

**GEORGIA MOUNTAINS WORKFORCE INVESTMENT BOARD
PLANNING SESSION
December 7, 2011**

INTRODUCTION

On December 7, 2011, representatives of the newly established 13-county Georgia Mountains Workforce Investment Board and staff met at the offices of the Georgia Mountains Regional Commission in Gainesville, GA for an initial strategic planning session. Meeting participants included:

Board Members

1. Charlie Auvermann (Dawson County)
2. Tim Burke (Lanier Tech)
3. David Cagle (Hart County)
4. Bill Chafin (Hart County)
5. Rex Farmer (Hall County)
6. Pat Freeman (Agency on Aging)
7. Andrea Gibby (Township County)-Chair
8. Mitch Griggs (Union County)
9. Peter Hill (Dawson County)
10. Dr. John Raber (Lumpkin County)
11. Janice Riley (9th District Opportunity)
12. Audrey Turner (Habersham County)
13. Gerald Voyles (Franklin County)
14. Angela Whidby (Franklin County)

Guests/Representatives

1. Mark French (Lumpkin County)
2. Gloria Kusmik (GDoL)
3. Peggy Lovell (GMRC)

WIB Staff

1. Diana Eddins-Wiggins
2. Diane Jackson
3. John Phillips
4. Nona Turk
5. Jessica Williams

The Georgia Department of Labor sponsored the session. Wynn Montgomery, Manager of WynnMill Solutions, served as Facilitator and wrote this report, which summarizes the process and results

WELCOME/OVERVIEW/INTRODUCTIONS

Board Chair Andrea Gibby opened the session by thanking the Georgia Department of Labor for its sponsorship and all attendees for investing their time in this effort. She then introduced the Facilitator, who reviewed the agenda and invited all to introduce themselves and to talk briefly about why they are willing to serve on the WIB.

WIA: BOARD BASICS

Following introductions, the Facilitator provided a brief overview of the WIA legislation and the roles and responsibilities of Board members. This lecture put WIA into its historical context and then focused on the seven principles underlying the legislation. It then reviewed the opportunities that WIBs have to make a positive impact in their local communities and offered suggestions regarding how individual Board members can best contribute to the success of the Board. Attendees then had the opportunity to ask questions about what they had heard.

STRATEGIC PLANNING OVERVIEW

The planning portion of the meeting began with a quick overview of the terms that would be used throughout the session and an explanation that the Facilitator hoped to help the Board develop the mission and values statements that would form the basis for everything the WIB did thereafter. Following agreement on those basic concepts, the group would undertake an environmental (SWAT) analysis, determine the areas where the Board should focus its attention, and develop preliminary goals within those focus areas.

MISSION STATEMENT DEVELOPMENT

Following an introduction that described the importance of mission statements and offered a few examples, the Facilitator created four small groups and asked each to develop a draft mission statement for the Georgia Mountains WIB. When that task was completed, each of the groups joined one other, creating two groups which consolidated their drafts into a joint mission statement. Then the entire group came back together to combine the two statements into a single statement, which received the endorsement of all attendees. The “flow chart” on the following page (EXHIBIT I) shows each step in this iterative process, which produced the following mission statement:

*To achieve
sustainable economic growth & individual self-sufficiency
by developing, sustaining, and promoting
employment resources & opportunities
for all job-seekers & employers
through community partnerships.*

