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# FLORIDA TALENT DEVELOPMENT COUNCIL

October 1, 2019

To: Florida Talent Development Council Members

Prior to our meeting on October 7<sup>th</sup>, let me say that I am honored to work with a Council comprised of such highly accomplished leaders – in government, business and education! I look forward to learning from your thoughts and ideas while also sharing some of my experiences.

We should all feel blessed – I do -- to be able to serve the citizens of the State of Florida in blazing a trail for the future of Florida's workforce and talent development. After all, our goal should be to use our collective knowledge and experiences to provide a path forward for the next generation; therefore, making Florida an even greater place to learn, work and reside.

My sincere thanks to Governor DeSantis for my appointment and the confidence he has placed in me and my job creating experiences. Likewise, to the legislature for their foresight in creating the Florida Talent Development Council and entrusting our group to make a difference.

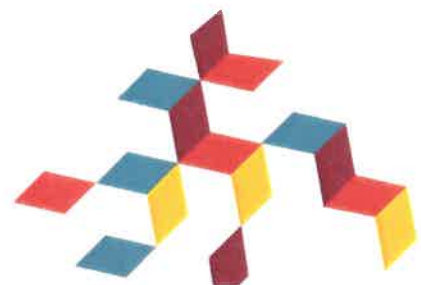
A mantra I have lived my life by is to "Always Challenge the Status Quo." If we are to make a true difference, we should challenge the ways things are done today and our current thinking -- in order to make dramatic improvements for the future. Why settle at a goal of 60%? Why not make Florida the preferred recruiting hub for companies in and outside our state?

Perhaps a different starting point than perceived in the statute, but in concert with our Agenda, is to survey employers asking them what they are looking for in today's workforce and the skills they need for tomorrow. Once we know that, we can build and deliver what they want. Just a little food for thought.

Enough said for now. I look forward to meeting, working and strategizing with each of you to build an improved future for the next generation workforce.

Sincerely

Joel A. Schleicher,  
Chairman, Florida Talent Development Council





# FLORIDA TALENT DEVELOPMENT COUNCIL

## Agenda Meeting of October 7, 2019

### I. Welcome and Introductions

- a. Benediction – Representative Rene Plasencia
- b. Pledge of Allegiance – Senator Travis Hutson
- c. Roll Call/Introductions
- d. Appointment of Vice Chair
- e. Appointment of Secretary

ALWAYS CHALLENGE THE STATUS QUO – Chair’s Introduction

### II. Purpose and Preliminary Deliverables

#### a. Section 1004.015 Florida Statutes

Develop a coordinated, data driven, statewide approach to meeting Florida’s needs for a 21<sup>st</sup> century workforce that employers and educators use as a part of Florida’s talent supply system.

##### i. HB 7071 – Workforce Education

**Heather Bishop**, Policy Chief, Higher Education & Career Readiness  
Subcommittee, Florida House of Representatives

### III. Process to Develop the Strategic Plan

- a. Identify fastest growing industries and sectors in Florida today and postsecondary credentials required for employment in those industries.
  - i. **National and State Economic and Workforce Trends**  
**Adrienne Johnston**, Chief, Bureau of Workforce Statistics & Economic Research, Florida Department of Economic Opportunity
  - ii. Discussion
- b. Assess whether postsecondary degrees, certificates and other credentials awarded by Florida’s postsecondary institutions align with high-demand employment needs and job placement rates.
  - i. **Executive Order 19-31 Career & Technical Education Audit**  
**Eric Hall**, Chancellor of Innovation, Florida Department of Education
  - ii. Discussion



- c. Identify strategies to deepen and expand cross-sector collaboration to align higher education programs with targeted industry needs.
  - i. Discussion
- d. Establish targeted strategies to increase certifications and degrees for all populations with attention to closing equity gaps for underserved populations and incumbent workers requiring an upgrade in skills.
  - i. Discussion
- e. Assess the role of apprenticeship programs in meeting targeted workforce needs and identify any barriers to program expansion.
  - i. **Apprenticeship Program Overview**  
 Richard “Ted” Norman, Program Director of Apprenticeship, Division of Career and Adult Education, Florida Department of Education
  - ii. Discussion
- f. Identify common metrics and benchmarks to demonstrate progress toward the 60 percent goal and how the SAIL to 60 Initiative under s. 1004.013 can provide coordinated cross-sector support for the strategic plan.
  - i. **SAIL to 60 Initiative Overview**  
 Carrie Henderson, Executive Vice Chancellor, Florida College System
  - ii. Discussion
- g. Recommend improvements to the consistency of workforce education data collected and reported by Florida College System institutions and school districts, including the establishment of common elements and definitions for any data that is used for state and federal funding and program accountability.
  - i. Discussion

#### IV. Council Initial Timeline and Expectations

- a. By December 31, 2019 submit a strategic plan to Governor, Senate President, House Speaker, Board of Governors, State Board of Education.
- b. Establish a timeline for regularly updating the strategic plan and the established goals.
- c. Expectations of the Council



**V. Stakeholder Presentations**

- a. **The Florida Chamber of Commerce**  
Mark Wilson, President and CEO
- b. **The Florida Council of 100**  
Bob Ward, President and CEO
- c. **The Florida Board of Governors**  
Marshall Criser, Chancellor
- d. **Florida College Access Network**  
Laurie Meggesin, Executive Director
- e. **Lumina Foundation**  
Nicole Washington, Washington Education Strategies

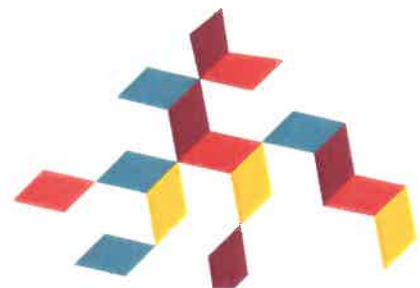
**VI. Public Comment**

**VII. Key Meeting Outcomes and Next Steps**

- a. Workgroup Assignments
- b. Next Full Meeting
  - i. Suggested Dates: October 31<sup>st</sup>; November 20<sup>th</sup>; December 17<sup>th</sup>; December 18<sup>th</sup>

**VIII. Adjourn**

\*The Council will break from 12:00 PM – 1:00 PM.



## **Florida Talent Development Council Discussion Questions**

- a. Identify fastest growing industries and sectors in Florida today and postsecondary credentials required for employment in those industries.
    - What are the most in-demand jobs today and what will they look like tomorrow?
  - b. Assess whether postsecondary degrees, certificates and other credentials awarded by Florida's postsecondary institutions align with high-demand employment needs and job placement rates.
    - What are employers looking for?
    - What postsecondary degrees, certifications and credentials are employers seeking?
    - How can postsecondary education be better aligned with employer needs and job placement?
    - What is the linkage between postsecondary degrees and jobs looking to be filled?
  - c. Identify strategies to deepen and expand cross-sector collaboration to align higher education programs with targeted industry needs.
    - How extensively has Florida surveyed current and prospective employers on skills they are looking for?
  - d. Establish targeted strategies to increase certifications and degrees for all populations with attention to closing equity gaps for underserved populations and incumbent workers requiring an upgrade in skills.
    - How are services coordinated to help simplify career development and pathways?
    - How are services aligned to support student transition from one system to another?
  - e. Assess the role of apprenticeship programs in meeting targeted workforce needs and identify any barriers to program expansion.
    - How are equity and access taken into consideration when providing work-based learning or apprenticeships?
    - How are opportunities coordinated to help students participate in apprenticeships?
    - What are the barriers to students participating in apprenticeships?
-

- f. Identify common metrics and benchmarks to demonstrate progress toward the 60 percent goal and how the SAIL to 60 Initiative under s. 1004.013 can provide coordinated cross-sector support for the strategic plan.
- Where is Florida currently?
  - What should Florida aim to achieve? i.e. Challenge the Status Quo
  - How is “high value postsecondary credential” defined?
- g. Recommend improvements to the consistency of workforce education data collected and reported by Florida College System institutions and school districts, including the establishment of common elements and definitions for any data that is used for state and federal funding and program accountability.
- What data are currently being collected by the state of Florida?
  - How are data shared throughout the education and workforce systems?
  - What gaps in data collection have been identified?



# FLORIDA TALENT DEVELOPMENT COUNCIL

## COUNCIL MEMBERS:

Joel Schleicher, Chair

Senator Travis Hutson, Senate Appointee

Representative Rene Plasencia, House Appointee

Michelle Dennard, CareerSource Florida

Jamal Sowell, Enterprise Florida

Ken Lawson, Department of Economic Opportunity

Richard Corcoran, Department of Education

Bob Ward, Florida Council of 100

Mark Wilson, Florida Chamber of Commerce

Timothy M. Cerio, Board of Governors

Marva Johnson, Vice Chair, State Board of Education

## EX-OFFICIO MEMBERS:

Chancellor Marshall Criser, State University System

Chancellor Kathy Hebda, Florida College System

Chancellor Eric Hall, Career and Adult Education

Robert Boyd, President, Independent Colleges and Universities of Florida

Brandon Biederman, President, Florida Association of Postsecondary Schools and Colleges

## CONTACT

Katie Crofoot, Director of Partnership Engagement

Florida Department of Economic Opportunity

[Kaite.Crofoot@deo.myflorida.com](mailto:Kaite.Crofoot@deo.myflorida.com)

Office: (850) 245.7499





Select Year:  

## The 2019 Florida Statutes

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[Title XLVIII](#)[Chapter 1004](#)[View Entire Chapter](#)

K-20 EDUCATION CODE

PUBLIC POSTSECONDARY EDUCATION

**1004.015 Florida Talent Development Council.—**

(1) The Florida Talent Development Council is created for the purpose of developing a coordinated, data-driven, statewide approach to meeting Florida's needs for a 21st century workforce that employers and educators use as part of Florida's talent supply system.

