

Agenda

Governance Committee Meeting

10/7/2021

2:00 p.m.



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|--|---------------------------------|
| I. Welcome | Holly Henderson, Chair |
| II. Meeting Minutes Approval – August 12, 2021 | Action Item I Pages: 1-2 |
| III. CSCR Board Retreat Facilitator RFQ Proposals | Action Item II |
| A. CSCR RFQ Proposal | Page: 3 |
| 1. Marcella Consulting | Pages: 4-12 |
| 2. Fairman Consulting | Pages: 13-35 |
| 3. Thomas P. Miller & Associates | Pages: 36-48 |
| IV. Information Item – Board Vacancy | |
| A. Leon County Business CEO, VP or HR | |
| V. Adjourn | |

Next Meeting
January 6, 2022

Minutes



Governance Committee Meeting

8/12/2021

3:30 p.m.

ATTENDEES: Holly Henderson, Scott Watson, Martina McDowell, Regina Browning, and Danielle Price-Andrews

Members Absent: Fred Seamon

Staff Present: Jim McShane and Dee Robinson

Recording: Patricia McCray

I. **Call To Order**

Chair Henderson welcomed everyone and called the meeting to order at 3:33 PM. She explained that anyone attending from the public could participate; however, public comment is held to a three (3)-minute limit.

II. **Action Item I: Meeting Minutes Approval – August 12, 2021**

Chair Henderson drew the Committee's attention to the August 12, 2021, Governance Committee meeting minutes. She asked if anyone had any questions or comments about the minutes, and there were none.

MOTION: Chair Henderson entertained a motion to approve the minutes; Martina McDowell made the motion, Regina Browning seconded. **Action Item Approved.**

III. **New Gadsden Co. Commissioner**

- a. **Commissioner Kimblin NeSmith** - Jim welcomed Commissioner Kembin NeSmith as the new Commissioner replacing Commissioner Eric Hinson. Commissioner NeSmith represents Gadsden County, District 3.

IV. **New Board Members** – Jim welcomed three new Board members Mike Temple, Administrator with Talquin Electric in Gadsden County, Terrence Watts, FL Dept. of Children and Families, who replaces Jeanna Olson and Monique Gustafson, FL Vocational Rehabilitation, who replaces Tawana Gilbert.

V. **New Board Members Required Orientation with Sunshine Law presentation – August 26, 2021**

- a. Jim stated that Orientation would be held on August 26, 2021. All new Board members will be required to attend – Mike Temple, Terrence Watts and Monique Gustafson.

VI. **New Members Required to Attend Only the Sunshine Law Presentation – August 26, 2021**

- a. Earlier this year, when Board member Orientation was held, the Sunshine Law Presentation was not provided. Amy Geiger – Wakulla Co. EDC, Erin Gillespie – Leon County, and Mandy Bianchi – Leon County will only attend the Sunshine Law presentation.

VII. **Strategic Discussion – Review DEO Policies**

- a. **CSCR Bylaws** – Jim stated there is a change in the terms to serve on the CSCR Board. It will be amended to state that a Board member can serve two three-year terms and one two-year term, totaling eight years, which passed in the law this year. Also, all Board members have been grandfathered on the board before July of this year, and new Board members on the board after July 1, 2021, will serve the eight-year term. Jim continued to review other edits in the CSCR Bylaws, which are highlighted in the agenda packet.
- b. **CSCR Board Member Policy** – Jim stated that in the CSCR Board Member Policy, he reset the number of the items and added language from the DEO Administrative Policy N. 091 and Policy No. 110, all highlighted in the document included in the document the agenda packet.

Jim stated that he would need a vote from the Committee to make the changes highlighted in CSCR Bylaws and the Board Member Policy.

Minutes



Governance Committee Meeting

8/12/2021

3:30 p.m.

MOTION: Chair Henderson entertained a motion to approve the highlighted changes to the CSCR Bylaws and the Board Member Policy; Regina Browning made the motion, and Martina McDowell seconded. **Action Item Approved.**

- c. **DEO Administrative Policy No. 091** – Jim stated that this is the recent DEO Policy No. 091 that provides the Local Workforce Development Boards (LWDBs) with the requirements for LWDB membership composition under the Workforce Innovation and Opportunity Act (WIOA) and Chapter 445, Florida Statutes (F.S.), and the process for certification of LWDBs. The new highlighted changes made to the CSCR Bylaws and the CSCR Board Member policy were provided in this policy.
- d. **DEO Administrative Policy No. 110** – Jim stated this DEO Policy No. 110 guides Chief Local Elected Official (CLEOs), Fiscal Agents, Local Workforce Development Boards (LWDBs), LWDB Chairpersons, LWDB Executive Directors, LWDB staff, and workforce system partners on the requirements for local workforce development area ("local area") and LWDB governance. This policy outlines key roles, responsibilities, and requirements of the entities/individuals that make up the workforce development system within a local area. This policy also identifies and describes required agreements to ensure the local area serves as a jurisdiction for the administration of workforce development activities and expenditure of Workforce Innovation and Opportunity Act (WIOA) adult, dislocated worker, and youth funds allocated to LWDBs by the state. Jim also mentioned that the Chief Local Elected Officials could not vote because they are not voting members.

Dee stated that DEO policies, **Administrative Policy No. 091 and Administrative Policy No. 110**, require CSCR to submit the changes made to our local policies, which is required as a part of the DEO new process. In this new process, DEO requires that specific directives or policies be submitted for review and approval. And these particular policies that Jim is sharing with you will require the region to submit CSCR policies for the DEO approval. Therefore, if CSCR receives feedback from the DEO that changes need to be made, we will convene the Governance Committee to review and make the necessary changes to our policies.

Jim assured the Committee that once he hears from DEO on whether there are changes to be made and if DEO accepts CSCR policies, he will let the Governance Committee know. Jim stated that he did not have any further items to discuss with the Committee.

VIII. Adjourn

Chair Henderson thanked everyone for attending today and asked if anyone had any further questions before adjourning the meeting. There were none.

Meeting Adjourned at 4:26 PM.

Next Meeting

October 7, 2021

Request for Quote

Topic: Strategic Planning Retreat with CareerSource Capital Region Board Facilitation

Background: The CareerSource Capital Region Board of Directors is planning a full day retreat in January 2022.

Requirements:

The Facilitator must:

- Be familiar with the CareerSource Capital Region programs
- Be familiar with the Florida Chamber of Commerce 2030 plan
- Be familiar with the CareerSource Capital Region 4-year approved plan by DEO and CareerSource Florida.
- Capable of synthesizing the Florida Chamber 2030 plan in the workforce and education realm and applying the pertinent information to the required 2-year update of the 4-year plan.
- Have experience facilitating Strategic Thinking and Strategic Doing™ action activities to guide the Board (23 members) and the Local Elected Officials (3) in an effort to assess the current plan, compare to the 2030 plan, and assess the current economic conditions and forecasts to align the 2-year amendment to the 4-year plan.
- Provide samples of their previous engagements and the outcomes they measured and what was achieved.
- Be willing to work closely with the senior Board staff in preparation and execution of the aforesaid retreat.
- Provide a sample outline of the all-day meeting
- Provide a cost breakdown of preparation time, facilitation time, and follow up and report time.
- Provide a payment schedule based on the work completed.
- Provide the total cost if travel is expected. If the retreats needs to go virtual, any cost changes.

Timeframe: The response is due by September 30, 2021 at 5PM electronically to:

Matt.Salara@careersourcecapitalregion.com, and
jim.mcshane@careersourcecapitalregion.com.

Award notification will be by October 15, 2021 to give sufficient time to plan and execute.

PROPOSAL TO
CAREER SOURCE CAPITAL REGION
IN RESPONSE TO
Request for Quote for
Board Facilitation

SUBMITTED BY

JEFFREY MARCELLA
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773-391-2546
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JEFFREY MARCELLA, NON-PROFIT AND PUBLIC SECTOR CONSULTANT
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PROPOSAL TO CAREER SOURCE CAPITAL REGION FOR BOARD RETREAT
SEPTEMBER 16, 2021

TO: Jim McShane and Matt Salara, Career Source Capital Region
FROM: Jeff Marcella, Marcella Consulting Corporation
RE: Request for Quote for Board Facilitation

This proposal is submitted in response to the Career Source Capital Region's Request for Quote for Board Facilitation. I look forward to being considered for this project and to the opportunity to talk with you further about the project and my qualifications. I can be reached as needed at the contact information above in the header to this proposal.

A. **Qualifications and experience in facilitation of Board and organizational planning groups, including Strategic Doing.**

I am a self-employed consultant who has worked in a range of consulting roles with workforce boards, city and state workforce development agencies, non-profit organizations, community colleges and businesses since 2009. I work independently and in partnership with other consulting firms on a range of projects and have served more than 100 client organizations. I work from one office in Chicago, Illinois and am able to work remotely at client locations throughout the US.

Bringing a dozen years' experience in City government and another decade in the nonprofit sector, foundations and research/policy organizations, I offer my expertise and talents to support the work of nonprofit organizations, local government, associations and other firms, providing technical assistance with their strategic planning, program design and program management, organizational and professional development and public policy activities. My specialty is the workforce development and job-training arena but I am experienced in serving a wide range of organizations. Other particular skills are facilitation, public speaking and grantwriting.