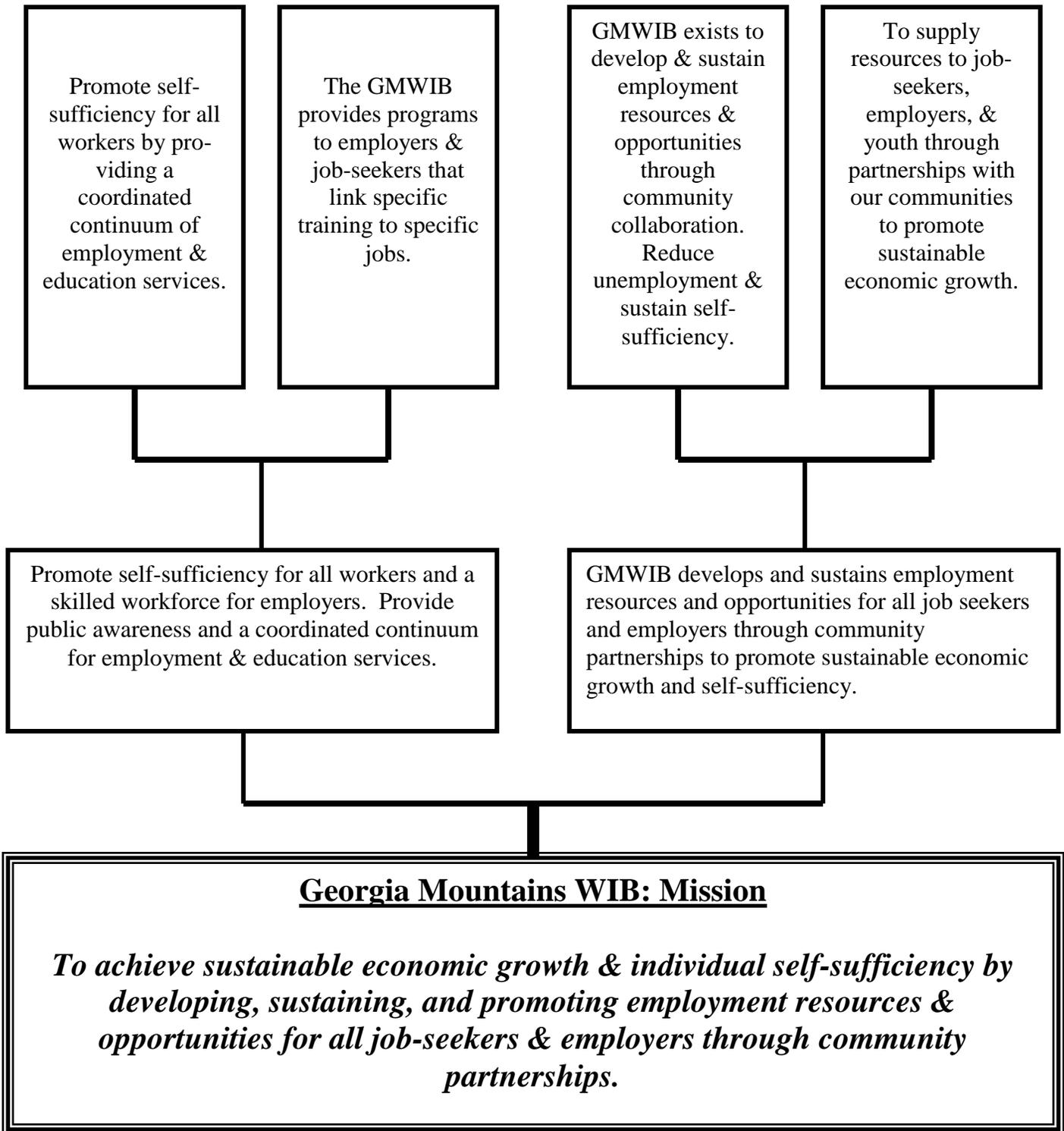
VALUES STATEMENT

Following lunch and a brief Board meeting, the group brainstormed to develop the following list of values that would guide the WIB and its staff in all of its dealings:

- *Accountability*
- *Collaboration*
- *Communication*
- *Compassion*
- *Customer Focus*
- *Innovation*
- *Integrity*
- *Participation*
- *Quality Focus*
- *Respect*
- *Service Orientation*
- *Strong Leadership*
- *Transparency*

GEORGIA MOUNTAINS WIB MISSION STATEMENT

An Iterative Process



ENVIRONMENTAL ANALYSIS/IDENTIFICATION OF PRIORITIES

With the mission and values statements in place, the group was ready to undertake an analysis of the factors that would help or hinder the WIB's efforts to achieve its mission. Four small groups each developed a list of internal strengths and weaknesses and external allies and resources and threats—a classic SWAT Analysis. When these groups presented their analyses to the full group, the positives (strengths, allies, and resources) were consolidated into a list of "ASSETS" and the hindrances (weaknesses and threats) combined as "BARRIERS."