(2) Members of the council shall include:

- (a) One member, appointed by the Governor, to serve as chair.
- (b) One member of the Florida Senate, appointed by the President of the Senate.
- (c) One member of the Florida House of Representatives, appointed by the Speaker of the House.
- (d) The president of CareerSource Florida, Inc.
- (e) The president of Enterprise Florida, Inc.
- (f) The executive director of the Department of Economic Opportunity.
- (g) The Commissioner of Education.
- (h) The president of the Florida Council of 100.
- (i) The president of the Florida Chamber of Commerce.
- (j) One member of the Board of Governors, appointed by the chair of the Board of Governors.
- (k) One member of the State Board of Education, appointed by the chair of the State Board of Education.

(l) The following members, who shall serve as ex officio nonvoting members:

1. The Chancellor of the State University System.
2. The Chancellor of the Florida College System.
3. The Chancellor of Career and Adult Education.
4. The president of the Independent Colleges and Universities of Florida.
5. The president of the Florida Association of Postsecondary Schools and Colleges.

(3) Appointed members shall serve 2-year terms.

(4) By December 31, 2019, the council shall submit to the Governor, the President of the Senate, the Speaker of the House of Representatives, the Board of Governors, and the State Board of Education a strategic plan for talent development to accomplish the goal established in s. [1004.013](#) to have 60 percent of working-age Floridians hold a high-value postsecondary credential by 2030. The strategic plan must, at a minimum:

- (a) Identify Florida's fastest-growing industry sectors and the postsecondary credentials required for employment in those industries.
- (b) Assess whether postsecondary degrees, certificates, and other credentials awarded by Florida's postsecondary institutions align with high-demand employment needs and job placement rates.
- (c) Identify strategies to deepen and expand cross-sector collaboration to align higher education programs with targeted industry needs.

(d) Establish targeted strategies to increase certifications and degrees for all populations with attention to closing equity gaps for underserved populations and incumbent workers requiring an upgrade of skills.

(e) Assess the role of apprenticeship programs in meeting targeted workforce needs and identify any barriers to program expansion.

(f) Identify common metrics and benchmarks to demonstrate progress toward the 60 percent goal and how the SAIL to 60 Initiative under s. [1004.013](#) can provide coordinated cross-sector support for the strategic plan.

(g) Recommend improvements to the consistency of workforce education data collected and reported by Florida College System institutions and school districts, including the establishment of common elements and definitions for any data that is used for state and federal funding and program accountability.

(h) Establish a timeline for regularly updating the strategic plan and the established goals.

(5) The Department of Economic Opportunity shall provide administrative support for the council.

History.—s. 13, ch. 2010-78; s. 5, ch. 2011-177; s. 7, ch. 2012-195; s. 8, ch. 2013-51; s. 57, ch. 2015-98; s. 18, ch. 2019-119.

Select Year:  

## The 2019 Florida Statutes

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[Title XLVIII](#)[Chapter 1004](#)[View Entire Chapter](#)[K-20 EDUCATION CODE](#)[PUBLIC POSTSECONDARY EDUCATION](#)**1004.013 SAIL to 60 Initiative.**—

- (1) The Strengthening Alignment between Industry and Learning (SAIL) to 60 Initiative is created to increase to 60 percent the percentage of working-age adults in this state with a high-value postsecondary certificate, degree, or training experience by 2030.
- (2) The State Board of Education and the Board of Governors shall work collaboratively to, at a minimum:
- (a) Increase the awareness and use of:
1. The student advising system established under s. [1006.735\(4\)\(b\)](#).
  2. The Complete Florida Degree Initiative established under s. [1006.735\(2\)](#) that facilitates degree completion for the state's adult learners. The Chancellor of the State University System and the Chancellor of the Florida College System shall consult with the Complete Florida Degree Initiative to identify barriers to program expansion and develop recommendations to increase the number of participating institutions and students served by the program. The recommendations must consider, at a minimum, methods for increasing outreach efforts to help students complete the "last mile" by providing financial assistance to students who are within 12 credit hours of completing their first associate or baccalaureate degree, but have separated from their institution of enrollment for more than one semester. Recommendations must be submitted to the Board of Governors, the State Board of Education, and the Governor no later than October 1, 2019.
  3. Summer bridge programs at state universities and Florida College System institutions that help students transition to postsecondary education.
- (b) Support and publicize the efforts of the Florida College Access Network in developing public and private partnerships to:
1. Increase the number of high school seniors who submit at least one completed postsecondary education application.
  2. Increase the number of high school seniors who submit a completed Free Application for Federal Student Aid to receive financial aid to help pay for their postsecondary education expenses.
  3. Recognize and celebrate high school seniors for their postsecondary education and career plans and encourage early preparation for college in accordance with s. [1001.43\(14\)](#).
  4. Conduct regional meetings with postsecondary educational institutions, business leaders, and community organizations to solve community-specific issues related to attainment of postsecondary certificates, associate degrees, and baccalaureate degrees.
- (c) Facilitate a reverse transfer agreement between the State Board of Education and the Board of Governors to award postsecondary education credentials to students who have earned them.
- (d) Facilitate the establishment of career pathways agreements between career centers and Florida College System institutions pursuant to s. [1007.233](#).

(e) Develop a systematic, cross-sector approach to awarding credit for prior learning.  
History.—s. 17, ch. 2019-119.

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**Economic and Workforce Trends**  
Bureau of Workforce Statistics and Economic Research  
Adrienne Johnston, Bureau Chief



October 2019

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## **Bureau of Workforce Statistics and Economic Research**

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**Our mission is to produce, analyze and deliver labor statistics  
to improve economic decision-making**

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- Employment data are the state's most important economic indicators.
- Data collected under Federal/State Cooperative Statistical Programs.
- Comparable nationwide for all states, counties and metro areas.
- Collected through a combination of employer surveys, modeling and administrative records.

**Thanks to Florida employers, without them we would not be able to  
provide data.**

# Sustained Growth in Employment

Florida - Total Nonagricultural Employment

Employment (Seasonally Adjusted)



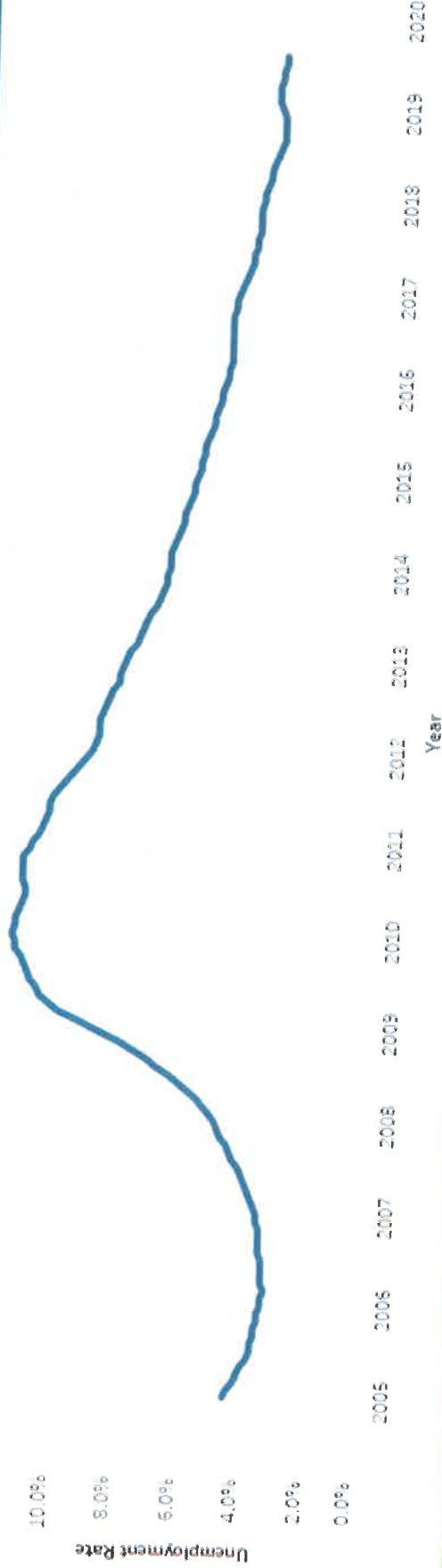
Over the Year Percent Change (Seasonally Adjusted)



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

# Consistent Reduction in Unemployment

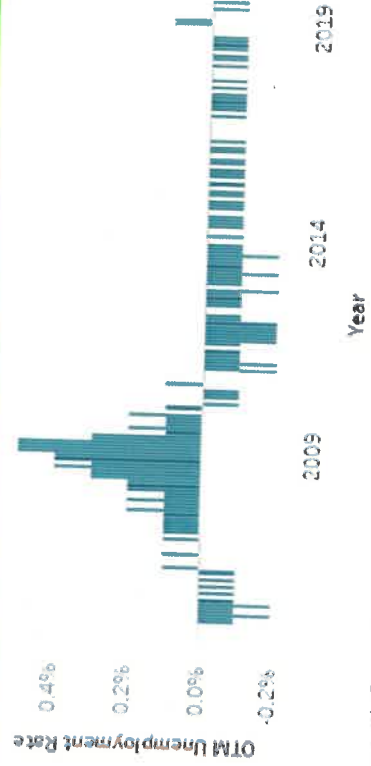
Unemployment Rate - Florida  
(Seasonally Adjusted)



