH TO BROAD-BASED PROSPERITY



Bold Vision Supported by Five Bold Moves

1. Enhance our business development efforts to support double digit job growth
2. Build our global business brand by launching Phase II: *Orlando. You don't know the half of it*
3. Advance critical community initiatives through advocacy and public policy
4. Plan for the future: refine our strategic framework for greater impact
5. Retool the operations, staff and investor engagement strategies



EXPERT STAFF

Dale Brill, Ph.D.

SVP of Research and the
Foundation for Building Community
Orlando Economic Partnership



A photograph of the Amazon HQ2.0 building, a large, spherical structure with a complex, geometric, metallic facade. The building is set against a backdrop of modern skyscrapers in a city. In the foreground, a rooftop terrace is visible with several people and dogs. One person is sitting on a bench, another is standing and talking to a dog, and a third is sitting on the ground. The overall scene is bright and modern.

AMAZON HQ2.0

AMAZON PROJECTED ECONOMIC IMPACT

*over 15 years

\$5B
Labor

86,575
Total
Jobs



44,000
direct jobs

\$3.85B
Construction
Spending

26,300
Construction

17,650
Management

\$106.6M
Direct State
and Local
Taxes



ANNOUNCEMENT OF JIM HARTMANN

Jim Hartmann

Alliance for Regional Transportation
Orlando Economic Partnership



2016-17 BUSINESS DEVELOPMENT RESULTS



AMERICANTOURS INTERNATIONAL, LLC



Arrow Sky Media



FY 2016-17 COMPLETED PROJECTS & GOAL METRICS

As of September 30, 2017

Core Metrics	Goal	Completed	% Attained
New Jobs: Total	3,600	4,271	119%
Capital Investment	\$305,038,800	\$769,547,333	252%
Average Wage	\$55,034	\$40,399	73%
Payroll	\$198,122,400	\$172,545,627	87%
Film: Permitted Production Days	300	644	215%
Film: Non-Permitted Production Days	100	102	102%



PROJECT HIGHLIGHTS



1,500
new jobs



\$106,000
average wage



PROJECT HIGHLIGHTS



\$430M
capital investment



100
new advanced
manufacturing jobs



FY 2017-18 CORE METRICS

Core Metrics	Annual Goal
New Jobs	4,000
Capital Investment	\$300,000,000
Average Wage	\$52,238
Film: Permitted Production Days	300
Film: Non-Permitted Production Days	100





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ECONOMIC
PARTNERSHIP

Questions?

BBQ ON THE BLVD

February 7, 2018

ORLANDO
ECONOMIC
PARTNERSHIP

FEBRUARY 7, 2018

BBQ ON THE
BOULEVARD

★ ★ ★ ★ ★

The poster features a grey silhouette of the Orlando skyline at the bottom, including the dome of the Florida State Capitol and several skyscrapers. The text is centered and uses a bold, sans-serif font. The event title 'BBQ ON THE BOULEVARD' is the most prominent element, with 'ON THE' nested within the 'Q' of 'BBQ'. Five orange stars are positioned below the main title. The Orlando Economic Partnership logo, consisting of a circular arrangement of orange dots, is located in the upper left of the poster area.



ORLANDO
ECONOMIC
PARTNERSHIP

Thank you.



State of the Workforce

Board of Directors Meeting

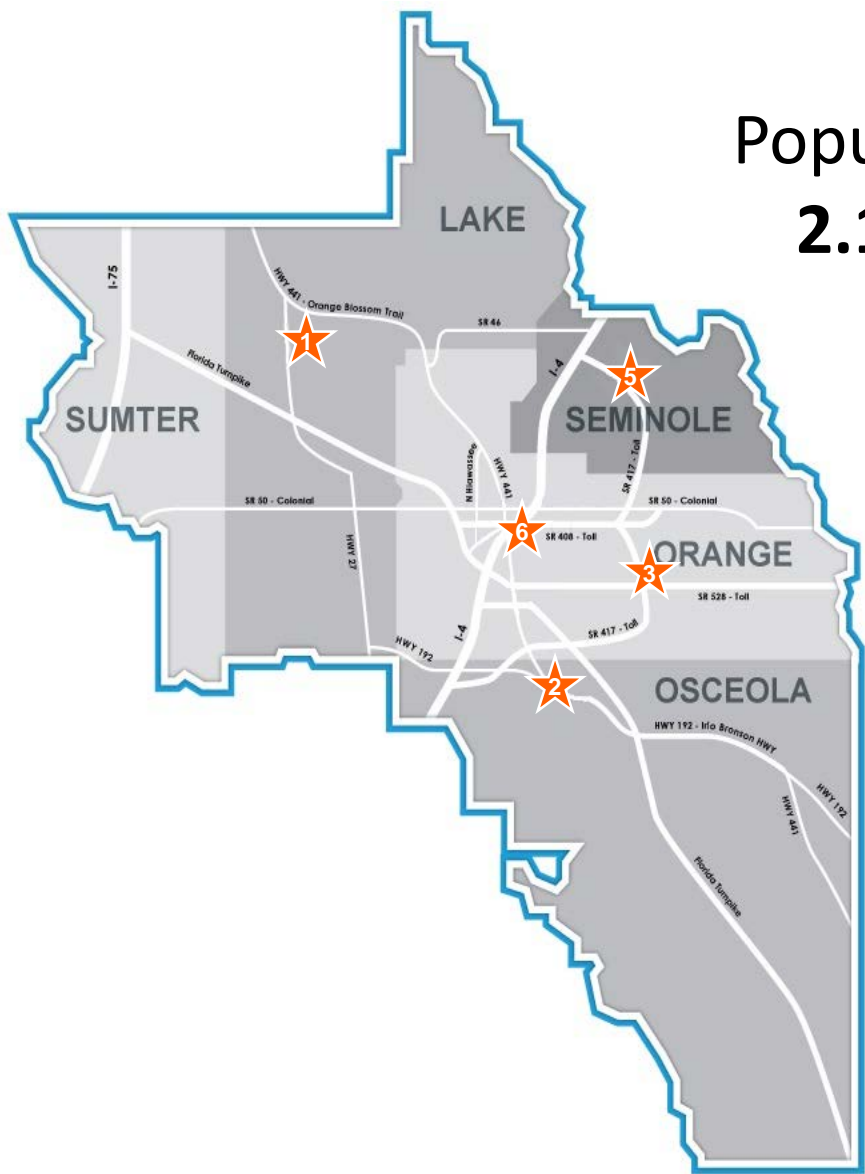
November 3, 2017

The Region's Changing Economy

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POPULATION



Population 2010
2.19 Million

Population 2015
2.3 Million

Estimated
Population 2020
2.4 Million

*U.S. Census 2016
Combined Orlando and The Villages MSA*

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ECONOMIC INDICATORS

REGIONAL GROWTH

Orlando MSA – one of the 20 fastest growing MSAs in US
The Villages MSA – nation's fastest growing MSA