Each attendee then indicated four items from the consolidated lists that seemed most important for the WIB to address, considering the importance of the items and likelihood that the WIB could have an impact. Based on that vote, the lists of Assets and Barriers are presented below in rank order (followed by the number of votes, if any, in parentheses):

ASSETS (Strengths/Allies/Resources)

- Good leadership (6)
- Positive media (6)
- Number of resources (5)
- Similar regional interests/attributes (5)
- Existing programs (3)
- Health care delivery system (3)
- Technical education (2)
- All 13 counties represented (1)
- Intelligence (1)
- Political support (1)
- Public-private agencies/GDL (1)
- Tourism (1)
- Industrial diversity
- Large customer base/labor force
- New Board
- GA Power/Utilities Ec. Development

BARRIERS (Weaknesses/Threats)

- Lack of public awareness (14)
- Lack of highly skilled labor (7)
- Worker apathy (6)
- Inter-agency "turf" wars (5)
- Don't know community needs (4)
- Employers don't perceive benefits (4)
- Low high school graduation rate (3)
- Large geographic territory (2)
- Competition (inter- & intra-state)
- Current economic conditions
- Duplication of resources
- Few private sector reps on WIB
- Inexperienced Board
- Lack of access of industries
- Limited health care for elderly
- Limited resources/danger of cuts
- Politics in DC & Atlanta
- Red tape
- Tax structure
- Transportation
- Water wars
- Weak industrial base

Only one item (lack of public awareness) was considered a top priority by a majority of the 20 voters, while seven other issues were ranked by at least 25% of the voters. At first glance, these results suggest a diversity of opinions that would make identification of consensus priorities difficult if not impossible. Closer examination, however, revealed that most of the issues that garnered votes could be consolidated within four major focus areas. Those areas are presented and discussed below.

PRIORITY FOCUS AREAS

As summarized below, most of the assets and barriers identified as important areas where the WIB might have an impact (as well as some that received no votes) can be included within one of four focus areas. Specifically:

■ COORDINATION/COLLABORATION

- Asset: Number of resources (5)
- Barrier: Inter-agency “turf” wars (5)
- Asset: Existing programs (3)
- Asset: Technical education (2)
- Asset: Public-private agencies/GDL
- Asset: Georgia Power/Utilities Economic Development
- Barrier: Competition (inter- & intra-state)
- *Barrier: Duplication of resources*

■ JOB-SEEKER SKILLS

- Barrier: Lack of highly skilled labor (7)
- Barrier: Worker apathy (6)
- Barrier: Low high school graduation rate (3)
- Asset: Large customer base/labor force

■ PUBLIC AWARENESS

- Barrier: Lack of public awareness (14)
- Asset: Positive media (6)
- Barrier: Employers don’t perceive benefits (4)
- Asset: Political support (1)

■ BOARD DEVELOPMENT

- Asset: Good leadership (6)
- Asset: Similar regional interests/attributes (5)
- Barrier: Don’t know community needs (4)
- Barrier: Large geographic territory (2)
- *Asset: All 13 counties represented (1)*
- *Asset: Intelligence (1)*
- *Asset: New Board*
- *Barrier: Inexperienced Board*
- *Barrier: Few private sector reps on WIB*

The group agreed that concentration on these four focus areas would allow the WIB to address all of the key issues identified during the environmental scan except for the two that dealt with health care. After some discussion, the group concluded that this issue, while important, is not really a workforce development issue except that health care is a growing occupational area that should be a target for the WIB’s training and placement efforts. (NOTE: The above groupings were updated/refined during preparation of this report by adding the items in italics to focus areas where they seem to fit.)