Unemployment Rate Over-the-Year Change - Florida  
(Seasonally Adjusted)



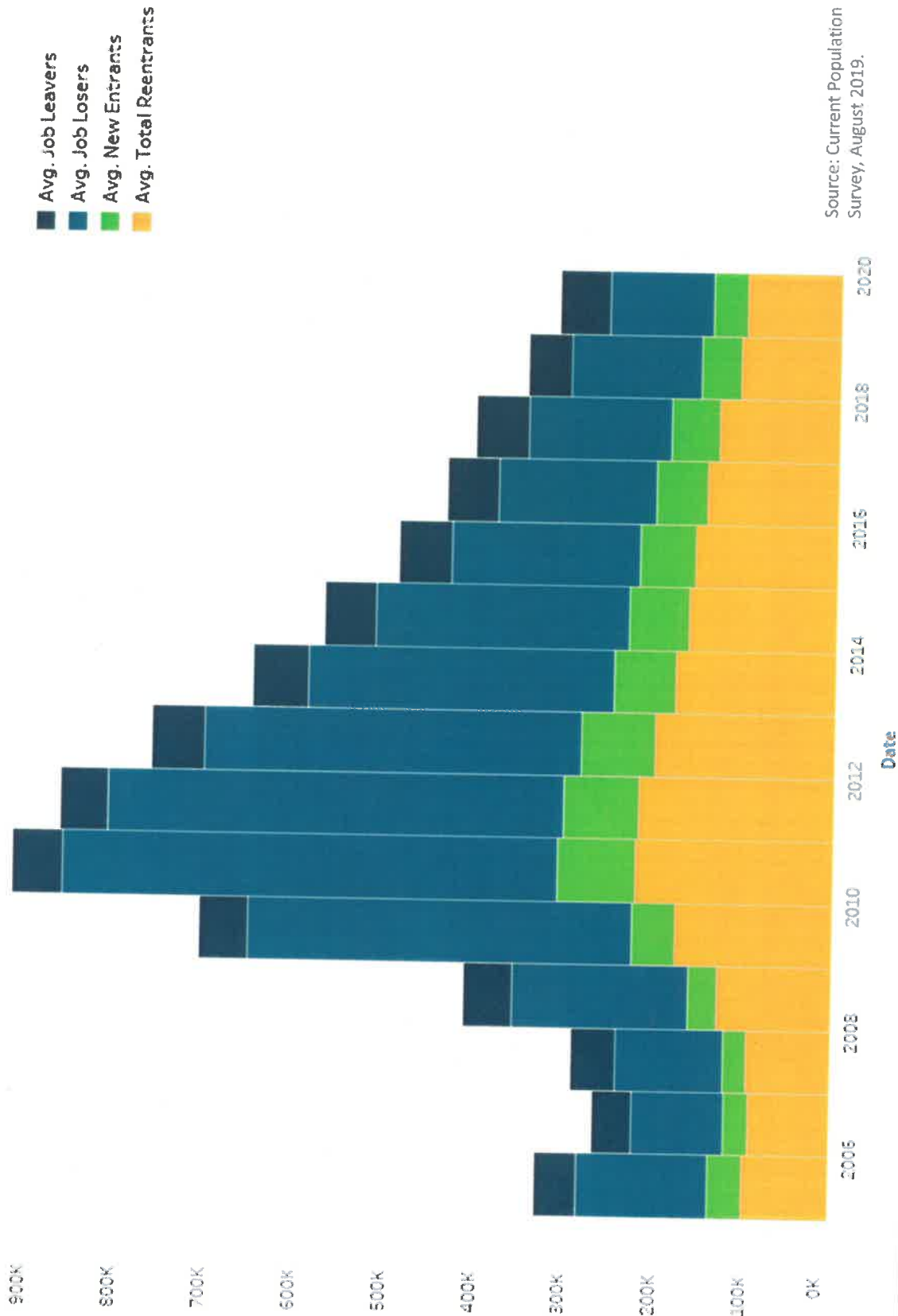
Unemployment Rate Over-the-Month Change - Florida



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

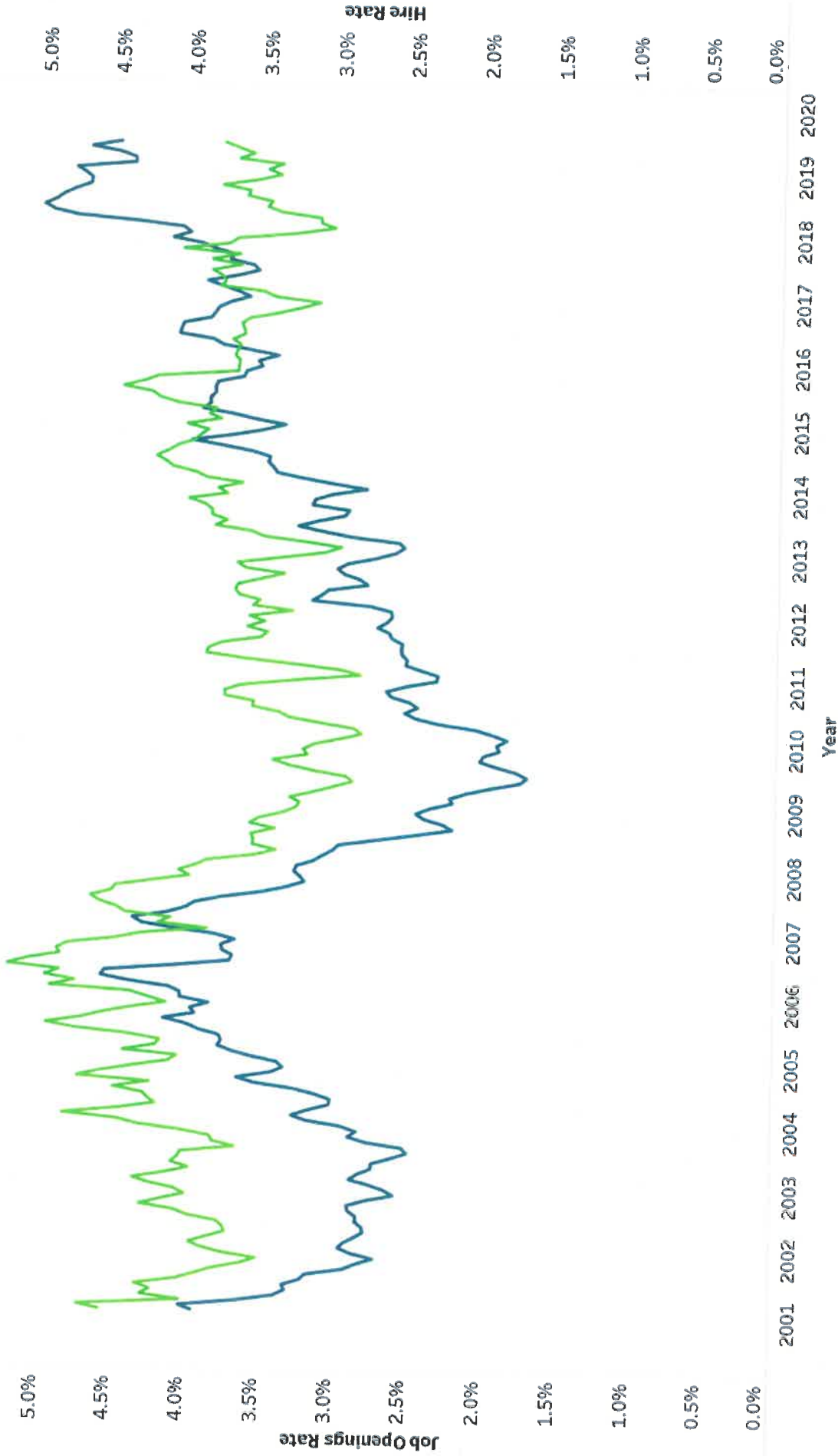


# Who is Unemployed?



Source: Current Population Survey, August 2019.