JOB GROWTH

4% job growth in 2016
3.2% job growth in 2017 (QTR2)

CONSUMER SPENDING

Up 3.1% in 2017 from 2016
\$9.97M to \$10.27M

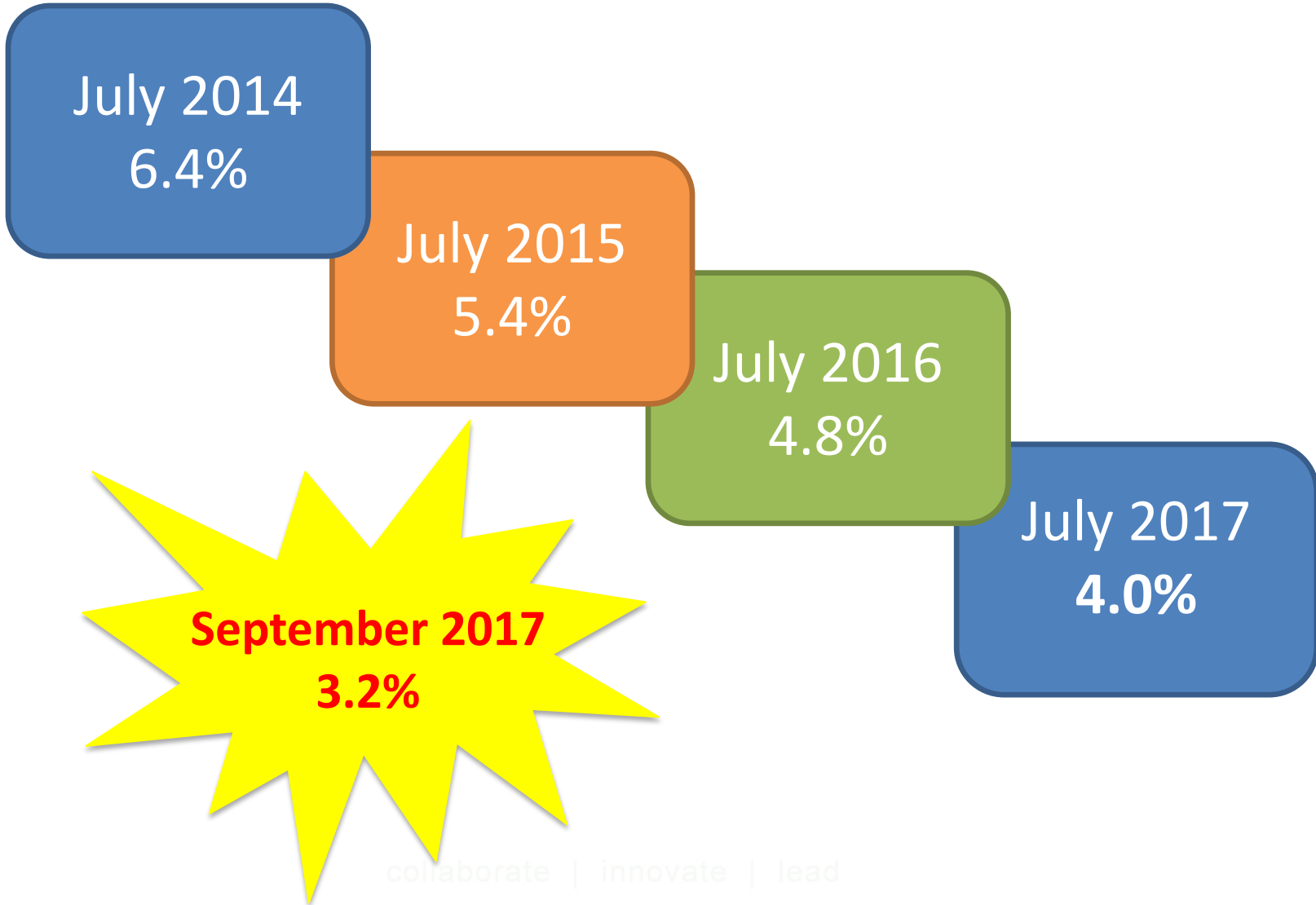
HOME SALES

4.1% increased sales from 2016
13% increase in single family permits in 2017



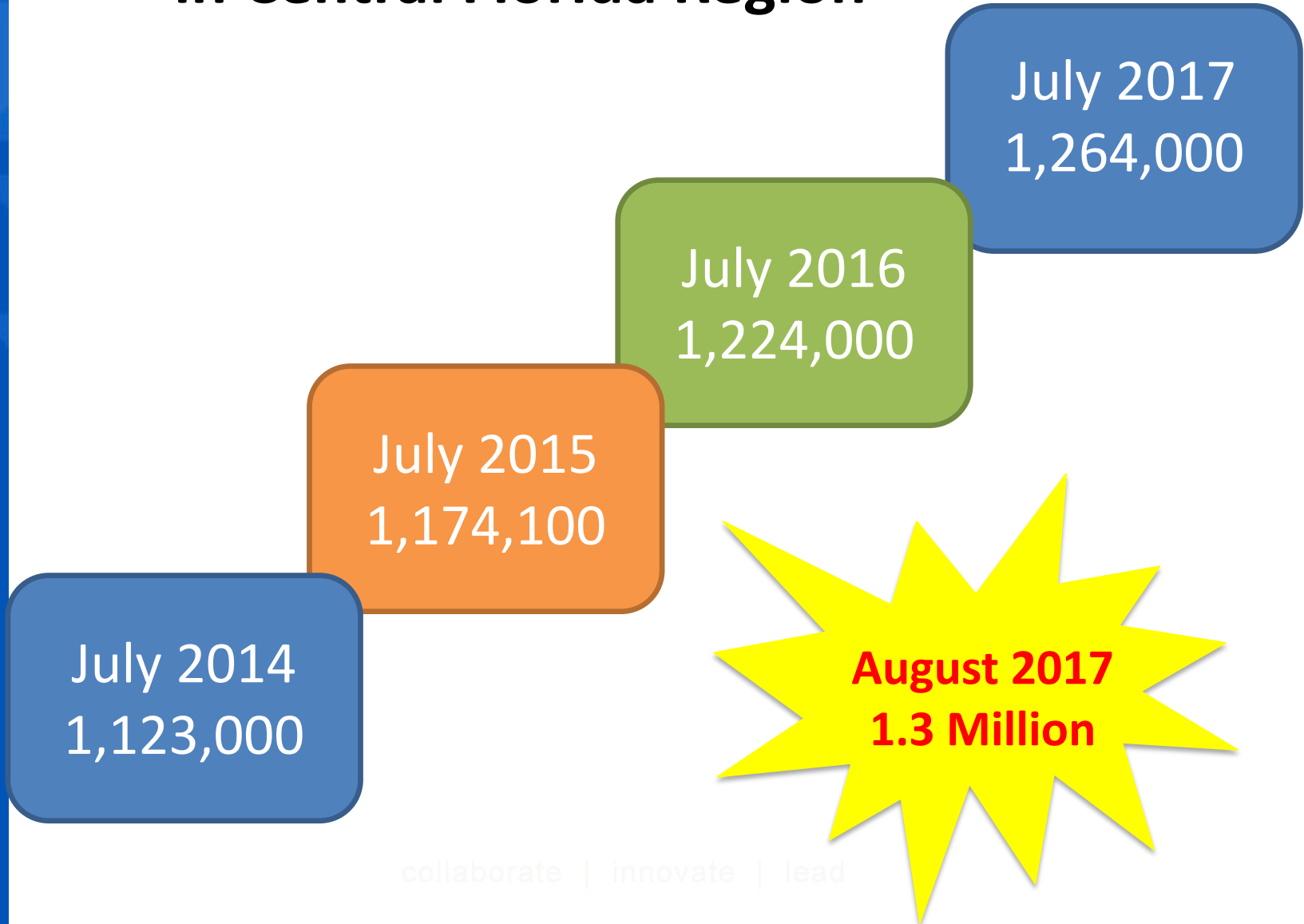
Unemployment in Central Florida Region

WORKFORCE

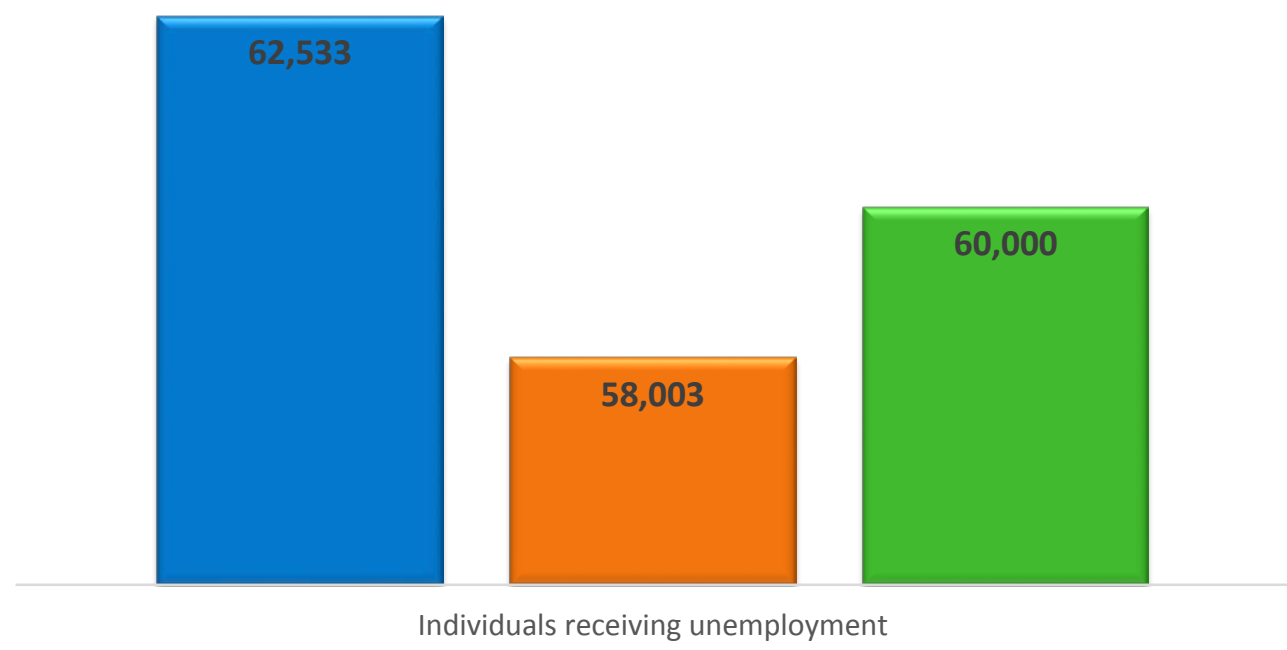