DEVELOPING GOALS/ENVISIONING SUCCESS

The final step in the planning process for this session was the creation of “Idea Teams” around each focus area. Each attendee selected one focus area, and the resulting teams met (1) to discuss what success would look like in this focus area and (2) to develop some goals for attaining that vision. The visions of success were to define how the WIB would know it had been successful. The goals were to describe broad areas of endeavor, and the teams were encouraged to develop them by defining how to utilize identified assets or to reduce or eliminate barriers. No-one volunteered to discuss “Board Development.” The results of the discussions of the other three focus areas are summarized below followed by the Facilitator’s suggestions for the fourth area.

FOCUS AREA: COOPERATION & COLLABORATION

IDEA TEAM: Auvermann, Gibby, Griggs

SUCCESS VISION:

- Job seekers know what’s available & how to access services
- Workers are prepared for 21st Century opportunities
- Have total provider buy-in to collaboration/enhancements
- High awareness of WIB continuum among job seekers and employers
- “Full” employment

GOALS:

- Improve collaboration among all agencies and resources.¹
- Identify service gaps.
- Enhance target services.

STRATEGIES:²

- Develop a comprehensive inventory of services.
- Increase agency administrators’ awareness of employment and training [WIA] services

FOCUS AREA: JOB-SEEKER SKILLS

IDEA TEAM: Burke, Cagle, Freeman

SUCCESS VISION:

- Median income is higher
- Real unemployment rate is lower
- More summer youth jobs are available
- Advocating GED
- Better high school graduation rates³

¹ NOTE: This goal consolidates into a single statement two almost identical goals offered by the team.

² NOTE: The team presented these items as goals, but they seem to be means toward an end and hence strategies.

³ NOTE: The team listed this as a goal, but agreed that the WIB cannot directly impact this rate. It is probably more appropriately viewed as a part of the success vision.

FOCUS AREA: JOB-SEEKER SKILLS [continued]

GOALS:

- Prepare job-seekers to meet industry needs.
- Create more summer youth jobs.

FOCUS AREA: PUBLIC AWARENESS

IDEA TEAM: Hill, Raber, Turner, Volyes, Whidby

SUCCESS VISION:

As indicated below, this team devoted its time to developing not only goals, but also a list of more specific strategies for achieving these goals.

Facilitator's Suggested Success Vision: The WIB is recognized throughout the region as the voice of workforce development. When media representatives seek an expert opinion concerning issues related to the workforce, they contact the WIB Chair. Employers and job-seekers alike come to the One-Stop for service and are well-pleased with the results.

GOALS:

NOTE: This team moved immediately into a "strategic" mode. Its goal statements are much more specific than those developed by other teams. In an effort to achieve a consistent level of detail, the Facilitator suggests that the WIB consider goals such as the following and treat the ideas from the team as an excellent list of strategies. These suggested goals are based on the assets and barriers identified and represent "broad statements of intent" or ends which the WIB hopes to achieve. The strategies represent specific steps (means) toward those ends.

- Create positive "name recognition" for the WIB and its activities/programs.
- Cultivate the support of local news media.
- Increase employer awareness of the WIB.

STRATEGIES

- Develop a broad multi-media campaign
 - PSAs, articles, flyers
 - Tech school and college channel access—"infomercial"
 - Chambers of Commerce
 - Civic Clubs
 - Commission meetings—public comment
 - High school seniors
 - High school public access channel
 - Promote through local law enforcement
 - Promote through DFACS & Foster programs
 - Promote through local churches
 - Promote through DOL local career center
 - Host educational class
 - Email "blast" through Chamber of Commerce
 - Promote through social media
- Establish a PR person who handles communication with all media outlets
- Develop an education campaign through local Chambers of Commerce

FOCUS AREA: BOARD DEVELOPMENT

Facilitator's Observations/Recommendations: As referenced above, no WIB members opted to serve on the Idea Team for this focus area during this planning session. While it is understandable that Board members preferred to concentrate on the other important issues identified during the environmental scan, the Facilitator believes that successful Board development lies at the heart of the organization's success. Without a strong Board, the likelihood of accomplishing the other goals the WIB has set for itself is greatly diminished. Therefore, please consider the following suggestions—perhaps as a discussion topic at a future Board meeting.