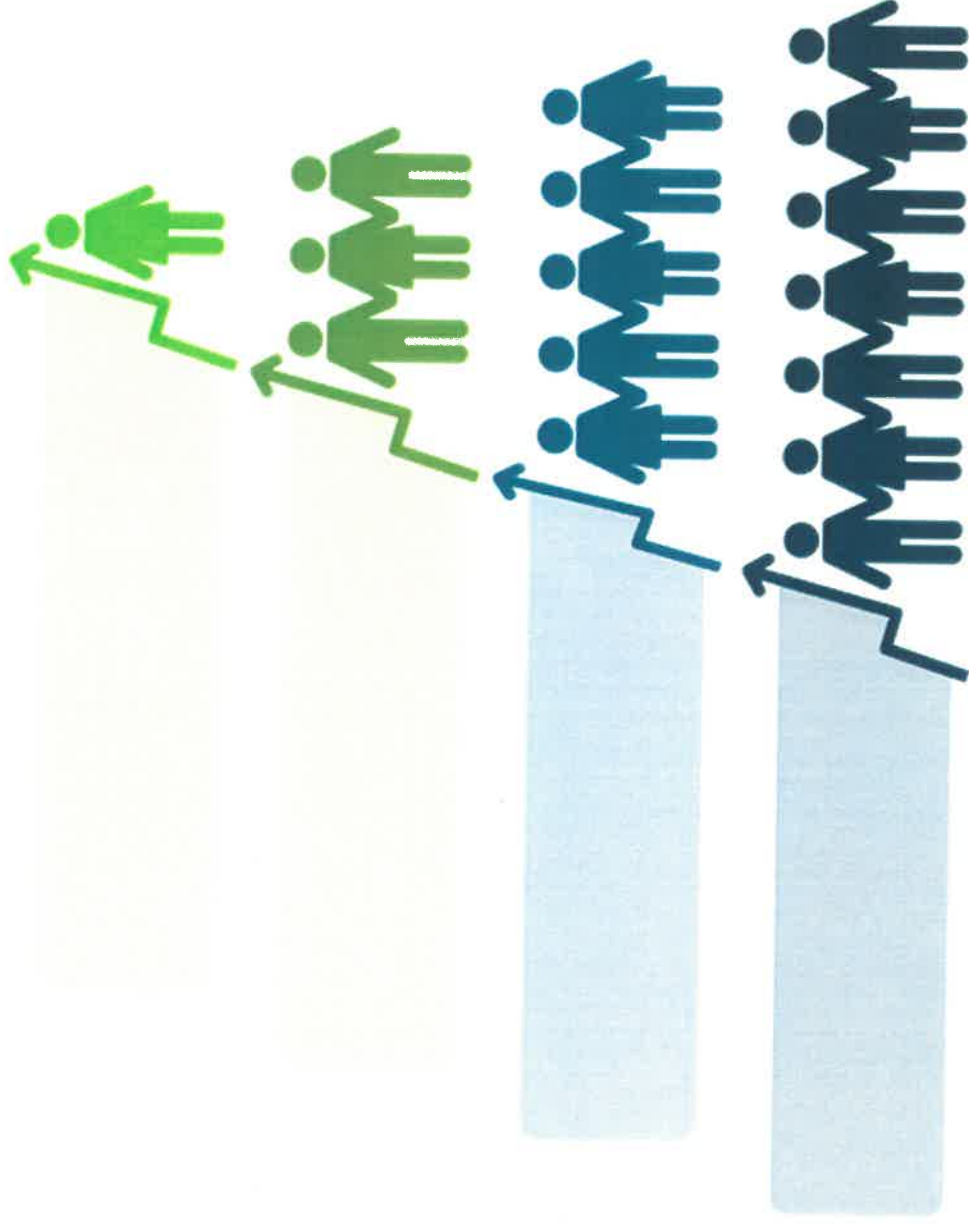
# Job Openings have Surpassed Hires



Source: Bureau of Labor Statistics, Job Opening and Labor Turnover Survey.



# Job Roles in Florida's Economy

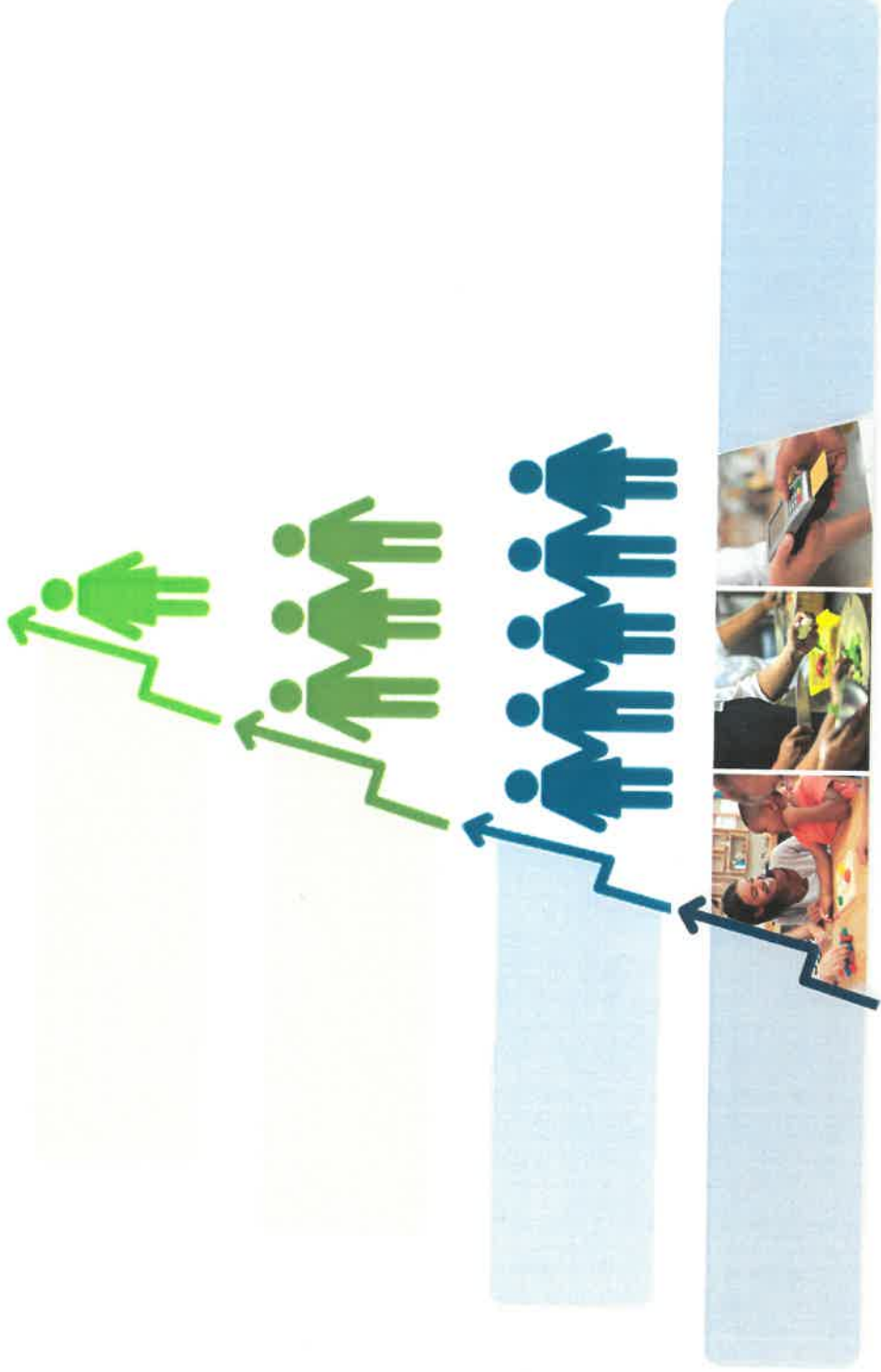


# Job Roles in Florida's Economy

## Face of Florida

### Sales / Maintenance / Entertainment / Basic Services

This segment serves to support the primary source of state revenue through sales tax collection.



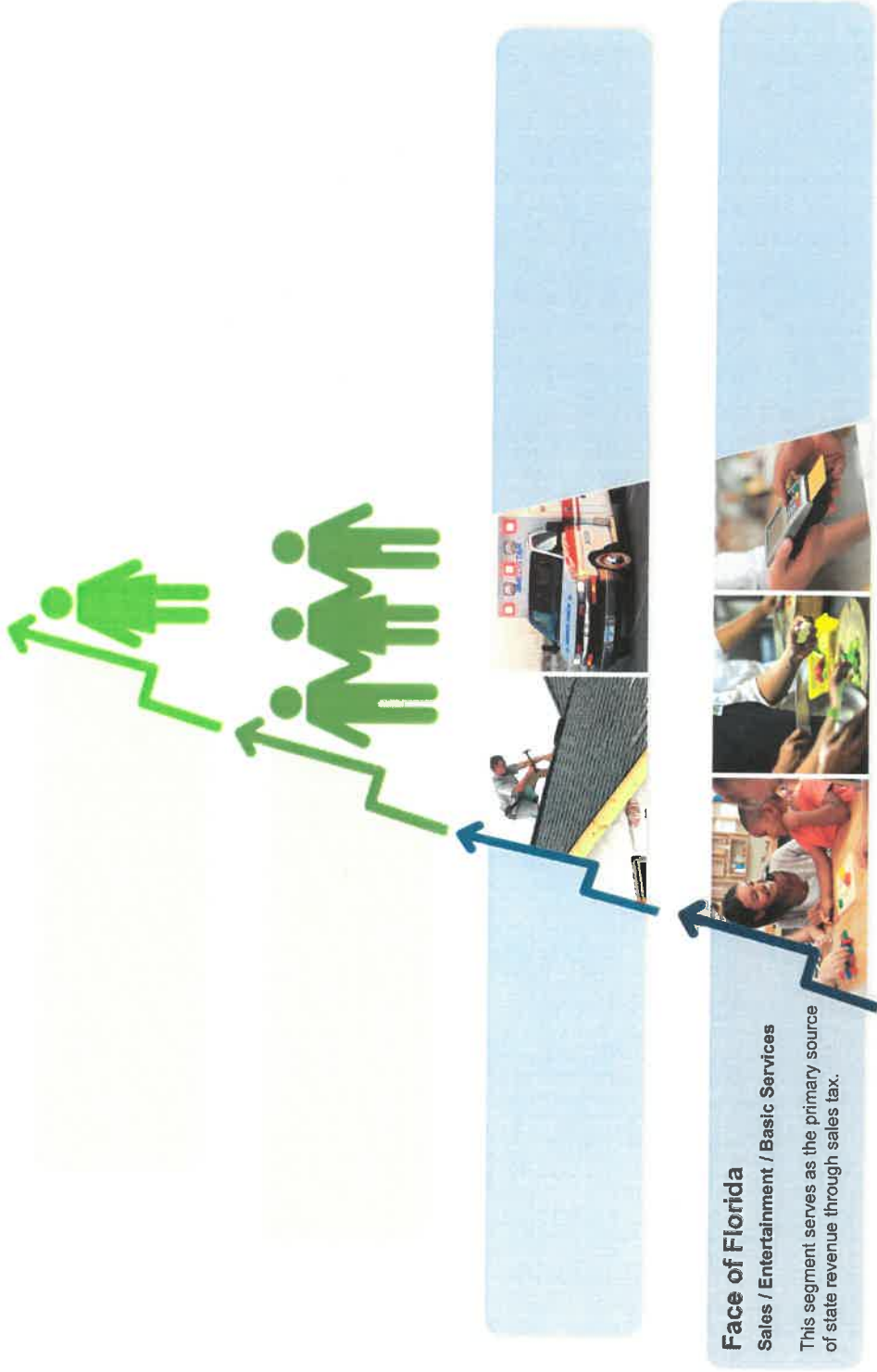


# Job Roles in Florida's Economy

## Protect Florida

### Emergency Services / Trades / Repair

This segment provides essential services necessary for any community to function and grow.