WORKFORCE

Number of Individuals Employed in Central Florida Region



Number of Unemployed Individuals in Central Florida Region



■ PY 14-15 ■ PY 15-16 ■ PY 16-17

Financial Resources

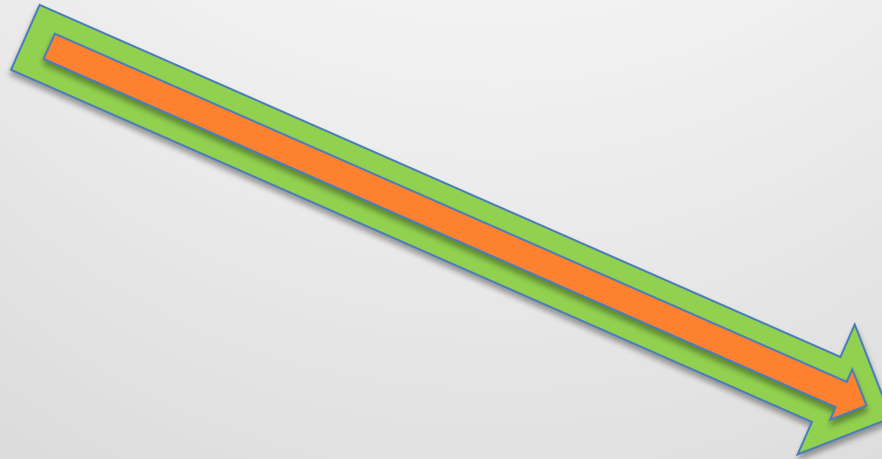
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Financial Resources

CSCF has experienced an **11.4%** decrease in funds since 2014.