SUCCESS VISION:

- *The WIB includes active representatives from all 13 counties at every meeting.*
- *A majority of the WIB members represent employers in the area, including some major employers. Members who wear two (or more hats) put their employer hat on top.*
- *There is a waiting list of people who want to be on the WIB.*
- *WIB members talk about WIB activities at their local civic group meetings.*
- *WIB members regularly attend regional (SETA) and national (NAWB) meetings.*
- *Members enjoy WIB meetings and think they are productive.*
- *The WIB conducts annual self-assessments and makes changes based on findings.*

GOAL:

- *Create and support a Workforce Investment Board that is representative of the community, effective for all stakeholders, and enjoyable for all members.*

STRATEGIES:

- *Implement an on-going Board Development program.*
 - *Create a formal orientation program for new members*
 - *Include a Board development topic in every Board meeting*
 - *Create a committee system around topics identified by strategic planning*
 - *Create a "buddy system"*
- *Develop a job description for WIB members*
- *Increase private sector presence on the WIB*

NEXT STEPS

The Board accomplished a great deal in this one-day session. It developed a Mission Statement and a list of Core Values that will guide the WIB and its staff in all future efforts. It conducted an environmental scan (SWAT Analysis), which allowed it to identify four Focus Areas on which to concentrate its efforts, and developed initial goals for addressing those areas. It even developed a few strategies for pursuing those goals. These achievements represent a very good start for a new WIB. It is, however, only a start. The organization's ultimate success will require continued commitment and follow-through.

One of the inherent disadvantages to doing strategic planning in such a compressed time frame is that there is limited time for reflection. Therefore, **Recommendation: The first follow-up step is a thoughtful review of the mission statement, core values, focus areas,**

and goals by the full Board. This review should begin with each WIB member receiving a copy of this report and should be followed with discussion at the next meeting of the Board. This discussion would allow members who participated in the planning session to familiarize other members with the mission and values that are intended to guide the WIB's future activities. These statements should be refined as necessary to ensure buy-in by the entire Board. The focus areas and goals should receive similar discussion—especially the goals related to Board Development, which were suggested by the Facilitator rather than an Idea Team.

Once the WIB has reached consensus agreement on these topics, the necessary in-depth implementation planning can begin. The goals developed during the session are general statements of intent. **Recommendation: In order to reach these goals, the WIB and its staff will need to develop strategies for each goal followed by detailed action plans for achieving each strategy.** The few strategies that were developed during the session can serve as models for additional ones. Ideally, the WIB will have 3-4 strategies for each goal, and for each an action plan that should:

- Identify the strategy it addresses.
- Define the current situation related to that strategy.
- Describe the desired status (a success vision for that strategy).
- List the tasks that will move you from where you are to where you want to be.
- Indicate how you will now you've completed the task.
- Assign individual responsibility for each task.
- Establish a deadline for completion of each task.
- Assign oversight responsibility for completion of the total effort.
- Set a deadline for completion of the total effort.

The Facilitator will provide WIB staff with a suggested format for documenting action plans. More important, however, is creating a structure for developing the plans and tracking progress toward the desired goals.

Recommendation: Create a committee for each of the four focus areas with a committee chairman who becomes the internal “Champion” for this topic. *[NOTE: The Idea Teams formed at during the planning session can (but do not have to) become the nuclei for these committees with other members volunteering for the committee which interests them most. Every WIB member should serve on a committee.]* These committees would then meet regularly first to develop strategies and action plans and then to monitor progress. **Recommendation: Each focus area then becomes an agenda item at each Board meeting with the committee chair updating the full WIB on progress and challenges.**

If staffing and/or Board member time constraints limit the feasible number of committees, alternate approaches might include designation of (or volunteering by) individual Board members who will become “Champions” for the identified focus areas, taking responsibility for keeping the topic on the WIB's radar and reporting progress toward the desired vision. This approach is much less focused than the one recommended above and can be expected to be proportionately less successful.

WHAT WAS LEARNED/REMAINING QUESTIONS

At the end of the session, each attendee had the opportunity to answer two questions. The questions and the attendees' answers appear below:

What is the most important thing you learned today?