# Job Roles in Florida's Economy

## Inform Florida

### Teachers / Counselors / Professional Services

This segment ensures citizens have information, education and services needed for a high quality of life.



## Protect Florida

### Emergency Services / Trades / Repair

This segment provides essential services necessary for any community to function and grow.



## Face of Florida

### Sales / Entertainment / Basic Services

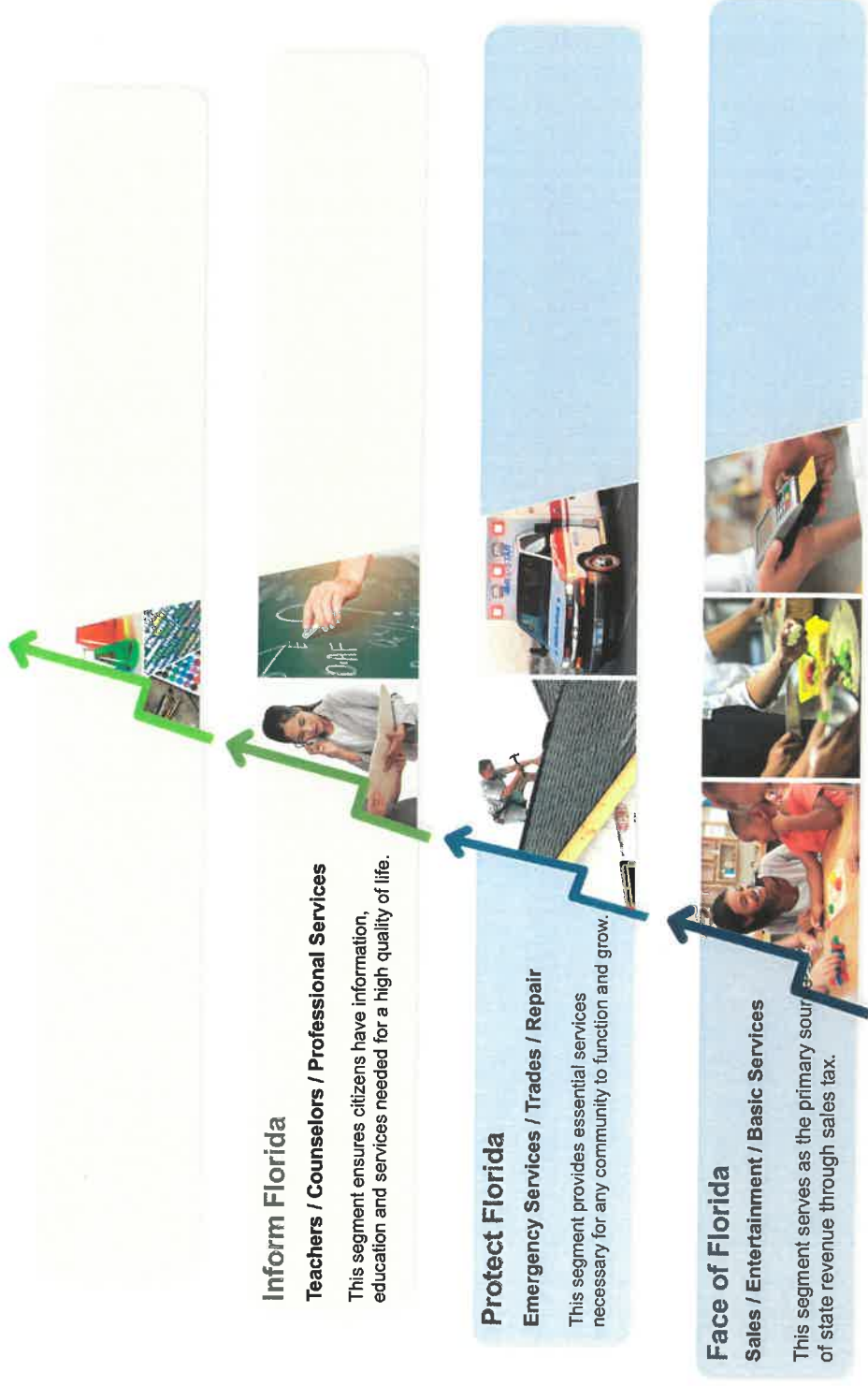
This segment serves as the primary source of state revenue through sales tax.

# Job Roles in Florida's Economy

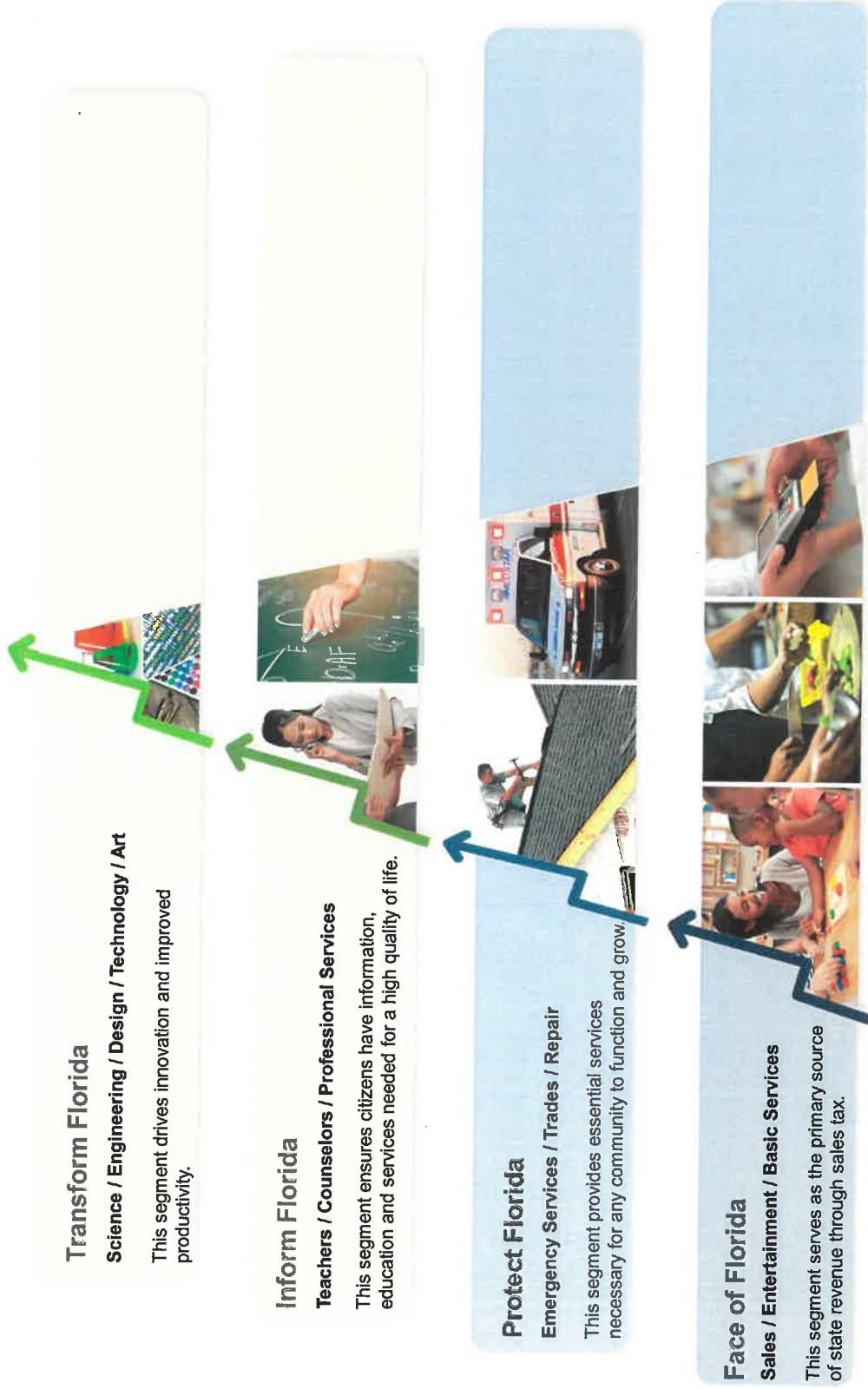
## Transform Florida

### Science / Engineering / Design / Technology / Art

This segment drives innovation and improved productivity.