In Chicago, serving as Director of Policy for the City of Chicago Office of Workforce Development, I led several successive strategic planning processes from 2004 to 2009. In each case, I facilitated a Strategic Planning Team which I led in a process of researching best practices around the country on key topics related to our work, followed by a topic-based discussion series of exploring the direction of the organization's focus on issues such as target populations, service strategies, industry targets and wider business service strategies, relationships with partners and so on. After the initial strategy series, I then led the group through a process of turning those various separate discussions into a more comprehensive Plan, including background, goals, objectives and specific tasks to be focused on, as well as a write-up describing the proposed future-state, based on that Plan. Finally, during key points during the Strategic Planning process, I led a series of all-staff meetings in relation to the process, updating them on the progress at several midpoints in the Strategic Planning process, as well as at the culmination, where I prepared content and coached my peer managers on tone and delivery of the new message. A key element in these staff sessions was ensuring that the tone was one of positive, forward-looking ideas and energy, and avoided concerns and fears common among staff and stakeholders. For all of these sessions, I developed the content as well as the corollary material and served as the main presenter, facilitating subject-specific presentations by peer managers and organizational leadership.

As a consultant, I have led strategic planning efforts for more than twenty workforce development entities, with my work focused on helping staff and organizations manage change, develop new strategies, and develop solutions and service models to meet organizational and community goals. These have included public sector projects for cities including Chicago, Washington, DC, Milwaukee, New Orleans and San Diego, the States of New Jersey, Missouri and Indiana, and multi-county workforce development areas in Illinois, New Jersey, Michigan, and

other states, as well as several Chicago area non-profits including the Jane Addams Resource Corporation and Youth Job Center of Evanston, IL. Each project has included a range of services including but not limited to:

- An external environmental scan of best practices, models, what peers or the competition have accomplished, and ideas for adoption by the client organization.
- An internal “360” scan of my client organization, including key informant interviews with internal and external stakeholders and staff to identify how the client’s program was faring in comparison to other similar projects, and what needs existed in the community that the client could and should fill.
- Facilitating a Board retreat or Strategic Planning Committee series of brainstorming and planning sessions to craft the eventual project or organizational plan, with a key role as reality-check, outside advisor, facilitator and arbitrator among formal and informal positions or perspectives within the internal team. These sessions were critical to project success, and my role included significant motivational elements and management of team dynamics in order to help maintain a strong and cohesive team, armed with tools and bonds that prepared them for undertaking the real work of the organization that would follow the planning process.
- Preparing a final project design and work plan for the new workforce system in the form of a Strategic Plan or Business Plan, with a mission, vision, goals, objectives and activities developed through the retreat or committee process and sharpened into a formal, public document.
- Preparing supporting materials to help leadership deliver the new message, project design and new ways of doing business to various audiences including peer organizations and internal staff who would be delivering the new projects or working within the new system.

In strategic planning and a wide array of other organizational development activities, my work has been highly praised by my clients and I have been proud to see the projects I begin, the plans I facilitate and the staff I train move forward in a manner that helped the organization grow and prosper.

I am experienced working in the **Strategic Doing** model, both through recent sessions hosted by Career Source Capital Region in support of the Workforce Alliance’s activities, and previously through a number of projects in my home area in Illinois. I am also pursuing becoming certified to deliver Strategic Doing sessions. I was registered to attend a session previously which was cancelled due to the pandemic, and am planning to attend an online course in January so may be in process with that at the time of this Retreat.

B. Qualifications and experience in working with workforce development organizations, including Local Workforce Development Boards AND CareerSource Capital Region/CareerSource Florida:

As noted above, workforce development has been the focus of my entire career. I started working at Chicago's Mayor's Office of Workforce Development in 1998 when I was brought on to help launch the Welfare-to-Work initiative, DOL-funded workforce programs that were central to welfare reform. While at the City I led the department’s launch of other key initiatives including being the first Workforce Investment Act coordinator, launching that program citywide in 2000. The Chicago system includes five major One Stops (American Job Centers) and more than 40 additional "affiliate" providers that deliver comprehensive WIA/WIOA services of case management, job counseling, job-readiness and referrals to training at the City's more than 100 Eligible Training Providers. As WIA coordinator and subsequently as the department's Director of Policy, I had close direct interaction and oversight with all of these organizations. I led development of Chicago's career pathway/"bridge" program models, and the nationally recognized “Sector Center” workforce hubs in manufacturing and the service industries.

While at the City I participated in a number of major national coordinating and networking efforts including serving as an officer of the Illinois Workforce Partnership and member of the Great Lakes Employment and Training Association (GLETA). Both organizations are coordinating membership entities of their respective workforce development boards (WDBs) and WIOA provider entities. Similarly, I regularly represented Chicago in events and projects of the National Association of Workforce Boards, United States Conference of Mayors Workforce Development Council and National Association of Workforce Development Professionals, where I presented several times at their annual convention. All these activities gave me a deep grounding in the field and close contact with WDBs and workforce programs around the country. As a consultant, I have conducted a range of projects in strategic planning to WIA/WIOA Plan development, system building, and professional development. I have served state programs for Wisconsin, Illinois, New Jersey and Tennessee, and more than two dozen local WDBs and Regions on a range of projects. Because of the range of entities I have served, I am conversant with all of the permutations of WIA/WIOA around the country from small boards with one One Stop to multi-center, multi-partner operations like Chicago or New York. Recent projects in Illinois, where I provided technical assistance and professional development to several merged Workforce Areas and their Local collaborative, to New Jersey where I partnered to write the Local Plans for the state's three Workforce Regions, have expanded my work in putting together local partnerships and helping local areas work collaboratively across their region.

Recently, I have been quite immersed in work in Florida and in the CareerSource system. The CareerSource Capital Region team know about my work with the Florida Georgia Workforce Alliance (now the Workforce Alliance). With my partner firm EDSI, I delivered a comprehensive industry-sector workforce strategy for this network of six local workforce development areas encompassing more than 60 counties across two states. I conducted local assessments of each area's current economic situation, business climate, labor market, workforce, and worker training and education initiatives. And we convened workgroups of the six-area network to consider current regional and local strengths, identify areas of commonality, and build a comprehensive industry sector-based workforce strategy to prepare workers in the cross-state region for in-demand occupations with area businesses. In that work I gained real expertise in the needs and situations of the Capital Region and the Florida situation. More recently I have recently begun working with another partner on a project to develop new curriculum and strategies in several industries in support of higher education for the Florida Consortium of Metropolitan Research Universities. Through my work, I am familiar with Career Source Capital Region's 4-year Plan and updates, and am actually now in the process of re-reading all of the materials you mention including the Chamber's 2030 Plan. I have regularly taken on new projects to not only do strategic planning but to focus on updates to State, Local and Regional WIOA Plans, so am quite confident I can successfully synthesize the materials, lead the Board retreat and support drafting the local Plan update.

C. Methodology:

My vision for managing a local or Local workforce plan is to coherently and comprehensively assess the existing situation in the Capital Region Workforce Development Area; provide guidance based on legislation, regulations and other external requirements as well as national and local best practices toward development of a strong Strategic Plan; and engage the Local board, staff, system partners and community in understanding the plan and gaining broad affirmation of its content and elements.

As noted above, I bring state-level expertise and experience as a local practitioner within the workforce system, so will consistently help ground your strategic ideas and goals in the reality of the national and local situation. Each project consists of three activities:

- ANALYSIS: Collect and analyze quantitative and qualitative data to understand current activities and historical trends to inform the planning process.

- ALIGNMENT: Review current assets, challenges, and opportunities to determine objectives with measurable goals and defined action items.
- ACTION: Build internal consensus around the plan and identify and pursue resources to support implementation.

D. Work Samples

Two Strategic Plans that resulted from my work facilitating similar convenings to this Board Retreat are attached, including:

- Illinois Northeast Economic Development Region. I facilitated a series of discussions among workforce board, committees and One-Stop Partners that resulted in the most recent Regional Plan for the Northeast Economic Development Region. The region continues to be successful and maintains a strong partnership, formalized through the Workforce Partners of Metropolitan Chicago, a nonprofit convened to continue the work of the Regional partnership. The Plan is attached.
- Jane Addams Resource Corporation (JARC), a WIOA-funded workforce agency and manufacturing trainer. I regularly facilitate and lead drafting of JARC’s four-year Strategic Plan, and my work includes leading external research (documents, websites, interviews with key stakeholders and experts, and more) on best practices and an organizational “360 degree” analysis, a multi-session board and staff strategic planning discussion series, and working together to draft a final Plan. That Plan is attached.

E. Sample Outline of Board Retreat

As with any project, I would work closely with the project leadership to develop a final agenda prior to the meeting, and am happy to adapt any structure to meet the needs of the client. In this case, for a one-day Board Retreat, I recommend some level of pre-work or homework that will make for the most productive meeting, and of course follow up.