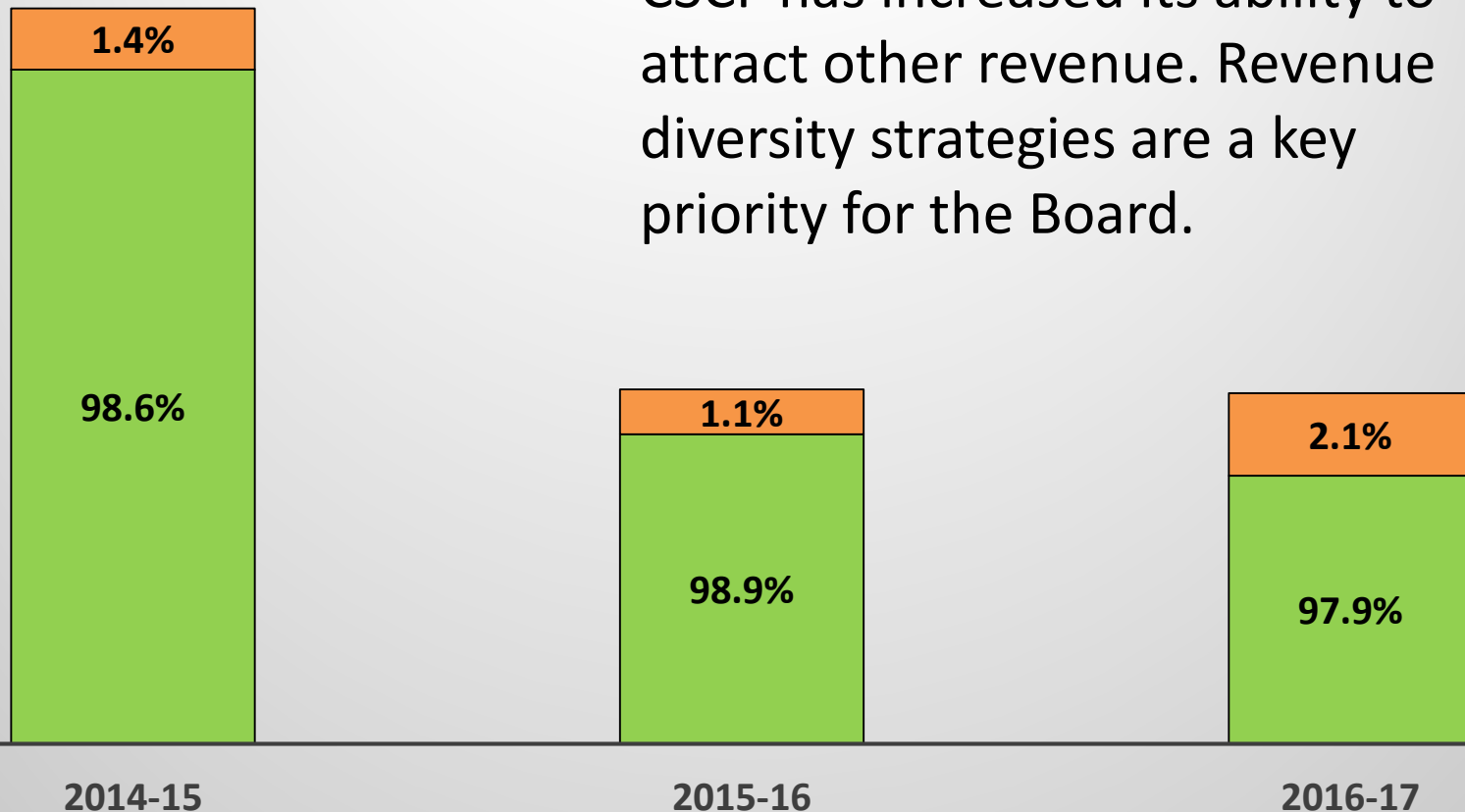
\$31,474,368
2014-2015



\$27,902,305
2016-2017

Financial Resources

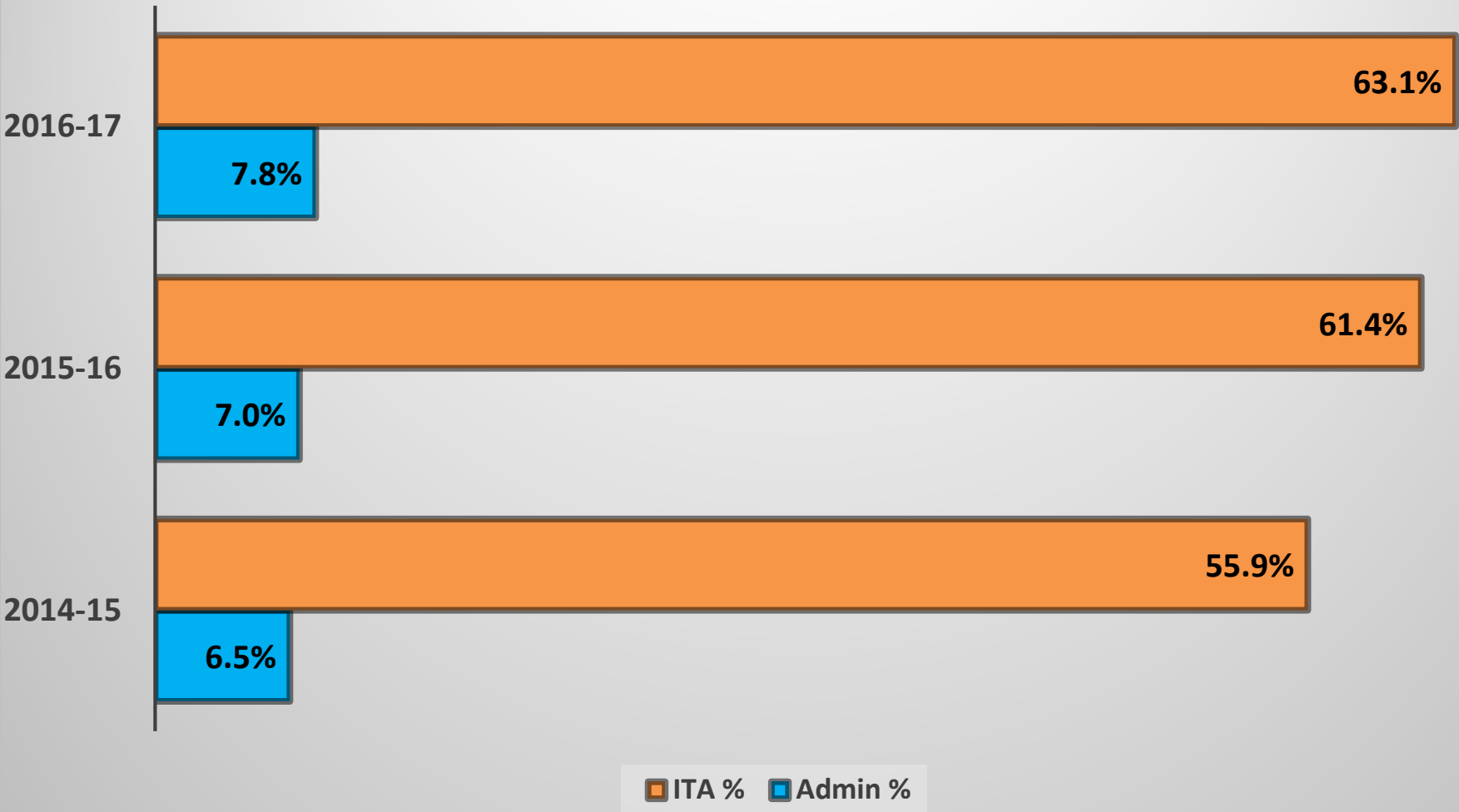
Through these funding trends, CSCF has increased its ability to attract other revenue. Revenue diversity strategies are a key priority for the Board.



■ Revenue From DEO ■ Other Revenue

Financial Resources

Percentage of Expenditures in Talent Development and Administration Cost



Amount Invested in Training FY 2016 - 2017

\$3.54M

Percentage of Overall Training Dollars Invested By Industry:

39.8%	Business & Professional Services (IT included)
29%	Healthcare