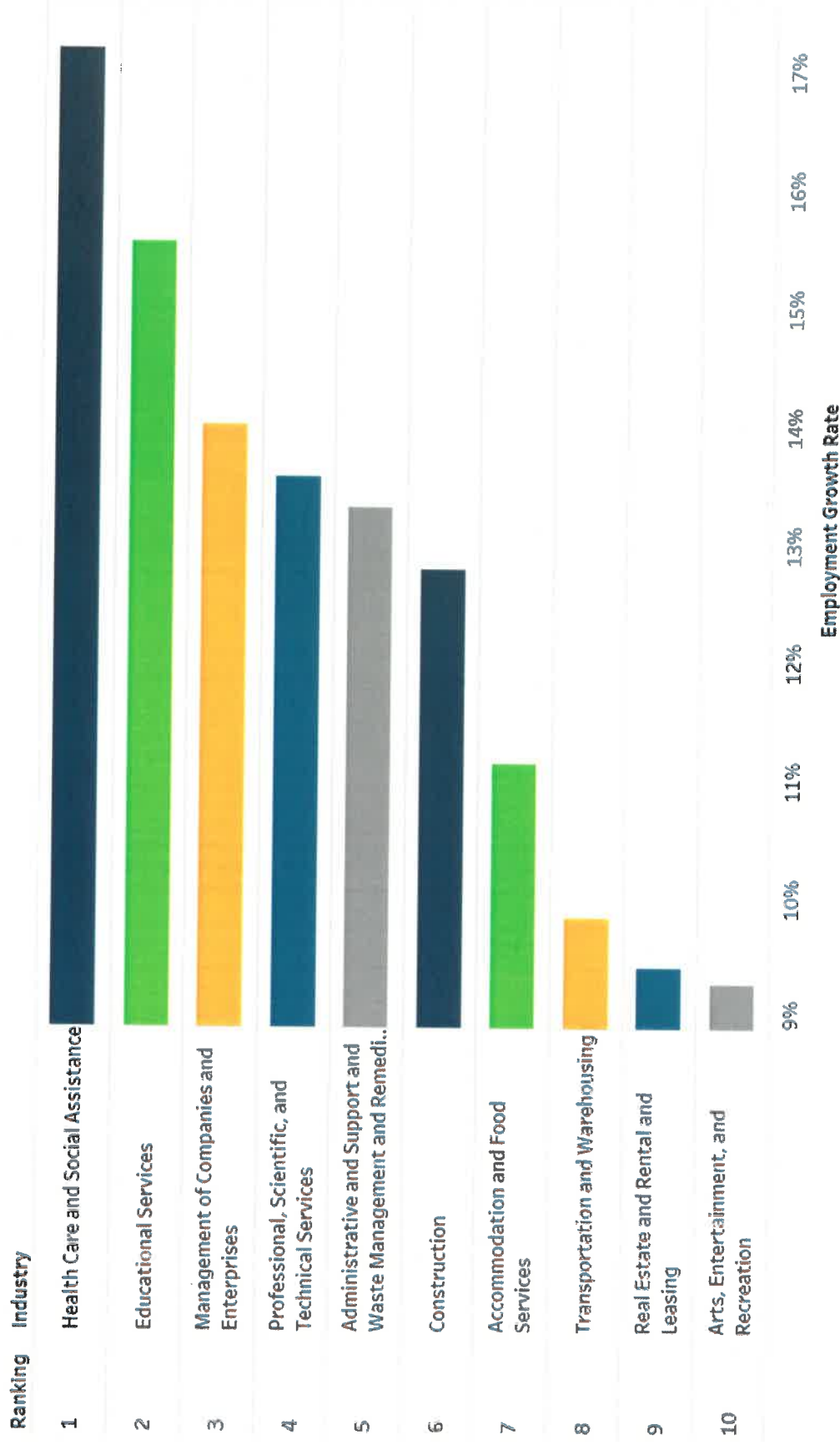
# Job Roles in Florida's Economy





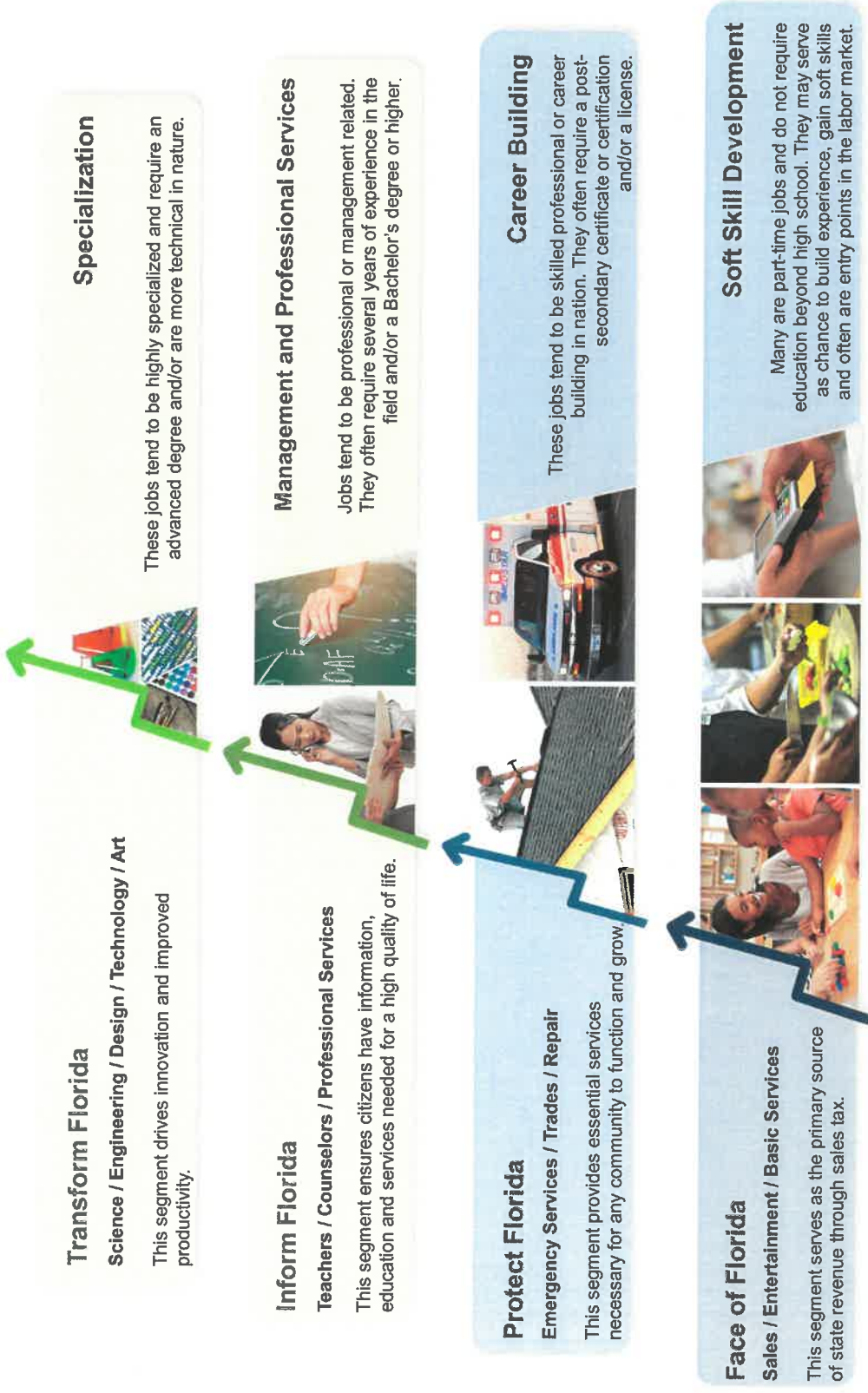
# Fastest Growing Industries

## Top Industries by Employment Growth Rate Florida

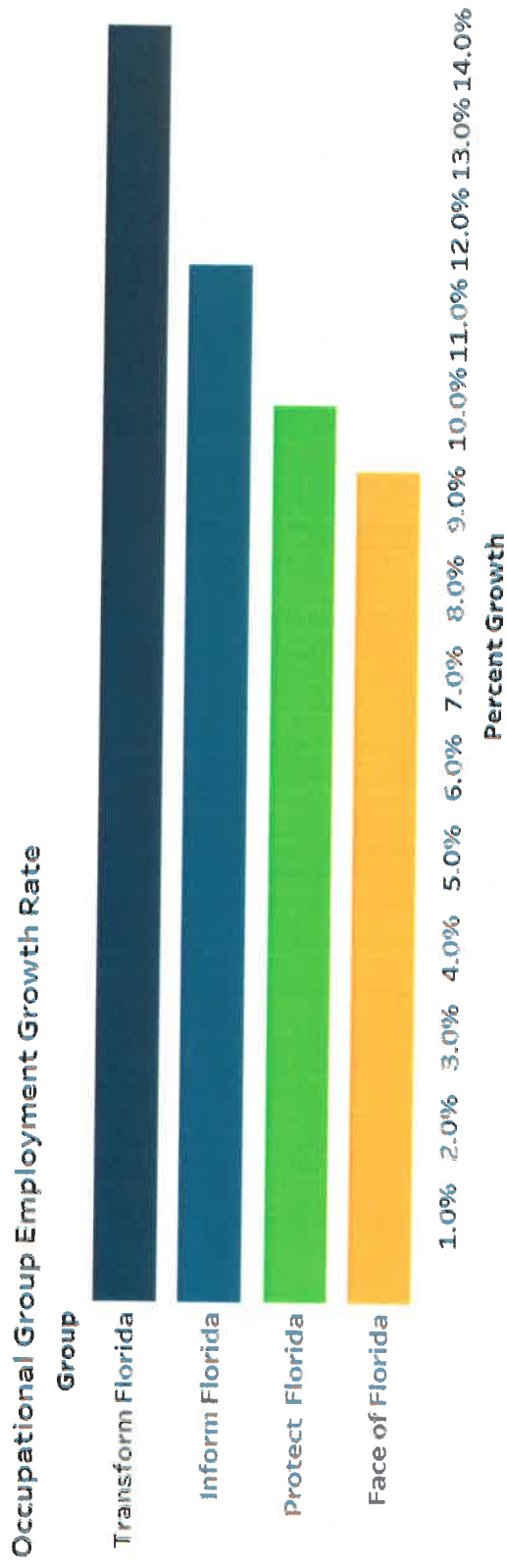
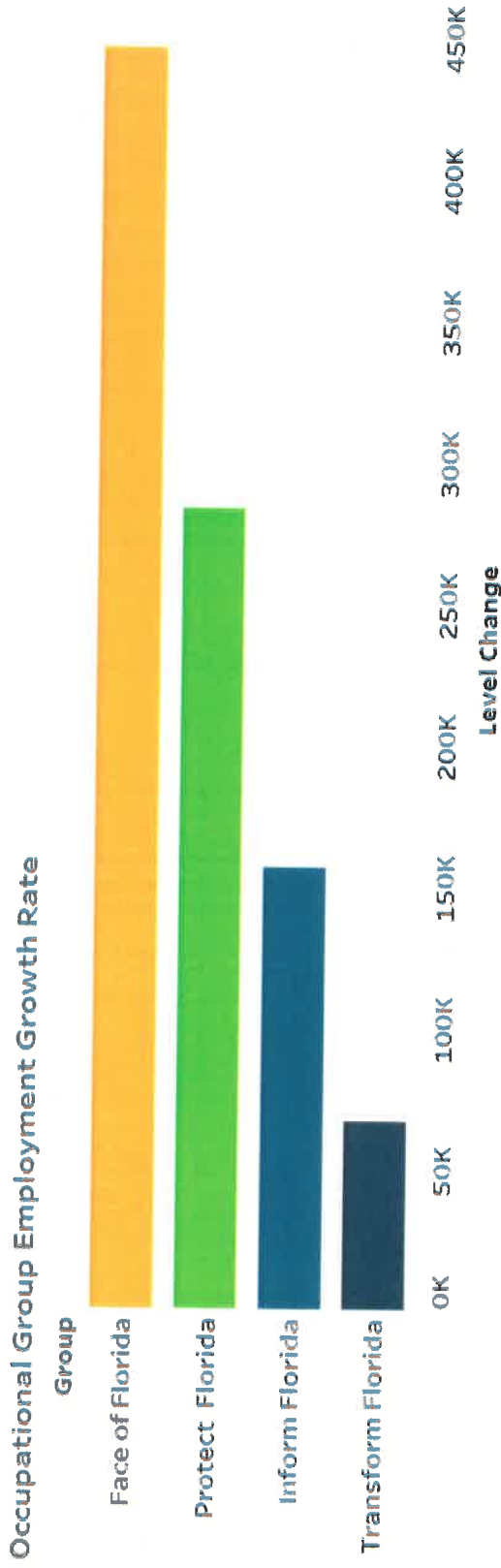


Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research, Occupational and Industry Employment Projections 2018-2026.

# Job Roles in Florida's Economy



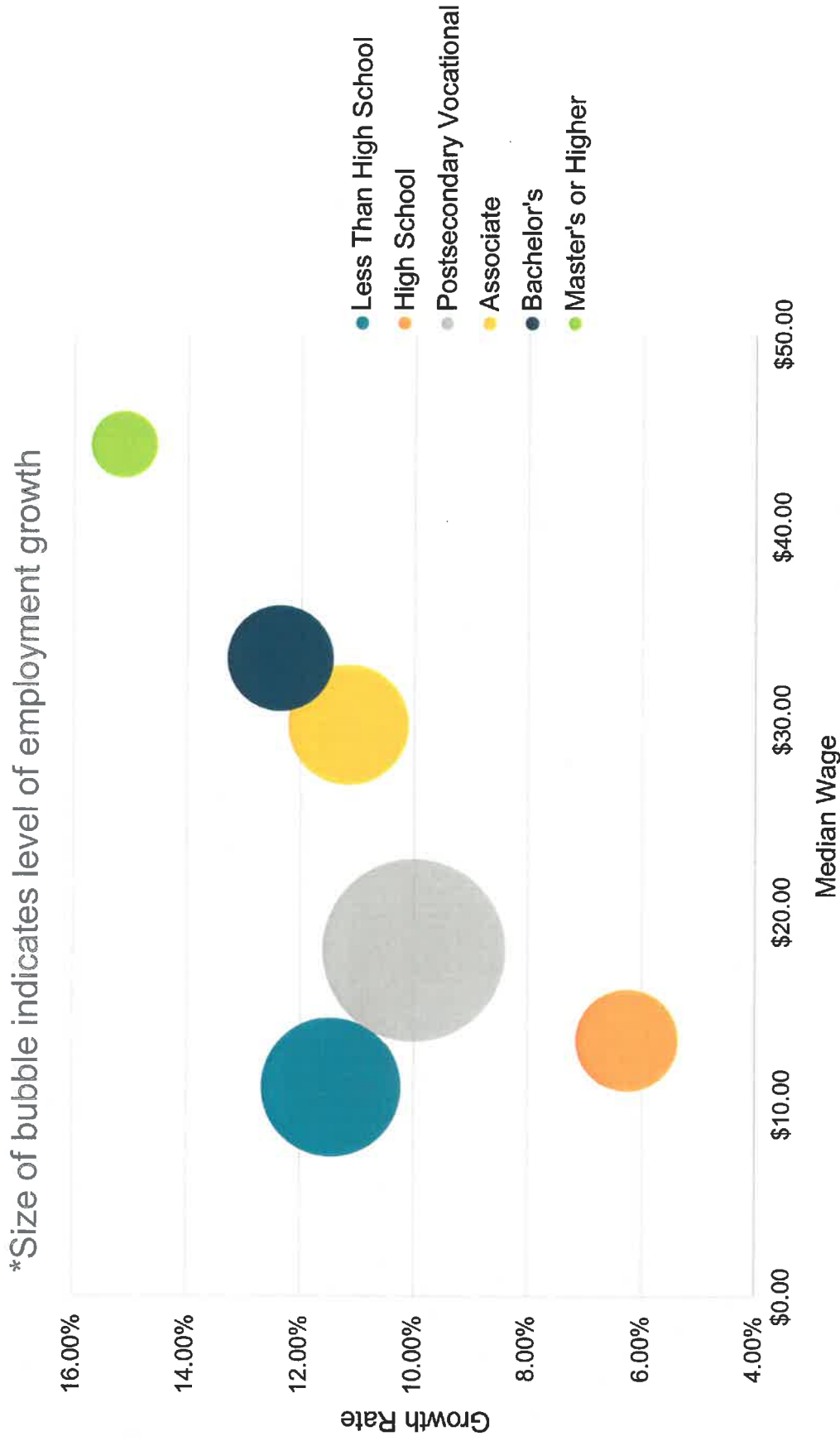
# Occupational Projections – Employment Changes 2018-2026



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.