Time (estimate)	Activity and Format	Roles
Pre-Session Planning Meeting	Discussion of leadership group to plan the Retreat. Decide on nature of breakouts, topic categories for discussion groups, agenda and confirm flow of the day.	CareerSource Capital Region leadership and Marcella
Pre-Work	All attendees review a packet of background materials provided by consultant and CareerSource Capital Region leadership. Expectation is group is ready to hit the ground and have also made some initial decisions about which breakouts they will attend.	Marcella, CareerSource Capital Region staff/leadership
Retreat day. 8:30 to 9:00am	Gather, refreshments (if CareerSource Capital Region normally includes this)	CareerSource staff
9:00am	Introductions and Goals for the Retreat	CareerSource ED, Marcella
9:15am	“Icebreaker” and Promoting Big Ideas I have several options for this but know client leadership often have strong ideas about the nature and form of these. I will defer but bring several options to a first meeting	Marcella

<p>9:45am to 10:15am</p>	<p>First Session. Report on current state of achievement of Goals in the Local Plan. Discussion of main categories of goals and priorities for the Plan renewal and future two-year period. These can be taken from the current Goals and include content related to:</p> <ul style="list-style-type: none"> • <i>Integrated Service Delivery and Effectiveness</i> • <i>Attract, Develop and Retain Top Talent</i> • <i>Improve Community Partnerships and Community Engagement/Awareness</i> • <i>Grow Funds</i> • <i>Expand Work-Based Learning</i> • <i>Expand Business Customer Awareness, EDO Partnerships.</i> <p>Additional Categories may include (based on other current topics relevant to all areas and already in progress with Career Source Capital Region):</p> <ul style="list-style-type: none"> • <i>Broaden partnerships with other workforce areas (including through The Workforce Alliance).</i> • <i>Expand and Enhance Holistic Job-Seeker Services</i> • <i>Develop/Enhance Sector Strategies</i> 	<p>Marcella to lead. All Participants Discussion</p>
<p>10:15am to 10:30am</p>	<p>Short Break</p>	
<p>10:30am to 11:15am</p>	<p>Full Group Working Session on One Sample Goal/Topic and Action Plan.</p> <p>We will pick (ahead) one of the Goals and walk through a Strategic Doing format session to identify a few key sub-goals, actions, outcomes and next steps for the Board and the Workforce Area to pursue in relation to that Goal.¹ Process to include:</p> <ul style="list-style-type: none"> • Frame a question • Identify Assets • Leverage Assets into Strategic opportunities • Identify “Easy” quick wins and other key Actions • Develop Measures for each • Identify one Action and build it out including timeline, guideposts and immediate next steps for the next 30 days. 	<p>Led by Marcella and CareerSource Capital Region leadership. Other Roles: Scribe Timekeeper</p>

¹ Please note, I am not yet certified in Strategic Doing but plan to be attending a January training, in which case this project will use the methods and serve as a working session for my certification process. If another participant in this Retreat is certified, we will collaborate to co-lead. Otherwise I will use a format similar that I have already delivered in the past that uses the same key insights and ideals of practical, action-oriented, rapid and engaged discussion – a “doing” approach.

	<p>The great benefit of this is the expansion of an action-oriented Board, not one that merely reviews, recommends and approves work done by the organization.</p> <p>Many Actions will also of course have a longer timeframe and bring in the expertise and work of the entire local workforce area.</p>	
11:15 to 12:15	<p>First Breakout and Action Development. Attendees break out into separate working groups based on the Goals/Topics identified (which will be drawn from sample list above and finalized in pre-work by Marcella and leadership).</p> <p>We will work on about half of the main topics in the First Breakout Session and work on the other half during the Second Breakout. Groups based on interest or other assignment.</p> <p>Activities of the First Breakout Session will include the same process as undertaken as a full-group in the immediately prior session.</p>	<p>All Participants in Breakouts.</p> <p>Led by volunteered or identified table leads per breakout. Scribe Timekeeper</p> <p>Marcella “float” to support discussions</p>
12:15-1:15pm	Lunch Break	
1:15pm to 1:45pm	<p>Debrief of First Breakouts. Present insights gained Rapid-fire Q&A for sharpening ideas Bring in additional resources as appropriate Rank Actions for priority for the future plans of the organization.</p>	Marcella, all
1:45pm to 2:30pm	<p>Second Breakout. Same process as First Breakout, working through the remaining Goals/Topics in mixed groups based on interest or other assignment.</p>	<p>All Participants in Breakouts.</p> <p>Led by volunteered or identified table leads per breakout. Scribe Timekeeper Marcella “float” to support discussions</p>
2:30 to 2:45	Short Break	
2:45 to 3:15pm	<p>Debrief of Second Breakouts. Same as First Debrief.</p>	
3:15pm to 4:00pm	<p>Closing Discussion:</p> <ul style="list-style-type: none"> • Further Group Discussion TBD based on identified Goals, Actions, issues. • Other Discussion for the good of the Board and CareerSource Capital Region. • Identifying roles for drafting the Plan update • Other “to do” and “next steps.” 	Marcella, CareerSource Capital Region Leadership.
4:00pm	Adjourn	

JEFFREY MARCELLA, NON-PROFIT AND PUBLIC SECTOR CONSULTANT
 MARCELLA CONSULTING CORPORATION
 773-391-2546 JEFFMARCELLA@GMAIL.COM
 PROPOSAL TO CAREER SOURCE CAPITAL REGION FOR BOARD RETREAT
 SEPTEMBER 16, 2021

All aspects of this timeline are obviously adaptable and flexible based on your needs and situation. I have delivered a broad array of formats, content and models of strategic planning meetings and retreats so am happy to revise according to what will work best for your group.

F. Proposal Cost:

I am unclear from your RFQ if you require support in writing the entire two-year update to the four-year Plan and what level that requires. I have included a breakdown in the Budget section for several options and all cost estimates are negotiable.

All projected costs are based on the expected time I envision for each element, based on prior experience of similar projects. I estimate only the Retreat will require me to be on-site, though if you recommend additional visits I am happy to discuss that with your group.

Project Element	Estimated Time	Cost
Initial Planning and discussions with CareerSource Capital Region staff. Preparation and discussion of any pre-work/research and planning. Finalize Board Retreat agenda. Project management and team prep/follow-up.	4-8 hours	\$1200
Support preparation of invitation/summary and background materials to send to attendees. Preparation of background materials for session. Any other logistical support needed. <i>(*If significant primary research, analysis or working/presentation papers are required, additional cost may be incurred.)</i>		\$800*
Facilitation of <u>Retreat</u> of the Career Source Capital Region Workforce Development Board and elected official members. Includes full on-site time including any pre-work or follow up that day or perhaps day before/after.	One day on-site plus on-site portion of day prior/ following as needed and travel.	\$2500
Local Plan Development: Writing, communication with writing team and Partners, Plan drafts. Plan editing. Production of final product. I am unclear if CareerSource Capital Region requires this support. This estimate amount is not included in the total but could range up to approximately \$5000 or more for a Plan update if significant support is required.	Hours TBD. Flat fee based on reasonable estimate of time.	<i>(Approximately \$5000 if needed. Amount not included in total).</i>
Travel. Airfare, hotel, local transportation. One or two overnights depending on schedule and logistics of air travel.		\$800
Total		\$5300

I am pleased to submit this proposal to the Career Source Capital Region. I am reachable at 773-391-2546 or jeffmarcella@gmail.com if you have any further questions.

Thank you,

JEFFREY MARCELLA, NON-PROFIT AND PUBLIC SECTOR CONSULTANT
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773-391-2546 JEFFMARCELLA@GMAIL.COM
PROPOSAL TO CAREER SOURCE CAPITAL REGION FOR BOARD RETREAT
SEPTEMBER 16, 2021

A handwritten signature in black ink, appearing to read 'Jeff M', with a long horizontal flourish extending to the right.

Jeffrey C Marcella
NonProfit and Public Sector Consultant
Marcella Consulting Corporation



Fairman Consulting

Strategy First | Planning
Branding
Marketing

1015 Atlantic Boulevard > Suite 262
Atlantic Beach, Florida 32233

CareerSource Capital Region

Strategic Planning and Retreat: A Proposal

Presented to: Jim McShane
Matt Salera

September 30, 2020

Project Overview

Big Bend Jobs and Education Council, Inc. d/b/a CareerSource Capital Region (“CSCR”) has asked Fairman Consulting, Inc. (“Fairman”) for a proposal to provide services to deliver a full-day strategic planning retreat for the region’s board of directors and senior staff in January 2022.

We suggest that the retreat will be the centerpiece of an integrated planning process, and that the process itself will deliver outcomes into an actionable strategic plan.

Fairman has worked with leadership of CSCR in many ways, including as the facilitator of the Florida Workforce Development Association and Florida Workforce Development Chairs Association statewide leadership meetings for several years, and as the lead consultant for The Workforce Alliance serving North Florida, South Georgia and Southeast Alabama, which was founded and chaired by Jim McShane, since 2019.

Fairman has also conducted strategic planning for a dozen Florida workforce boards, many economic development organizations, chambers of commerce, city and county governments, and public and private high schools, colleges and universities.

Fairman also is familiar with the Florida Chamber Foundation’s 2030 plan including experts in two of The Workforce Alliance virtual events, working with its objectives and projections not only with the state workforce system but also in an additional current project with the Florida Prepaid College Foundation, which tracks its outcomes to the 2030 objectives.

Our team has experience with executing several strategic planning processes, including the Strategic Doing™ Agile leadership model. We will follow the Strategic Doing methodology in preparation, facilitation and recommendations/actionable plan.

For CSCR’s planning process, Fairman will:

- Review CSCR’s four-year Department of Economic Opportunity/ CareerSource Florida approved plan and be familiar with its contents
- Review the Florida Chamber Foundation’s 2030 plan in context with the CSCR plan and identify areas of opportunity
 - Compare and contrast other Florida regional LWDB plans developed by Fairman since January 2020 and identify additional learnings that apply

- Outline the strategic planning process and develop objectives and success metrics for CSCR
 - The process focuses on the retreat, and also includes an actionable plan deliverable
- Work with staff leaders to identify the retreat meeting venue and January date and make sure everyone has it on their calendar
- Develop a comprehensive project plan, scope and timeline
- Conduct an initial virtual planning session with CSCR senior staff to confirm key objectives... review and update retreat inputs/agenda/ plan/outcomes
- Prepare a final retreat agenda and provide materials to all participants in advance
- Facilitate the retreat
- Develop a meeting summary of the verbatim comments from the retreat
- Create a draft of directional strategic recommendations
- Synthesize the recommendations, goals and action items in the Chamber's 2030 plan within the context of enhancing and improving CSCR's two-year update to the four-year state plan
- Publish the final recommendations with prioritized action items, and deliver tactical suggestions for implementation

Examples of Successful Planning Engagements

Below are a handful of strategic planning projects and a summary of their scope and impact. There is additional information on each of these and dozens more for your review as needed.