9.9%	Manufacturing
9.5%	Trade and Logistics
9.3%	Construction
2.5%	Hospitality & Tourism

Source: Information from Employ Florida databases

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Serving Business

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Jobs! Jobs! Jobs!

1,441,000

Private-Sector Jobs Added Since
December 2010*

231,977

Available Jobs In Florida*

24,900

Orlando-Kissimmee-Sanford
over-the-year jobs gain**
(leads state)

37,371

Jobs available in the
Orlando-Kissimmee-Sanford***



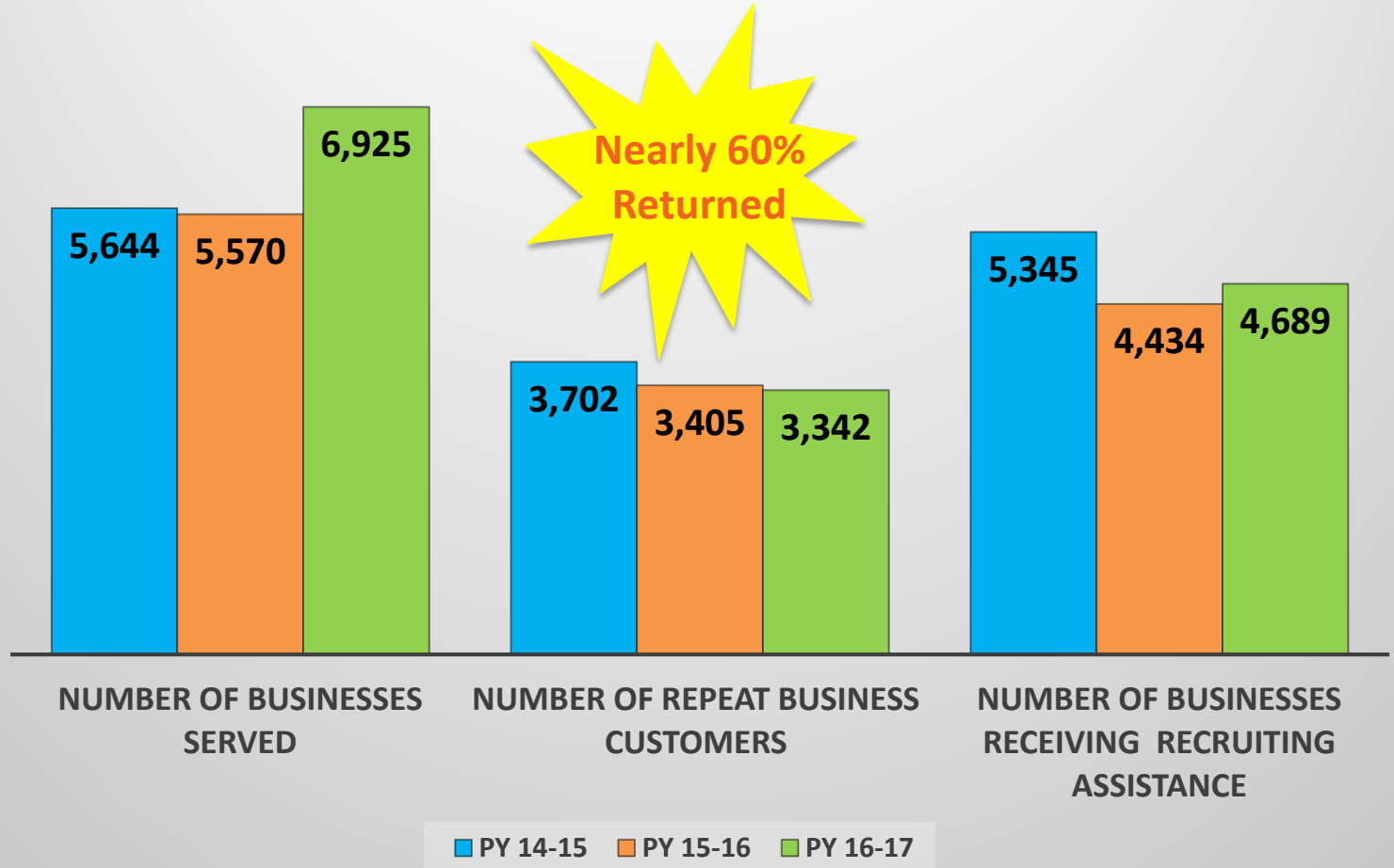
* August 2017 Florida Department of Economic Opportunity; Seasonally Adjusted.