- Basics of the program.
- Role of the WIB.
- Overall view of how WIB Board functions.
- The full extent of the WIB's role & responsibilities (as well as the limitations).
- The Board has a great responsibility in determining the future of workforce investment.
- I am now serving on a Board that will help serve the area with better opportunity and help for job opportunities.
- Who is on my Board.
- We have an eager and passionate Board ready to do this task.
- We can work together...we have gaps...we developed some realistic goals.
- What the mission & goals of the WIB are.
- That we are all pretty much on the same page with ideas.
- Connection between mission, goals, etc. to guide the Board.
- In order to be successful with this program, the public must be keenly aware it exists.
- There is a large area of non-communication between resources that could really help our citizens.

What do you still want/need to know?

- How best to engage support of the community as a whole.
- Exactly how to educate the public.
- How are we going to get this info out to all the public to make it a success?
- Do not understand how a program like this is not widely known.
- I still don't understand all of the resources that are available.
- How the WIB will utilize its funding (w. regard to program investment).
- How the Board will allocate financial resources to target occupations.
- I still don't know the full extent of this Board and its complete function.
- What specific services we offer.
- The totality of the program.
- What can this Board do today to make a difference?
- The role between the State Workforce Investment Board and the local WIB.
- How can we be able to accomplish our goals without having more meetings?
- What our next steps are and when...

FACILITATOR'S OBSERVATIONS & RECOMMENDATIONS

As discussed above, the Georgia Mountains made a good start at this meeting. The group members participated actively and enthusiastically and generated excellent results. The desire to make this effort successful is evident, and the relative ease with which the mission statement was developed indicates a common understanding of the role of the WIB and the opportunities that are available.

Some of the remaining questions summarized above offer possible topics for additional Board development (see page 8) while others speak to the need to move ahead with implementation planning—especially in the area of Public Awareness.

Most of the Facilitator’s observations and recommendations are reflected in the discussion of the importance of an organized and on-going Board Development effort and the recommended approach to implementation planning (Next Steps, pages 8-9) and will not be repeated here.

As discussed on pages 6-7, when preparing this report, the Facilitator made some minor revisions to the Idea Teams’ reports regarding goals. A further explanation of the distinction between goals and strategies that led to these changes seems to be in order. For purposes of the implementation planning needed to get the WIB to its desired status, the distinction between these two terms is of minor importance. However, it does seem important that the WIB distinguish between the ends it seeks (called “Goals” in this report) and the more specific means (“Strategies”) it will undertake in order to achieve those means. The terminology used in this report is consistent with the “Strategic Planning Components” and the definitions of terms presented in the handout used during the planning session. In the Facilitator’s opinion, the distinction between the two terms creates a level of consistency across the focus areas and should help the Board to more easily explain—both internally and externally—what it hopes to accomplish.

Although we created four apparently distinct focus areas and developed goals for each, be aware that these areas (and the associated goals) are closely inner-connected—as illustrated by the overlap among the various success visions. Public Awareness is important (perhaps vital), but only by providing good Job Seeker Services will you create the kind of positive word-of-mouth promotion that is vital to your success. Collaboration/Coordination is an important part of the WIB’s role, but perhaps is more appropriately viewed as a means to other ends than as an end in itself. The integral role of Board Development and its impact on all other areas was discussed earlier.

The element that seems to be missing from the current plan is a strong emphasis on local businesses. Employers’ limited awareness of WIA and the WIB was cited as a Public Awareness barrier, and one goal suggested by the Facilitator addresses this barrier. More important than making employers aware of the program, however, is engaging their support in designing a system that is responsive to their needs and earning their support for—and use of—the system. Therefore:

RECOMMENDATION: The Georgia Mountains WIB should make engagement of the business community a priority. Specifically, representatives of major local employers should be added to the Board, and current members who are both employers and local elected officials should wear their “employer hats” to the WIB meetings.

If the WIB accepts this recommendation, it may be able to include a suitable goal within one of the four selected Focus Areas, or it may prefer to make Employer Relations a Focus Area, expanding the number to five or replacing one of the current areas to keep the number at four.