- **Habitat for Humanity International.** A five-continent strategic development project to stabilize fundraising and branding issues worldwide. (Additional documentation on this project later in this document)
- **CareerSource Flagler Volusia.** Utilizing the Strategic Doing™ process, we created an actionable plan for the workforce board, partners and senior staff.
- **CareerSource Northeast Florida (previously WorkSource).** Strategic planning developed a new organizational market position (in 1999) and subsequent board-involved processes over the next two decades continued to keep CSNEFL as a market leader. (Additional documentation on this project later in this document)
- **Nonprofit Center of Northeast Florida.** Led a team to establish the first-ever nonprofit advisory group on the First Coast, including establishing in-house service offerings... staffing and pricing methodologies... and key partnerships
- **CareerSource Suncoast.** Two strategic plans developed over the last six years with key measurables have guided the LWDB to a position of leadership in the two-county region
- **Jacksonville Chamber of Commerce/Career Academies.** The first-ever guidebook in the USA for starting, running and succeeding in a Career Academy was developed by an internal team led by Fairman
- **The Workforce Alliance (previously Florida Georgia Workforce Alliance).** After initial research, Fairman led a team that expanded a six-region cross-border workforce partnership to nine regions representing 76 counties in three states. The continued expansion is allowing for more projects and measurables
- **Jacksonville Transportation Authority.** The organization spends more than half of its revenue on construction (bridges, roads) yet was positioned as a bus provider. A multi-year strategic planning process allowed the organization to move from only a transit provider to a community leader in serving people with new opportunities to get places

- **MyFlorida.com**. Under Governor Bush, the State created its first Technology Office. Fairman conducted strategy sessions with statewide opinion leaders and partners and delivered the initial personalized citizen access website
- **Florida Workforce Development Association**. Three years of bi-annual planning led by Fairman kept the organization advancing its statewide advocacy and organizing internal opportunities for success
- **Jacksonville University Public Policy Institute**. The PPI was expanding its board and fundraising activities. Fairman guided senior staff toward a new strategy based on national best practices that caused an immediate increase in student enrollment and revenue
- **Museum of Contemporary Art Jacksonville**. With a building full of contemporary art and new leadership, the museum was struggling with its vision and mission. Our team guided JMOMA (Jacksonville Museum of Modern Art) to a new branding and strategic market position more in line with its authenticity
- **Career Edge**. The Gulf Coast Community Foundation began an initiative to establish the first (and still only) private workforce board in Florida. The Foundation called on Fairman to work on the design committee and integrate organizational goals with market needs, and align key partners

Examples of Previous Retreat Agendas

We have provided strategic planning for dozens of clients, and as requested, the information below provides two outlines for a successful one-day retreat for clients.

We will obviously develop a detailed agenda for CSCR after we engage in this project. These examples do not reflect the agenda for CSCR's planning, as it will be developed based on specific needs and other planning elements. We also included a working guide to the work that we have been successful doing in a single day of planning.

Timing	Topic
8:30-9	Breakfast, Fellowship & Photos
9-9:20	Welcome
9:20-10:20	Vision – It's January 1, 2030. The organization is very successful. What does success look like? How did you get there?
10:20-11:20	The organization Today – Discussion <ul style="list-style-type: none"> • Finances, staff, board, alignment with partners, state, etc.
11:20-11:45	Break
11:45-12:45	SWOT analysis
12:45-1:30	Lunch
1:30-3:00 Includes a break	Priority Actions & Goals for the next 12 months <ul style="list-style-type: none"> • Add a break in here • Who owns these? Board roles in these? • What's priority order? <p><i>May be shorter with working lunch & subsequent pieces earlier</i></p>
3:00-3:20	Next Steps
3:20-3:30	Closing & thanks

CareerSource Northeast Florida
Senior Staff Visioning Session
Meeting Agenda

- Welcome & Introductions Rebecca Livingston, Group

- Confirm project scope, draft schedule Larry Fairman
 - Tools
 - Surveys
 - Benchmarking
 - Opinion leader interviews
 - Databases
 - Employers, partners, job seekers, benchmarks, opinion leaders, staff
 - Distribution strategy/methodology/channels

- Review summary of work to-date Larry
 - Big themes
 - Team reactions/feedback

- Group discussion Larry, Darrin Finley, Julia Burns
 - How has the way we do business changed?
 - What new things are working? What should be sunset?
 - New best practices we know about
 - What are the research meta questions (what should learn from folks?)
 - Who are the national peers, regional opinion leaders?
 - What should we do next?
 - Other brainstorming/idea generation

- Next steps Rebecca, Larry
 - Assign accountabilities
 - Databases, online platform(s), preferred tools (e.g. SurveyMonkey)
 - National peers to benchmark
 - Opinion leaders list
 - Schedule next meeting(s)

.....

Initial Planning Session
CSFV Boardroom
December 17, 2019 9:00-10:30a

Participants:

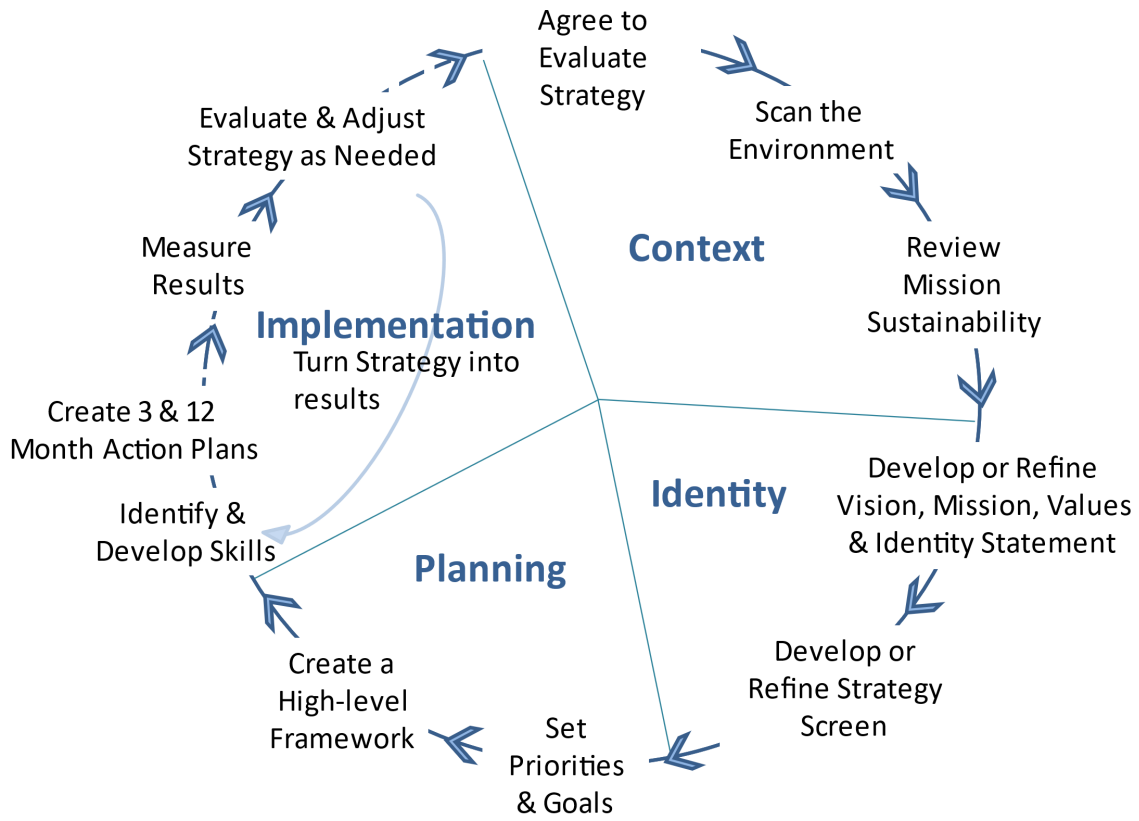
- Nancy Bradley
- Jennifer Campbell
- Barbara Girtman
- Charlie Howell
- Robin King
- Ann Lesizza
- Joe Mullins
- Bret Schmitz
- Christine Sikora
- Cheryl Tanenbaum

Facilitators:

- Larry Fairman
- Darrin Finley

Agenda:

- | | | | | |
|---|----------|--|---------------------------|----------------------|
| • Welcome and Introductions | | | | Robin King/Group |
| • Overview of mission, vision, strategic goals | | | | Robin |
| • Review project scope, objectives | | | | Larry Fairman |
| • Discussion of board priorities | | | | Larry, Darrin Finley |
| ○ Re-affirmation of mission, vision | | | | |
| ○ Review/re-establish strategic goals, activities | | | | |
| • Next steps | | | | Larry |
| • Review project schedule | | | | Robin |
| ○ January 7 | 9-10:30a | | Strategic Doing Group | |
| ○ January 16 | 3-6p | | Board/Committees planning | |
| ○ January 30 | | | Summary report | |
| • Adjourn | | | | Robin |
-



The Firm

Larry Fairman started a communications company in the 1980s. The firm transitioned into a consultancy in the mid-1990s, providing business, branding and marketing strategy. Larry continued to serve as CEO as the company evolved into The Boardwalk Group in 1999. The Boardwalk Group became well known throughout Florida and the Southeast as an early innovator in the integration of marketing and technology solutions, at one time employing 40 team members in a signature oceanfront office building along the boardwalk in downtown Jacksonville Beach. The company was sold in 2003 to focus on a new client-service approach.