** September 2017 Florida Department of Economic Opportunity; Seasonally Adjusted.

***September 2017 The Conference Board, Help Wanted OnLine, Florida Department of Economic Opportunity, Bureau of Labor Market Statistics.

Businesses Served by CSCF

CareerSource Central Florida served over **18,000** businesses over the past three years; over **10,400** of them were repeat customers; over **14,400** of them received recruiting assistance.



BUSINESS ENVIRONMENT

Sector	Employer Served	Number Placed	Average Wage
Administrative and Support and Waste Management and Remediation Services	755	1703	\$9.26
Transportation and Warehousing	257	466	\$10.57
Retail Trade	448	633	\$10.95
Manufacturing	633	103	\$11.53
Accommodation and Food Services	587	536	\$12.23
Health Care and Social Assistance	759	164	\$12.74
Construction	892	68	\$13.73
Professional, Scientific, and Technical Services	674	84	\$13.97
Information Technologies	145	82	\$19.23

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Talent Pipeline

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Serving Career Seekers

On average, **40%** of all those served over the past three years are placed into employment.

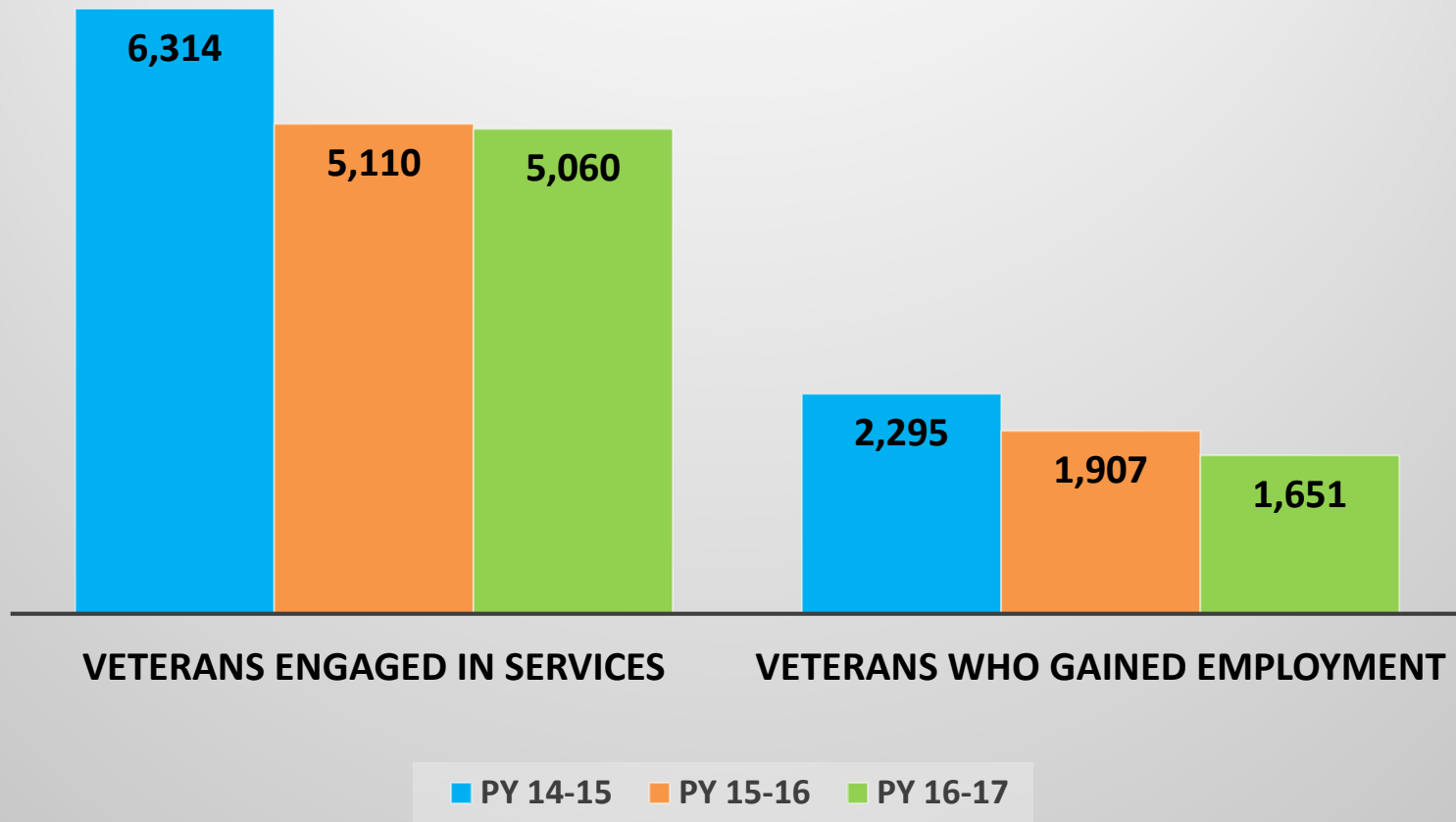
In Program Year 2014-2015: CSCF served **101,263** individuals; **39,800** individuals were employed

In Program Year 2015-2016: CSCF served **89,185** individuals; **39,999** individuals were employed

In Program Year 2016-2017: CSCF served **82,197** individuals; **30,214** individuals were employed

Serving Veterans

Over the past three years, CSCF has served over **16,400** Veterans with workforce services, and helped place over **5,800** Veterans into employment.