Fairman Consulting was formed in January 2004 to deliver high-value strategic business consulting services. The company provides strategic direction and action-oriented solutions to business challenges.

Strategic Planning Services:

- Developing or re-affirming vision, mission, objectives, strategies
- Strategic plan development
- Business planning
- Organizational development
- Process improvement
- Project management
- Brand development and brand management
- Marketing strategy
- Market research
- Pricing methodology
- Product rollout
- Event planning
- Oversight of implementation activities

Using our proprietary process, we have provided effective strategic planning services for hundreds of organizations, products and people. Our deep experience with workforce development and education has helped create success for a myriad of clients.



Larry Fairman

As a nationally known strategist with over three decades of experience, Larry has helped hundreds of organizations, businesses and people develop powerful strategic plans, brand identities, positioning strategies, marketing plans, and creative and technology programs.

Larry has served clients in many industries, with a primary focus on workforce development and education. He has created and executed strategic plans for a dozen Florida workforce boards... the Florida Workforce Development Association... the Florida Workforce Chairs Association... The Workforce Alliance serving North Florida, South Georgia and Southeast Alabama... Florida Prepaid College Fund... numerous public and private school districts, colleges and universities... and many more nonprofit organizations.

Larry has been involved as a thought leader and strategic partner for workforce boards across the Southeast for more than two decades. **For CareerSource Capital Region, Larry will develop the retreat planning agenda, facilitate the retreat discussions, and provide an actionable strategy for the CSCR board to implement.**

Larry is a recipient of the Outstanding Communications Alumnus from Jacksonville University, where he earned his BA, and the Bronze Leadership Award from Junior Achievement. He participated in the Leadership Jacksonville Class of 1994 and co-founded the JU Athletic Foundation. Larry has been a chairman, executive committee member and trustee of over two dozen nonprofit and community organizations. He was a primary catalyst in the development of JaxWIZ, a series of free public Wireless Internet Zones in Jacksonville's urban core, and currently serves in leadership roles with the Talent Advancement Network, Level the Playing Field Leadership Academy and Deck the Chairs.

Larry and Christine live in Jacksonville with their son Gunnar, 18. Their daughter Gentian is a sophomore at Wake Forest University.



Darrin Finley

Darrin began his consulting firm in 2004 based on his passionate belief that management and leadership excellence are essential for organizational success across all industries.

Guided by the principles of noted business thought leaders such as Drucker, Deming and Covey, Darrin developed a proprietary process that serves as the foundation for his consulting service offerings. These include strategic planning, marketing planning, organizational development and design, operational improvement and performance management... with an emphasis on improving organizational productivity, customer service and diversity.

For CareerSource Capital Region, Darrin will coordinate the retreat logistics, support project management and assist with strategic plan development.

Prior to forming his consultancy, Darrin served as a senior executive in industries ranging from banking to hospitality with both private and public companies. He has been recognized for his leadership and his expertise in operations improvement and organizational development. An accomplished financial manager, Darrin has managed multi-million-dollar budgets, provided leadership for large administrative production staffs, and played key roles in developing long-term strategies to improve efficiency and increase revenue.

Darrin received his Bachelor of Science degree in Industrial Management from the Georgia Institute of Technology and his Master of Business Administration from Jacksonville University. He also completed the advanced management program for executive development at Duke University's Fuqua School of Business.

A native of Birmingham, Darrin was raised in Atlanta. He currently lives in Jacksonville, where he has served as a board member for organizations such as Learn to Read, The Jacksonville Public Library Foundation and We Care Jacksonville. He is also a volunteer coach for I-9 and Jacksonville First Coast Soccer Association.

Representative Clients

Fairman Consulting has provided strategic business, branding, marketing and communications consulting services to a broad array of local, regional and national organizations. Here is a representative sample.

Workforce Development

- Bright Ideas on the Gulf Coast (BIG), Sarasota, Florida
- CareerSource Northeast Florida
- CareerSource Suncoast
- CareerSource Southwest Florida
- Career Academies, Northeast Florida
- The Center for Workforce Leadership, Northeast Florida
- Florida Workforce Chairs Association
- Florida Workforce Development Association
- FloridaWorks, Gainesville
- The Workforce Alliance
(North Florida, South Georgia, Southeast Alabama)
- Workforce Alliance, West Palm Beach
- Workforce Escarosa, Pensacola
- WorkSource, Northeast Florida



Education

- Alliance for WorldClass Education, Jacksonville
- Charlotte School of Law
- Duval County Public Schools
- Florida Chamber of Commerce (WorldClass Schools), Tallahassee
- Florida Coastal School of Law, Jacksonville
- Florida State College at Jacksonville
- The Greenwood School, Jacksonville
- Jacksonville University Athletics
- Jacksonville University Aviation
- Jacksonville University Davis College of Business
- Jacksonville University Public Policy Institute
- Jacksonville Public Education Fund
- Phoenix School of Law (now Arizona Summit)
- St. Johns County School District
- Talent Advancement Network, Northeast Florida





Nonprofits

- The Community Foundation for Northeast Florida
- daniel, Northeast Florida
- Gulf Coast Community Foundation, Venice, Florida
- Habitat for Humanity International, Atlanta
- Helping WIN (Women in Need), Northeast Florida
- Junior Achievement of Jacksonville
- Kesler Mentoring Connection, Jacksonville
- Level the Playing Field Leadership Academy, Jacksonville
- Museum of Contemporary Art Jacksonville
- Nonprofit Center of Northeast Florida
- Turning Points, Bradenton

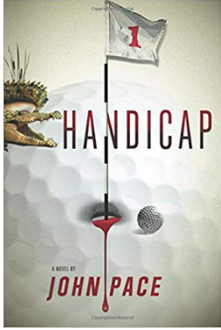
Technology

- Availity, Jacksonville
- Desert Micro, Jacksonville, Houston, California
- e-Zassi.com, Amelia Island
- Gyrx, Jacksonville
- Jacksonville Wireless Internet Zones (JaxWIZ)
- Microline PENTAX, Beverly, Massachusetts
- OnDefend Cyber Security, Jacksonville
- OOZZZero, Rome, Italy
- Pelocity LLC, Jacksonville

Government & Other Agencies

- Agency for Healthcare Administration, Tallahassee
- Florida Office of the Governor (State Technology Office), Tallahassee
- Florida Prepaid College Foundation, Tallahassee
- Florida Ready to Work, Tallahassee
- Jacksonville Port Authority (JAXPORT)
- Jacksonville Transportation Authority
- Jacksonville Wireless Internet Zones (JaxWIZ)
- Jacksonville Women's Business Center
- JAX Chamber
- JAXUSA Partnership (formerly Cornerstone), Jacksonville
- South Florida Water Management District, West Palm Beach
- Visit Jacksonville (Jacksonville & the Beaches CVB)





Consumer Products & Retail

- AeroGlove
- Americanna Laboratories
- Atlantic Beach Urban Farms
- Bono's Bar-B-Q & Grill, Florida/Georgia
- Clean Shower
- Fairman's Thrash & Threads, West Chester, Pennsylvania
- Handicap, The Novel by John Pace
- Homestead Villages, Florida, Ohio, Massachusetts

Healthcare

- Atlantic Eye Institute, Jacksonville Beach
- Aurora Advisory Group, Ponte Vedra
- Availity, Jacksonville
- Baptist Health System, Northeast Florida
- Crucial Care, Jacksonville & Atlantic City
- GuideWell Health, Florida
- Jacksonville Heart Center
- Jacksonville Orthopaedic Institute
- NationsHealth, Sunrise, Florida
- Wolfson Children's Hospital, Jacksonville
- Zassi Medical Evolutions, Fernandina Beach

Professional & Financial Services

- ALLTEL Residential Lending Services, Jacksonville
- Brower Financial Group, Ponte Vedra Beach
- Community First Credit Union of Florida, Jacksonville
- Ford Miller & Wainer, P.A., Jacksonville
- Madison Property Solutions, Jacksonville
- Milam Howard Nicandri Dees & Gillam, P.A., Jacksonville
- NELnet, Lincoln, Nebraska
- Potentiae, Jacksonville





Manufacturing & Logistics

- APL Logistics, Oakland and Jacksonville
- Americanna Laboratories, Jacksonville
- Crowley, Oakland
- Florida Petroleum, Fernandina Beach
- Guardian Fueling Technologies, Jacksonville
- SaniGLAZE International, Jacksonville
- Sea Star Line, Jacksonville
- USG Corporation, Chicago



Real Estate Development & Homebuilding

- Amelia Park, Amelia Island
- Arthur Rutenberg Homes, North Florida
- Atlantic Builders, Jacksonville
- Cecil Commerce Center, Jacksonville
- ForSaleByPlus, Northeast Florida
- LandMar Group, Jacksonville
- Legendary, Inc., Destin
- Marsh Creek Country Club, St. Augustine
- Nocatee, Northeast Florida
- OakLeaf Plantation, Northeast Florida
- Orange Park Country Club
- The PARC Group, Northeast Florida
- The Pineapple Corporation, Jacksonville
- Regency Centers, Jacksonville
- St. Joe Corporation, Northeast and Northwest Florida
- Vista Ponte Vedra, St. Johns County



Examples of Client Success



Habitat for Humanity International (HQ: Atlanta). Fairman led a project team that developed an international fundraising and global resource integration strategy. The process included 150 in-person, facilitated sessions and interviews on five continents—reaching key donors, cabinet volunteers and leadership staff. Also, hundreds of global directors from 64 countries provided insight into opportunities for leveraging resources and improving results. Global peer benchmarking provided a look at best practices. The outcomes included the creation of an international resource deployment strategy... a donor pyramid plan to align funding streams...and a tactical approach to leverage skills across multiple countries to maximize fundraising results.