Educational Attainment

PY 16-17

Of the 81,783 individuals served, most have a high school diploma or some college.

Less Than High School	5.5%
HS/GED	35%
Vocational Certificate	8%
Some College	16%
Assoc. Degree	12%
Bachelor's Degree	16%
Higher than Bachelor's	6%
N/A	1.5%
Total	100%

Who Does CSCF Serve?

Recent analysis identified that the majority of CSCF's customers are:

- Between the ages of 22 and 44;
- Have a high school diploma or some college;
- Have work experience over 5 years; and
- Earn less than \$15 per hour

Who Are CSCF's Youth?

Recent analysis identified that the majority of CSCF's customers are:

- Between the ages of 19 and 21;
- Do not have a high school diploma;
- Not connected to work or education; and
- Read and write at a 6th grade level

Serving Career Seekers

Efforts to Outcomes – Wagner Peyser

	WP Program Participants	WP Placed into Jobs	WP % Placed into Jobs
PY14-15	57,952	18,342	31.65%
PY15-16	45,426	16,316	35.92%
PY16-17	35,908	13,949	38.85%

60% of successful career seekers in placement services are CSCF's customer targeted demographic

40% have previous work experience with the majority having between 10-19 years

Most successful career seekers received staff supported services.

WP = Wagner-Peyser. WP Customers are also called Universal Customers, and receive basic employment services

Serving Career Seekers

Efforts to Outcomes - WIOA

	WIOA Program Participants	WIOA Placed into Jobs	WIOA % Placed into Jobs
PY14-15	3,798	2,417	63.64%
PY15-16	2,144	1,545	72.06%
PY16-17	2,187	1,933	88.39%

In this group, 87% participated in work experience or class room training

83% came to CSCF with previous work history.

Those exiting between the ages of 22 to 32 were the highest exiting group.

WIOA = Workforce Innovation & Opportunity Act. Customers must meet program requirements and received intensive services and training.

Industry Insights

Construction	Fiscal Year 15-16	Fiscal Year 16-17
Individuals in Training	132	168
Individuals completing training	106	164
Employed after training	98	113
Employed in construction after training	75	104
Average wage at employment for completers	12.26	12.83
Construction related employment average wage	\$12.64	\$14.74

Industry Insights

Manufacturing	Fiscal Year 15-16	Fiscal Year 16-17
Individuals in Training	130	164
Individuals completing training	130	103
Employed after training	75	78
Employed in Manufacturing after training	47	50
Average wage at employment for completers	\$14.58	\$15.64
Manufacturing related employment average wage	\$15.21	\$15.78

Industry Insights

Healthcare	Fiscal Year 15-16	Fiscal Year 16-17
Individuals in Training	504	503
Individuals completing training	371	397
Employed after training	339	285
Employed in Healthcare after training	252	228
Average wage at employment for completers	\$14.55	\$13.53
Healthcare related employment average wage	\$15.83	\$14.30

Industry Insights

Hospitality	Fiscal Year 15-16	Fiscal Year 16-17
Individuals in Training	552	312
Individuals completing training	519	271
Employed after training	396	140
Employed in Hospitality after training	186	63
Average wage at employment for completers	\$9.19	\$10.68
Hospitality related employment average wage	\$8.88	\$10.11

Industry Insights

Trade & Logistics	Fiscal Year 15-16	Fiscal Year 16-17
Individuals in Training	107	133
Individuals completing training	86	108
Employed after training	76	87
Employed in Trade & Logistics after training	53	67
Average wage at employment for completers	\$15.81	\$15.01
Trade & Logistics related employment average wage	\$17.38	\$15.11

Industry Insights

Business & Professional	Fiscal Year 15-16	Fiscal Year 16-17
Individuals in Training	660	664
Individuals completing training	536	535
Employed after training	385	311
Employed in Business & Professional after training	127	198
Average wage at employment for completers	\$13.82	\$15.59
Business & Professional related employment average wage	\$13.20	\$16.31

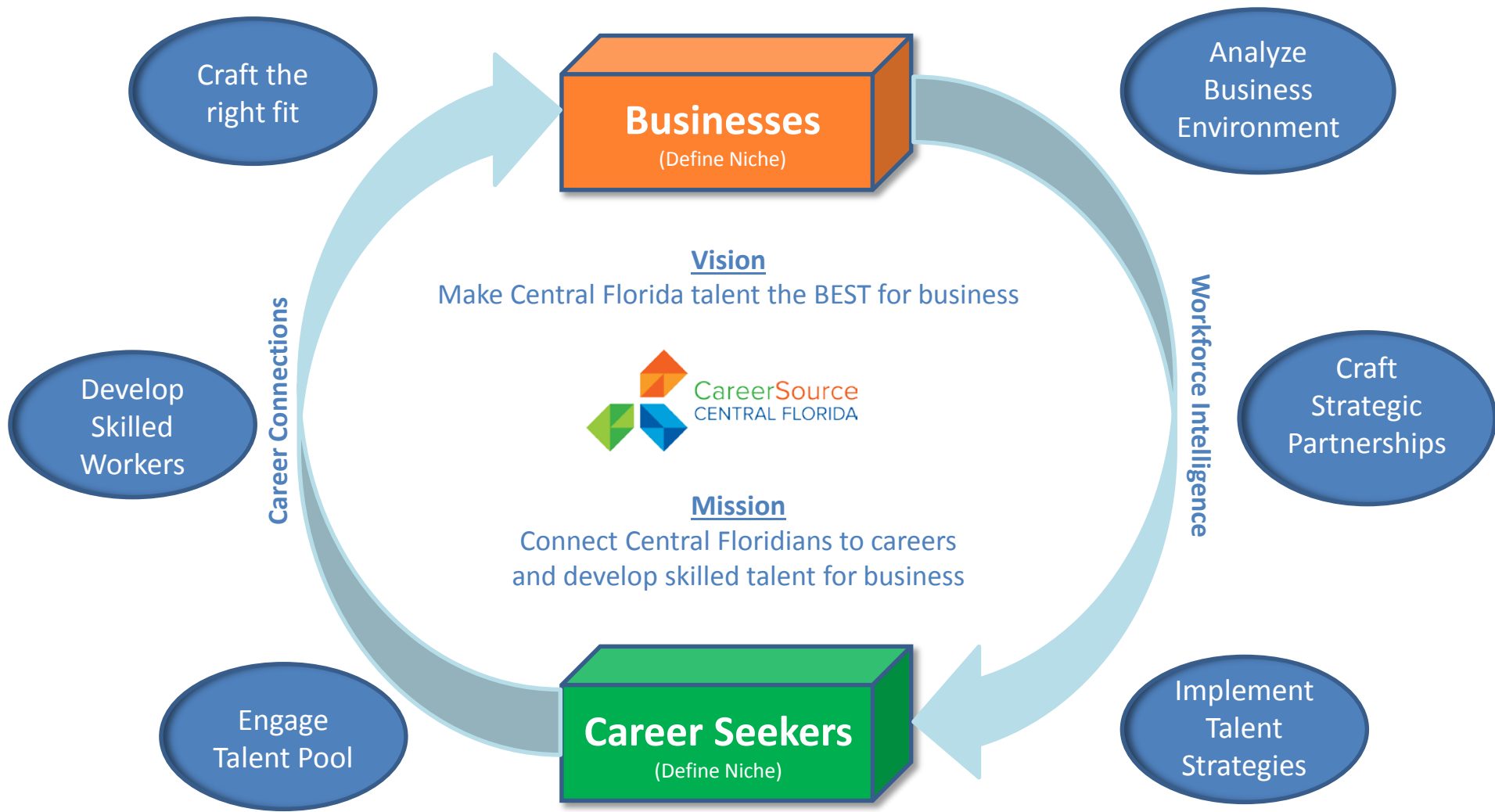
Getting Focused

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<p>CareerSource Central Florida Board Strategies</p>	<p>Raise the profile of CareerSource Central Florida by convening business for education and awareness.</p>	<p>Create a business-driven system supported by all providers that is intentional, focused, and coordinated.</p>	<p>Plan for ongoing board-level planning discussion to ensure a balance of board member responsibility to oversight and insight, and define what it will mean for the Board to become an innovative thought leader on workforce development</p>
	<p>Implement an education and outreach plan to increase business' awareness on workforce development issues and talent development opportunities.</p> <p>Engage each Board Member for quality referrals to obtain new business opportunities and raise the profile of CSCF</p> <p>Formalize an ad hoc group to create a process for feedback to the Board on the referral process</p>	<p>Support and champion the need for a comprehensive workforce system in Central Florida.</p> <p>Conduct a regional inventory of workforce programs and services to identify potential partners and areas of duplication.</p> <p>Research and inventory current programs and outcomes tied to high growth industries.</p>	<p>Continue to structure Board agendas and meetings to address oversight and allow time for Board members to gain insight by providing business intelligence on industry needs / trends, economic factors, and talent supply needs.</p>
	<p>Validate assumptions about business needs through formal and informal processes, and analyze results to deliver market-defined services.</p> <p>Convene strategic events for business that provide value to attendees and opportunities for CSCF Business Service staff to make new connections.</p>	<p>Convene a collective group of key regional non-profit organizations' Board Chairs and staff to discuss and create a shared vision and approach to develop the talent supply for business.</p>	<p>Conduct an annual retreat that is sufficient in length to fully engage Board members in discussion on goals, strategies, and organizational performance.</p>
	<p>Continue advocacy for the workforce system as a valuable resource that can support and enhance business growth.</p>	<p>Reshape current career centers to link to high growth industries through targeted strategies that connect business to needed talent.</p>	
		<p>Create youth engagement centers that provide comprehensive services and support youth connection to high growth industries.</p> <p>Engage local youth providers to develop a shared vision and strategy to help young people become more connected to educational opportunities, jobs and careers.</p>	

Organizational Process



Getting Focused

1. What career seeker customer does CSCF attract and serve successfully? How can CSCF develop a unique market niche?
2. With a population increasing and diversifying in Central Florida, what workforce services will yield the best talent pipeline?
3. Businesses continues to struggle with finding talent that meets their needs. In 2015, CSCF selected 6 sectors: Business & Professional Services, Construction, Healthcare, Hospitality & Tourism, Manufacturing, and Trade & Logistics. Can CSCF support the talent needs of six industries? Given previous year outcomes, what sectors yield the best results?
4. Looking in to the future CareerSource Central Florida will have fewer federal resources for training and talent development. How do we attract revenue and/or investment to support ongoing talent development?

Discussion

Q&A

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Positive Minded



Share the Air



Be Present!



Date An Idea, But Don't Marry It



Vegas



Creativity Behaviors



Greenhousing



Freshness



Signaling



Playfulness









Make Sure You Are Working On the Right Challenge!



The Russians Come to Visit



They Only Let Us Take...





Challenges:

- What career seeker customer does CSCF attract and serve successfully? How can CSCF develop a unique market niche?
- With a population increasing and diversifying in Central Florida, what workforce services will yield the best talent pipeline?
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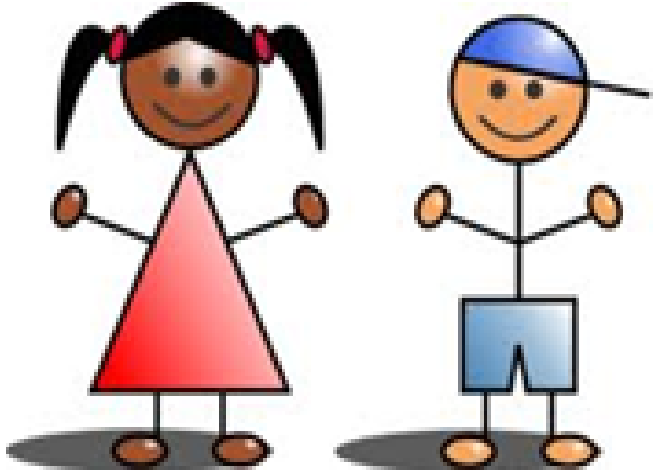
Sexy Headline

Idea:

Tactics to Support the Idea:

- ---
- ---
- ---
- ---
- ---

Draw a Picture of Your Idea:



Stick figures are totally groovy!

One Lucky Person!!



Bravery

“The Opposite of Bravery is NOT Cowardice, It’s Conformity.”



Thank you very much!

**Remember to
Collabor8!**

Cre8! Innov8!

www.broadperspective.net