Atlantic Beach Urban Farms. Atlantic Beach Urban Farms is part of a growing national movement to solve the problem of food deserts in America. Their mission is to be a leader in the local food growing movement and to inspire people to grow their own nutrient-dense food locally. The organization developed an aeroponic farm that serves restaurants, families and nonprofits. Fairman worked with the founders to develop a strategic plan and brand platform, and a framework for an effective organizational structure. We also work with leadership on communications strategy and implementation.



Clean Shower (Current owner: Arm & Hammer). Invented in a garage, this product created an entirely new retail category (daily shower cleaners). Fairman developed the entire launch strategy—from branding and positioning... to pricing and distribution... to national marketing and merchandising—finding grocery shelf space where none existed previously. Clean Shower defined a new niche that gained significant national competition. As the category expanded globally, the founders sold the company to Arm & Hammer for a significant profit. The original brand platform remains nearly intact over a decade later.



Where Breakthrough Ideas Hatch

Zassi Medical Evolutions (Current owner: Hollister). A small entrepreneurial company developed a product breakthrough in bowel management systems. In order to monetize the product globally, the company enlisted Fairman to build a brand platform; international marketing strategy; advertising and public relations plan; and pricing methodology. The product was sold to Hollister after several years of development, branding and marketing success.



AccuStaff (Currently Adecco). Four regional staffing agencies merged to create a billion-dollar company. Fairman developed a two-year national subsidiary brand strategy that leveraged the four existing brand identities while integrating into a new national brand. The company eventually went public and is currently part of the global conglomerate Adecco.



daniel (Jacksonville). Florida's oldest child-serving nonprofit was having difficulty communicating with target audiences, mostly because its name (Daniel Memorial) suggested a different message than "serving kids." We changed the brand name (lowercase "d" and no "Memorial"), positioning ("Improving the odds for kids"), logo and colors to better reflect its core mission. Public awareness and more importantly, fundraising, have increased significantly.



Nelnet (HQ: Lincoln Nebraska). The national provider of educational finance solutions acquired InTuition, a billion-dollar competitor. Fairman conducted national name recognition research and developed a brand transition strategy that preserved customer relationships for both companies post-merger, and paved the way for additional expansion and profit.



Community First Credit Union (Florida). This three-phase, 14-month process began with market research to determine if the brand platform was communicating to all constituencies of this \$1 billion asset company (originally known as Educational Community Credit Union). Research showed clearly that potential members thought they had to be an employee of a school district to participate, which was not accurate. A comprehensive process to reposition the nonprofit included additional research to review potential names and positioning strategies. The final brand program included a new name and market position... graphic and style standards... and implementation support (making sure the change was successfully integrated throughout the organization).



WorkSource (Northeast Florida). First Coast Workforce Development, Inc. was created in the late 1990s as one of 660 newly created regional workforce boards. The government-funded nonprofit originally positioned itself as FCWD. We were engaged to help understand how the organization was perceived in the market (initial name recognition was below 3%). Our team developed the WorkSource brand, which became very well-known regionally and statewide, and the company has received multiple national recognitions, generally acclaimed as one of the top 20 organizations among its national peers. (Note: WorkSource is now CareerSource Northeast Florida)

References

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References

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The Community Foundation in Jacksonville

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Estimate of Cost and Schedule

Schedule

- October 15 Contract executed
- November 15 Review of all documents
Finalize retreat date/location/cost
Staff planning meeting (virtual)
- December 15 Planning project plan/scope/timeline complete
Final retreat agenda
Advance materials ready for participants
- January (TBD) Conduct retreat
- February 1 Meeting summary of the retreat verbatim comments
- February 15 Draft of recommendations
- February 28 Final strategy with prioritized action items
Tactical suggestions for implementation

Cost

- Services \$7500
 - Preparation \$2000
 - Facilitation \$3000
 - Report \$2500

- Hard costs NTE \$1500
 - Travel
 - Mileage from Jacksonville, two hotel nights*
 - Meeting venue (if needed)
 - Lunch, hospitality
 - Production
 - Printing, etc.(if needed)

**If conditions require online and not in-person, travel costs are zero*

Approval and Authorization

We have proposed an engagement with Big Bend Jobs and Education Council, Inc. d/b/a CareerSource Capital Region (“Client”). The estimate of costs and the corresponding schedule detail the expected scope of work and timeline. Approval below indicates that Client will engage Fairman Consulting in the activities described in the attached proposal, and that Client has a complete understanding of and full agreement with these terms. When you choose to proceed with the project, we will present an invoice for one-half of the total service fee. The remainder of the service fees and any hard costs will be invoiced at completion of the project.

For requested changes that deviate from this estimate, Client will be given specific change order documentation. If project is terminated prior to completion of all work, all services incurred to date will be billed.

Please read and sign below, indicating approval and authorizing the engagement to begin:

Jim McShane, CEO

CareerSource Capital Region

Date: _____

PROPOSAL FOR:
**STRATEGIC PLANNING AND
RETREAT FACILITATION
CAREERSOURCE CAPITAL REGION**

Deadline: September 30, 2021

SUBMITTED TO:

CAREERSOURCE CAPITAL REGION

SUBMITTED BY:



Proposal Contact:
Nithya Pramekumar, Senior Project Consultant
Email : npramekumar@tpma-inc.com
Phone: 803-900-0199

STRATEGIC PLANNING EXPERIENCE

Firm Overview and General Approach

Founded in 1989, TPMA has a long and rich history of strategic planning experience partnering with public, private, and nonprofit organizations. Our general approach involves informing decisions with data, research, and evaluation; securing funding for initiatives; and implementing strategies for organizational growth. Through more than 32 years in business, TPMA has worked with numerous workforce and economic development stakeholders to include workforce development boards, economic development organizations, chambers of commerce, nonprofits, educational institutions, and private businesses in more than 40 states. This work also includes previous planning with the Southeastern Employment and Training Association, the National Association for Workforce Development Professionals, the National Association for State Workforce Agencies, and others.

Our emphasis is not just on strategic ideas, but strategic leadership and action-oriented goals – helping leaders identify data-driven opportunities and mobilize resources for implementation. We take a collaborative approach to research and planning, recognizing that the greatest impact is accomplished through the aligned goals of an organization and its stakeholders.

We engage in all aspects of the talent ecosystem, including fostering industry and community buy-in for planning efforts, local consensus building, and stakeholder engagement. We design plans that address short-term workforce challenges and long-term opportunities. We stress the involvement of education and workforce development partners, strengthening their connections with business and industry.

TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. In keeping with that vision, we empower communities and organizations through strategic planning and informed solutions that create positive, sustainable change. TPMA brings a practitioner’s approach to strengthening the alignment and delivery of workforce services. Members of the TPMA team are subject matter experts in strategic planning and workforce development and are strong advocates for a systems approach to implementing workforce and economic development solutions.

Related Experience

TPMA has assisted multiple workforce development agencies across the United States with strategic planning including Local, Regional, and State WIOA Plans and other multiagency strategic planning projects for communities of all sizes.

Our methodology has been implemented, refined, and proven. TPMA’s approach will maximize the greatest results in the development of this plan by cultivating partner and public buy-in through meaningful engagement activities and proactive communication with our client, culminating with board leadership and direction to produce a robust plan to enhance and maximize the workforce system.

TPMA has familiarity with the workforce ecosystem in Florida having completed strategic plans for 2 workforce development boards: CareerSource North Central Florida and CareerSource

BOARD RETREAT FACILITATION

SUBMITTED BY THOMAS P. MILLER & ASSOCIATES, LLC

Citrus Levy Marion; and serving as One-Stop Operator for CareerSource Citrus Levy Marion and CareerSource Southwest Florida. TPMA is familiar with CareerSource Capital Region programs, the CareerSource Capital Region 4-year plan as well as the Florida Chamber of Commerce 2030 plan. The team is highly capable of synthesizing the Florida Chamber 2030 plan in the workforce and education realm and applying the pertinent information to the required 2-year update of the 4-year plan to achieve outcomes across the region. The following are examples of comparable work TPMA has provided to similar local and state workforce boards. The highlighted titles provide links to final deliverables.

CareerSource North Central Florida, Strategic Planning Services, FL, 2018

CareerSource North Central Florida is the local workforce development board for Alachua and Bradford Counties in Florida, including the City of Gainesville. TPMA was hired to assist the Board in creating a strategic plan to guide the Board's work over the next three years. The team conducted three surveys with businesses, jobseekers, and workforce system staff and partners, as well as focus groups in each county to gather feedback on the Board's work and previously strategic initiatives, and input to the new plan. With this information, the Board held a strategic planning session to shape its strategic direction moving forward. The resulting plan contains a revised mission and vision statement, scorecard, goals, strategies, and tactics, with a detailed action plan for the first year of implementation.

Green River Workforce Development Board Strategic Plan 2020

TPMA worked with the Green River Workforce Development Board to develop a strategic plan to galvanize the workforce ecosystem and bring together partners. TPMA facilitated discussions with elected officials as well as the board to develop a plan to improve the employment and training system in the region, as well as the quality of workforce. The process involved identifying specific areas of need and determining solutions with specific timelines and measurable outcomes.

Southeast Michigan Community Alliance: Strategic Plan 2021-2024

TPMA recently worked with the Southeast Michigan Community Alliance (SEMCA) Board to develop a 2021 Strategic Plan that will serve as a roadmap for achieving priorities related to the local workforce development system. The plan was designed to build on the foundation of previous planning initiatives with special attention to the improved implementation. Using information gathered from regional stakeholders, a series of goals were developed that reinforce the SEMCA to provide innovative leadership to create an inclusive, life-long talent and career development system that is responsive to labor market and industry demands. Detailed labor market analysis, interviews, and focus groups were used to inform the final plan. The final plan can be viewed [HERE](#).

Southeast Tennessee Local Workforce Development Board, Comprehensive Strategic Planning, TN, 2019-2020

TPMA developed the mandated multi-year strategic plan for the Southeast Tennessee Local Workforce Development Board. Located within and around Chattanooga, the Board sought to

BOARD RETREAT FACILITATION

SUBMITTED BY THOMAS P. MILLER & ASSOCIATES, LLC

align their local strategic plan with the State's Strategic Plan, aligning priority areas. TPMA facilitated an initial kick-off meeting with the Board to discuss the vision of the plan as well as new mission and vision statements. Concurrently, TPMA collected labor market information to detail the economic landscape of the region, including emerging and declining sectors, demographic changes, and in-demand skills. A survey was developed and distributed to partners and board members to assess the strengths, challenges, and existing opportunities of the local workforce system. Additional insight was gathered through one-on-one phone interviews with businesses whose insights were not previously collected. With quantitative and qualitative data in hand, TPMA drafted the Board's strategic plan and presented it to the Board for approval. The Board's Strategic Plan provides direction for the board over the next three years with identified goals, strategies, and accountability. The final plan can be viewed [HERE](#).

South Carolina's State Workforce Development Board: Strategies to Build a Competitive Workforce

In 2017, TPMA partnered with South Carolina's State Workforce Development Board and the state workforce ecosystem to develop the State Workforce Development Boards' Strategic Plan, Strategies to Build a Competitive Workforce. Working with key stakeholders in the state, as well as members of the State Workforce Development Board, a comprehensive SWOT analysis was conducted to develop action plans to strengthen the State's workforce, engage high-demand industries, and overcome employment barriers that South Carolinians are facing. TPMA developed an implementation guide consisting of eleven strategies acting as a toolkit for the Board in achieving their goal of a stronger workforce.

Career Source Citrus Levy Marion: Strategic Plan for the Workforce Innovation Opportunity Act and Beyond

TPMA facilitated the development of Career Source Citrus Levy Marion's Strategic Plan for the Workforce Innovation Opportunity Act and Beyond, crafting a blueprint for a local workforce development area to capitalize on the implementation of the Workforce Innovation and Opportunity Act. The final plan can be viewed [HERE](#).

APPROACH

Since DEO and CareerSource Florida approved the 4-year CareerSource Capital Region Plan in 2020, economic and workforce systems across the country have experienced significant change spurred by the pandemic. In addition, the implementation of Florida House Bill 1507 (HB1507) will require careful planning and coordination from CareerSource Capital Region that can be included in the strategic planning process.

TPMA is familiar with Strategic Thinking and Strategic Doing™ having worked with the developer Ed Morrison and understands the value of the methodology when it comes to creating plans with tangible outcomes. TPMA will use Agile principles and values as well as SMART goals (Specific Measurable Achievable Realistic and Timely) to guide the Board (23 members) and the Local Elected Officials (3) to assess the current strategic plan, compare to the Florida Chamber 2030

plan, and assess the current economic conditions and forecasts to align the 2-year amendment to the 4-year plan, considering the implementation of Florida House Bill 1507.

PROPOSED PROJECT PLAN

Task 1 – Launch Call with CareerSource Capital Region Senior Board Staff

TPMA will schedule and facilitate a virtual project launch meeting with CareerSource Capital Region Senior Board Staff. This call will be used to talk through the scope of work, schedule, and deliverables and identify existing documents to be reviewed in Task 2. The Team will ask Senior Board Staff to define what success looks like for CareerSource Capital Region at the conclusion of the process. In addition, we will ask the participants of this call to provide their insight on the existing Mission, Vision and Goals and capture their response. In preparation for the next meeting, TPMA will ask that the leadership weigh in on the following areas:

- Perceived progress against the existing strategic plan
- Current relevance of goals established during the prior planning process
- Efficacy of strategies and tasks associated with stated goals
- Identification of goals and strategies that may need to be added, deleted, or modified
- What worked well the last time and what are areas that need improvement for planning and strategizing into the future?
- Areas of alignment with the Florida Chamber 2030 plan
- Implementation of HB1507
- What do you perceive to be the most significant challenges related to Covid-19?

TPMA anticipates working very closely with Senior Board Staff to prepare for the execution of the event. Biweekly project updates will be scheduled to ensure consistent communication and timely reporting of project deliverables.

Timeline: November 2021

Deliverables: Agenda for Call, Project Scope and Project Plan

Task 2 – Document Review & Data Collection

TPMA will review existing documents related to and provided by Senior Board Staff including the CareerSource Capital Region four-year plan, Florida Chamber 2030 plan, and other relevant documents to solidify understanding of implementation and planning efforts to date. As TPMA has familiarity with the workforce ecosystem in Florida, our foundational knowledge will support a holistic view that considers trends and changes in the regional workforce system.

TPMA will conduct a quantitative data analysis of local and regional labor market trends in the 3-county area, with special attention to pandemic related changes. Analyzing demographic, industry, and occupational data will provide a foundational understanding of the workforce area and identify priority areas that are within reach based on the current economy and labor market. TPMA will concentrate data analysis on the following:

- **Demographics:** Population demographics (race/ethnicity, age, family dynamics); Educational Attainment; Commuting Patterns; Income & Poverty Levels; Housing Characteristics

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- **Labor Force:** Labor force participation; Unemployment; Unemployment Rate; Employment
- **Industry Analysis:** Major sectors and sub-sectors by employment, including current and projected levels; Analysis of location quotient and shift-share statistics to identify regional competitive advantages; Economic impact of additional job growth in key industries in terms of job creation and household income growth
- **Occupational Analysis:** Major and detailed occupational groups by employment, including current and projected levels; Employment needs by major industry clusters; Annual openings; Knowledge, Skills, and Abilities (KSAs); Education and Training Requirements; Occupational replacement and growth demand
- **Business Profile:** Top companies in the 3-county area by employment size; Job posting characteristics (duration, top hiring companies, in-demand skills (technical and common))

TPMA has access to multiple proprietary databases in addition to publicly available databases state- and nationwide. Specific resources available to TPMA include:

- **Economic Modeling Specialists International (Emsi):** Employment and earnings data by ZIP code, drilled down to 6-digit NAICS (North American Industry Classification System) and 5-digit SOC (Standard Occupational Classification) codes; input-output modeling; technical and common skills by 5-digit SOC code; educational attainment and training requirements; job postings by location, job title, occupation, industry, and company
- **U.S. Census Bureau:** Current Population Statistics; On the Map Commuting Patterns; American Community Survey
- **U.S. Bureau of Labor Statistics:** Quarterly Census of Employment and Wages; Local Area Unemployment Statistics (LAUS); Labor Force Statistics (Unemployment, Unemployment Rate, Employment, Labor Force Participation); Job Openings and Labor Turnover Survey; Occupation Employment Statistics
- **U.S. Bureau of Economic Analysis:** Regional Economic Accounts

TPMA will summarize the data findings into a report to be shared with senior Board staff. This summary report will be included as an appendix in the final strategic plan.

Timeline: November 2021

Deliverables: Summary Report

Task 3 – One on One Interviews

TPMA will facilitate one-on-one interviews of not more than 15-30 minutes in length with five (5) select board members. TPMA will work with Senior Board Staff to identify appropriate candidates for the interviews. TPMA will schedule individual sessions to ask each interviewee for feedback related to the following topics:

- Perceived progress against the existing strategic plan
- Current relevance of goals established during the prior planning process
- Efficacy of strategies and tasks associated with stated goals
- Identification of goals and strategies that may need to be added, deleted, or modified

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SUBMITTED BY THOMAS P. MILLER & ASSOCIATES, LLC

- What worked well the last time and what are areas that need improvement for planning and strategizing into the future?
- What are the implications of Covid-19?

Interview responses coupled with data collection will inform a SWOT analysis and guide the planning session agenda, ensuring that retreat topics align to current priorities.

Timeline: December 2021

Deliverables: One-on-one interviews, SWOT Analysis Summary

Task 4 – Strategic Planning Session

TPMA will facilitate an in-person strategic planning session as part of the scheduled board retreat in January 2022. During this session, TPMA will present the planning process overview, report on findings of the document review as well as a summary of the feedback to the existing strategic plan. TPMA will facilitate a discussion of the SWOT analysis and how that aligns with each goal, corresponding strategies, associated tasks, benefits, funding, and policy impact. The intent is to identify overall progress against the existing strategic plan, confirm goals, strategies and tasks associated with stated goals moving forward including identifying what must be added, deleted, or modified in alignment with the SWOT analysis. TPMA envisions a highly interactive session with the Board and will provide two facilitators for the session. TPMA's experience in planning sessions will ensure that the board members are engaged with each other to shape the strategies and goals that will support the mission and vision of CareerSource Capital Region. We will work closely with Board Senior Staff to develop the agenda and coordinate logistics for the session. A sample agenda is provided below:

8:30 a.m. -12:00 p.m.

- Strategic Planning Process Overview
- Review Data Collected
- SWOT Activity
- Identifying Strategic Priorities

Lunch

1:00p.m - 5:00 p.m.

- Confirm priority areas
- Set goals for each priority
- Develop metrics for each goal
- Strategy Development and Action Planning
- Review Mission and Vision Statements
- Wrap-up

Timeline: January 2022

Deliverables: Planning Session

Task 5 – Presentation of Plan Draft

TPMA will present a draft of the updated strategic plan to the CareerSource Capital Region Board in a virtual meeting in February of 2022. At this session, TPMA will allow time for discussion and feedback to refine action steps, assign champions, and confirm timelines and required resources.

Timeline: February 2022

Deliverables: Review Meeting

Task 6 – Final Plan and Presentation

TPMA will develop a final draft of the plan document based on Board review and conduct a virtual presentation of the final document, inclusive of all final edits and adjustments, for adoption by CareerSource Capital Region.

Timeline: March 2022

Deliverables: Final Updated Strategic Plan

PROJECT BUDGET & TIMELINE

TPMA proposes a cost of \$33,000.00 for facilitation and design of the Strategic Plan update. We are prepared to provide the services outlined above over a period of 5 months commencing in November 2021 through presentation of the final plan update in March of 2022. The total cost is inclusive of TPMA staff time, project management, travel, and supplies. TPMA makes every effort to design efficient project plans that leverage the strengths of each team member. Our team is skilled in virtual facilitation and will make the appropriate budget adjustments if pandemic protocols prevent in-person convening.

Task	Timeline	Budget
Project Launch & Project Management	Nov 21 – Mar 22	\$2,556.00
Document Review and Data Analysis	November 2021	\$3,675.00
One on One Interviews & SWOT	December 2021	\$5,195.00
Strategic Planning Session	January 2022	\$9,070.00
Plan Draft & Presentation	February 2022	\$8,015.00
Final Plan & Presentation	March 2022	\$2,735.00
Travel		\$1,754.00
Total		\$33,000.00

REFERENCES

Shuana Davis, Director of Industry Partnerships

Pennsylvania Labor and Industry, Pennsylvania Workforce Development Board, 651 Boas Street, Room 514 Harrisburg, PA. Phone: 803-463-2917. Email: shesdavis@pa.gov (Formerly State Sector Partnerships Coordinator for South Carolina Department of Employment and Workforce)

Towanna Hicks, Career Services Director

Morris College and Workforce, 100 W College St, Sumter, SC, Phone: 803-795-9124. Email: thicks@morris.edu


Rusty Skinner, Chief Executive Officer

CareerSource Citrus Levy Marion, 3003 SW College Road, Suite 205, Ocala, FL 34474. Phone: 352-973-97939 ext.1204. Email: rskinner@careersourceclm.com



BENJAMIN WILSON, Ed.D.

Senior Manager
Thomas P. Miller & Associates

 benjamin-wilson2020

ROLE: Strategic Advisor

Ben is a Senior Manager at TPMA with extensive experience in workforce ecosystem planning. He will advise the project team and guide development of the final plan.

EDUCATION

Social & Comparative Analysis/Process Improvement Science, Ed.D., Aug 2021
University of Pittsburgh

Communications, M.A.
Edinboro University of Pennsylvania

Sociology, B.A.
Edinboro University of Pennsylvania

EXPERTISE

- Workforce Development
- Program/Operations Management
- Urban Development
- Diversity & Inclusion
- Organizational Change Management

TECHNICAL SKILLS

- Strategic Planning
- Grant Writing
- Group Facilitation
- Program Design/Implementation
- Research & Evaluation

REACH ME AT

- ✉ bwilson@tpma-inc.com
- ☎ 814-860-6348
- 🏠 Erie, PA

PROFESSIONAL SUMMARY

Ben is a Senior Manager on the Workforce Development team. He has proven expertise in spearheading the planning, designing, implementation, and integration of large-scale highly regulated and sustainable program ecosystems customized for youth and adults in need of programs.

Prior to joining TPMA, Ben served as the One Stop Operator for EQUUS Works/Northwest PA CareerLink where he provided strategic leadership to 20+ state-mandated workforce development programs to ensure alignment with state and federal regulations, implemented a comprehensive change management campaign for the entire six-county region resulting in improved internal processes, and pioneered the migration to virtual service delivery across partner programs for youth and adults.


As the Workforce Development Director for the Greater Erie Community Action Committee, Ben secured \$500k in funding for the Adult Education Development (GED) Program and generated and managed \$350k through the Department of Housing and Urban Development and the City of Erie to help the homeless population with rental assistance.

Ben will complete his Doctor of Education from the University of Pittsburgh in August of 2021.



NITHYA PRAMEKUMAR

Senior Project Manager
Thomas P. Miller & Associates

 nithyapramekumar

ROLE: Project Lead

Nithya is a skilled facilitator with extensive experience in planning strategy for workforce development. She will lead board engagement and plan design. Nithya will be the main point of contact.

EDUCATION

Master of International Business
Monash University

Bachelor of Arts, Social Sciences
State University of New York at Buffalo

Training/Certification

Diversity, Equity, and Inclusion in the
Workplace Certification
*USF Office of Corporate Training and
Professional Education*




EXPERTISE

- Workforce Development
- Economic Development
- Organization & Talent Development
- WIOA
- Diversity, Equity, & Inclusion
- Community Engagement

TECHNICAL SKILLS

- Facilitation
- Strategic Planning
- Training & Professional
Development

REACH ME AT

 npramekumar@tpma-inc.com
 803-900-0199
 Cassatt, SC

PROFESSIONAL SUMMARY

Nithya's enthusiasm for workforce and economic development, DEI, and community engagement goes hand in hand with her 12+ years of experience in a variety of capacities related to the workforce ecosystem. She is an experienced practitioner specializing in stakeholder management, strategic planning, meeting facilitation, training and professional development, American Job Center outreach, and organization and talent development. Nithya's strong project management skills allow her to manage many initiatives concurrently. She speaks multiple languages, including Malay, Tamil, and Malayalam.

Nithya has worked with stakeholders across the country to foster business and industry engagement, workforce and economic development growth, and public private partnerships. Understanding the importance of diversity equity and inclusion, Nithya embeds an equity lens within all processes to ensure successful outcomes for everyone, particularly vulnerable populations.

Prior to TPMA, Nithya provided technical assistance and consulting to the high-profile members of the State Workforce Development Board (SWDB) in South Carolina shaping workforce and economic development initiatives at a statewide level.

RELEVANT EXPERIENCE

South Carolina Workforce Board

Statewide Strategic Plan, SC

CareerSource Citrus Levy Marion

One-Stop Operator, Citrus, Levy, Marion Co., FL

Northern New Mexico Perkins V Consortium

Statewide Work Based Learning Expansion Strategic Plan


Pearland Economic Development Corp

Workforce Strategy Development, TX



REAGAN WALSH

Project Associate
Thomas P. Miller & Associates

 reaganwalsh

ROLE: Workforce Development Specialist

Reagan specializes in research, data analysis, and the development of recommendations that support long-term strategy for workforce development. He will support all aspects of the project.

EDUCATION

Certificate in City/Council Management,
Master's Degree, Public Affairs
The University of Kansas

Bachelor of Science in Finance
The University of Kansas




EXPERTISE

- Workforce Development
- Business Development
- Performance/KPI Management
- Budgeting and Forecasting

TECHNICAL SKILLS

- Data Analytics
- Policy Review
- Survey Design & Analysis
- Strategic Planning
- Asset Mapping

REACH ME AT

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 913-284-4359
 Kansas City, MO

PROFESSIONAL SUMMARY

Since joining TPMA in February, Reagan has worked primarily with conducting research in the areas of Grant Funding, Procurement, and Business Development. Prior to joining TPMA Reagan worked with the City of Olathe in Kansas to develop and analyze the City's internal and external performance benchmarks and assisted in the creation of the Budget Book through extensive research in economic development and planning divisions. Reagan interned with the Asian Venture Philanthropy Network in Singapore assisting with research on funding and ecosystems for social and creative enterprises.

Reagan holds Bachelor of Science in Finance from The University of Kansas and is currently working towards his Master of Public Administration from the University of Kansas and will graduate in May 2022.

RELEVANT EXPERIENCE

The Manufacturing Institute
DEI Playbook Expansion, Washington, D.C.

Indiana Youth Institute
Environmental Scan of Youth Serving Organizations, IN


Tiffin-Seneca Economic Partnership
Workforce Retention Strategy, Tiffin, OH

Pearland Economic Development Corp
Workforce Strategy Development, TX



ELÁNA FRAZIER

Project Manager
Thomas P. Miller & Associates

 elanarfrazier

ROLE: Project Success Manager

Elana and will serve as the Project Manager. In this role, she will coordinate the work of the project team ensuring that deliverables are high quality and on time.

EDUCATION




Master of Science in Project Management
Boston University

Bachelor of Science in Sports, Entertainment &
Event Management
Johnson & Wales University

EXPERTISE

- Project Management
- Healthcare Policy
- Public/Social Policy
- Diversity, Equity, & Inclusion
- Professional Development
- Strategic Partnerships
- Workforce Development
- Economic Development

REACH ME AT

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 347-703-0083
 Columbia, SC

PROFESSIONAL SUMMARY

As a Project Coordinator for the South Carolina Institute of Medicine & Public Health, Elána managed the development of policy briefs to inform legislators and influence policy decisions at the state level. She was instrumental in coordinating collaboration of academia, state agencies and public health stakeholders on health policy related to diversity, equity, and inclusion. She also authored the 2021 South Carolina Behavioral Health Progress Report.

During her work as the South Carolina Special Projects Coordinator for the Governors State Workforce Development Board, Elána supervised federal and state funded strategic partnerships, workforce initiatives, economic development plans, and statewide diversity, equity and inclusion efforts.

Her work has included facilitation of organizational training to address equity issues and policy fairness. She has also worked to develop and implement training curriculum and professional development opportunities for State Workforce Development Board members.

RELEVANT EXPERIENCE

South Carolina Institute of Medicine & Public Health - Project Coordinator

South Carolina Workforce Development Board
State Special Projects Coordinator