# Florida's Job Growth and Wage by Training Level



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

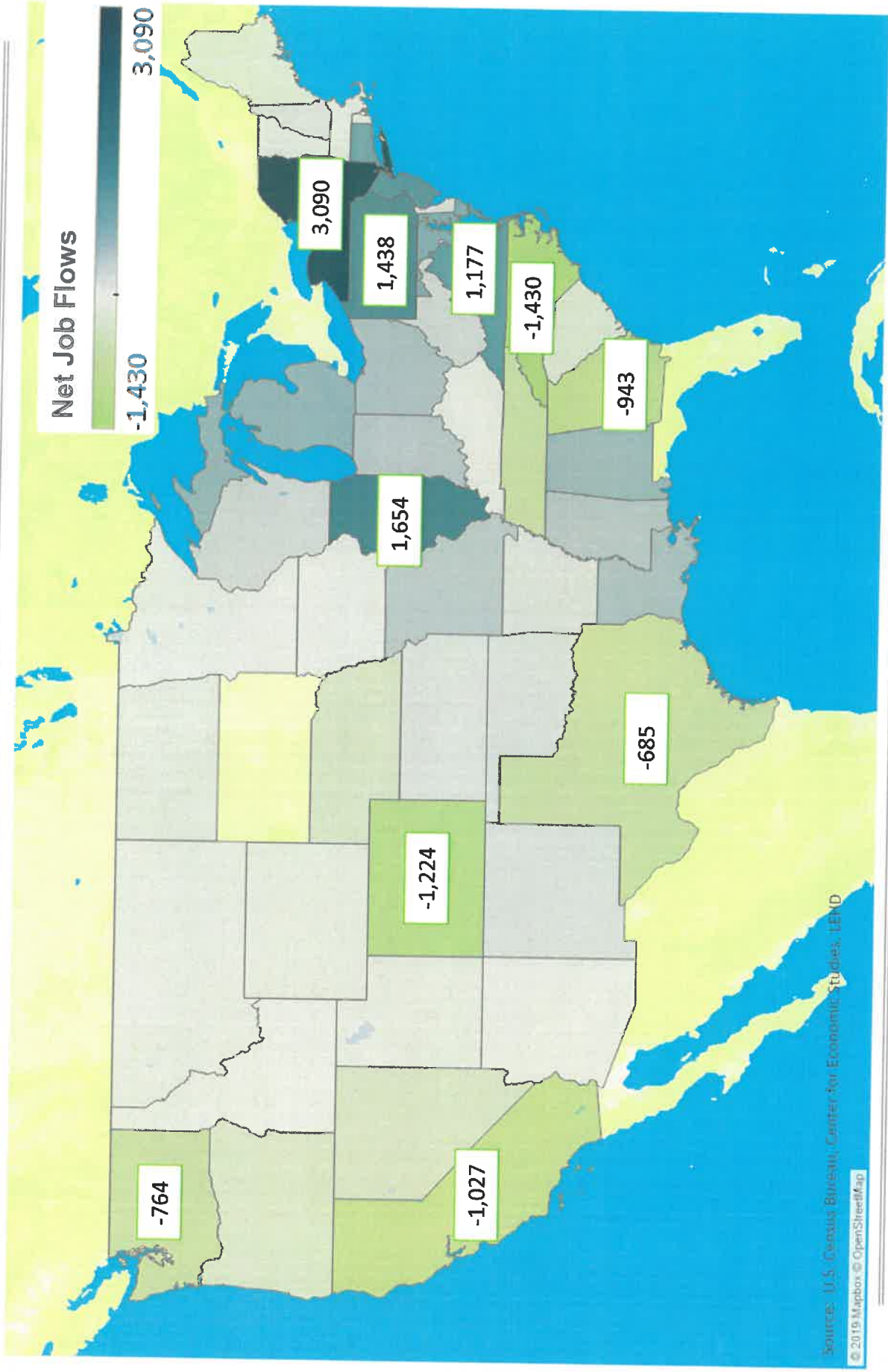
# Businesses Adjust to the Labor Market



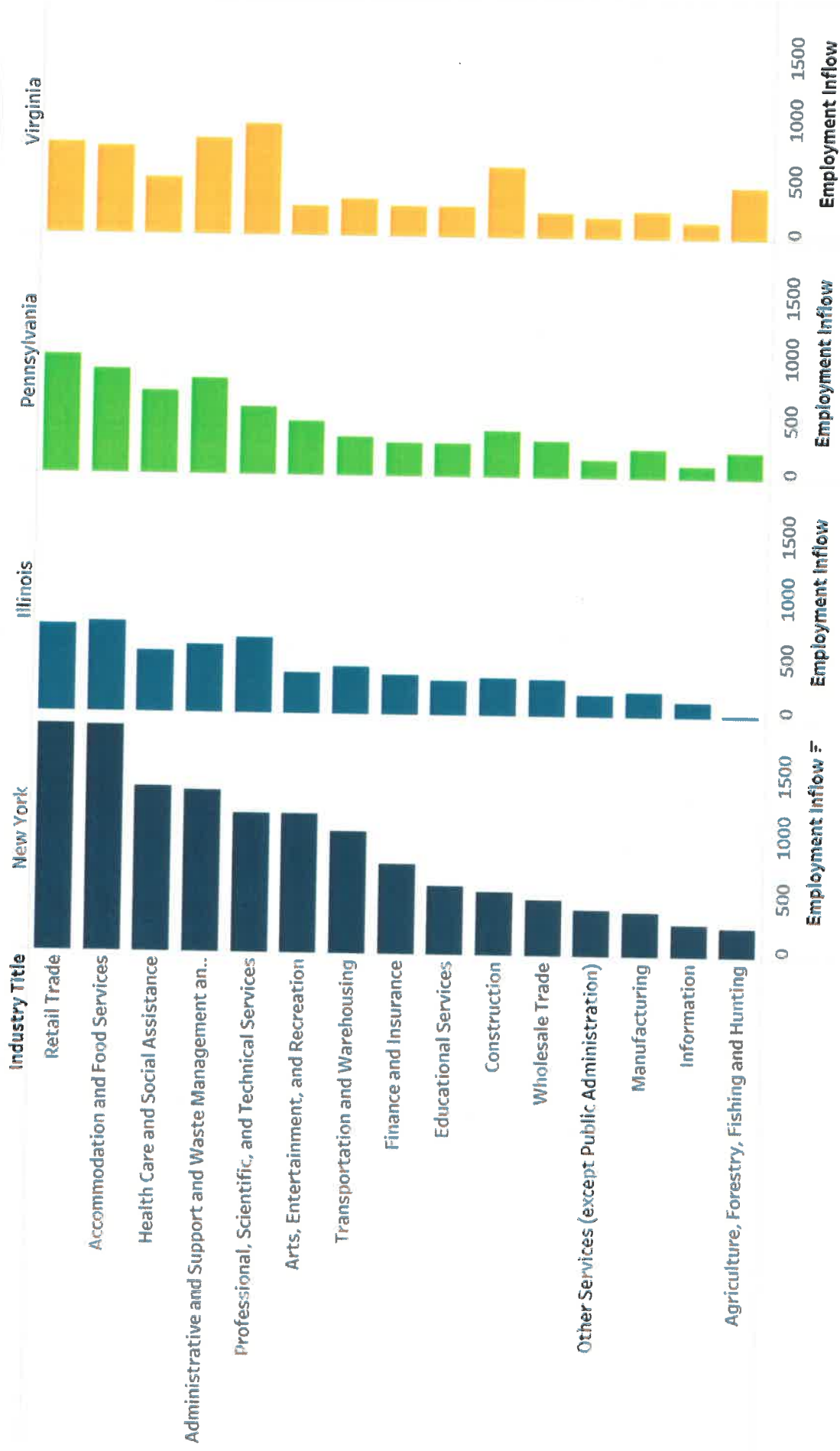
Employers were asked to provide detailed requirements for each job vacancy.

	<h2>Experience</h2> <p>80% Required less than 2 years</p>
	<h2>Education</h2> <p>1/3 Required Training above HS</p>
	<h2>Certification</h2> <p>35% Required a Certification/License</p>

# Who Comes and Leaves Florida for Work - 2017

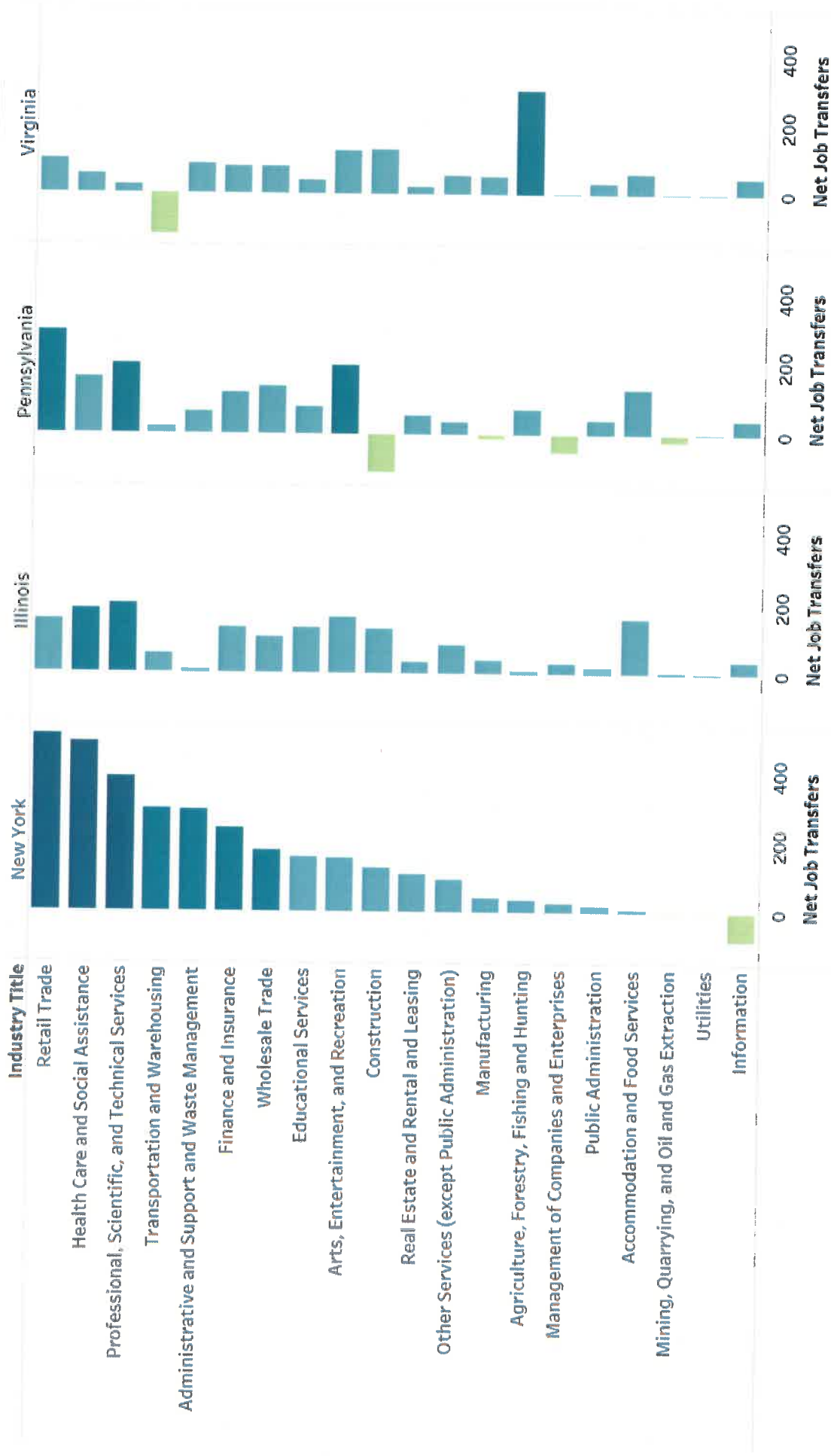


# Total Job Gains From Top 4 States- 2017



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

# Net Job Gains From Top 4 States- 2017

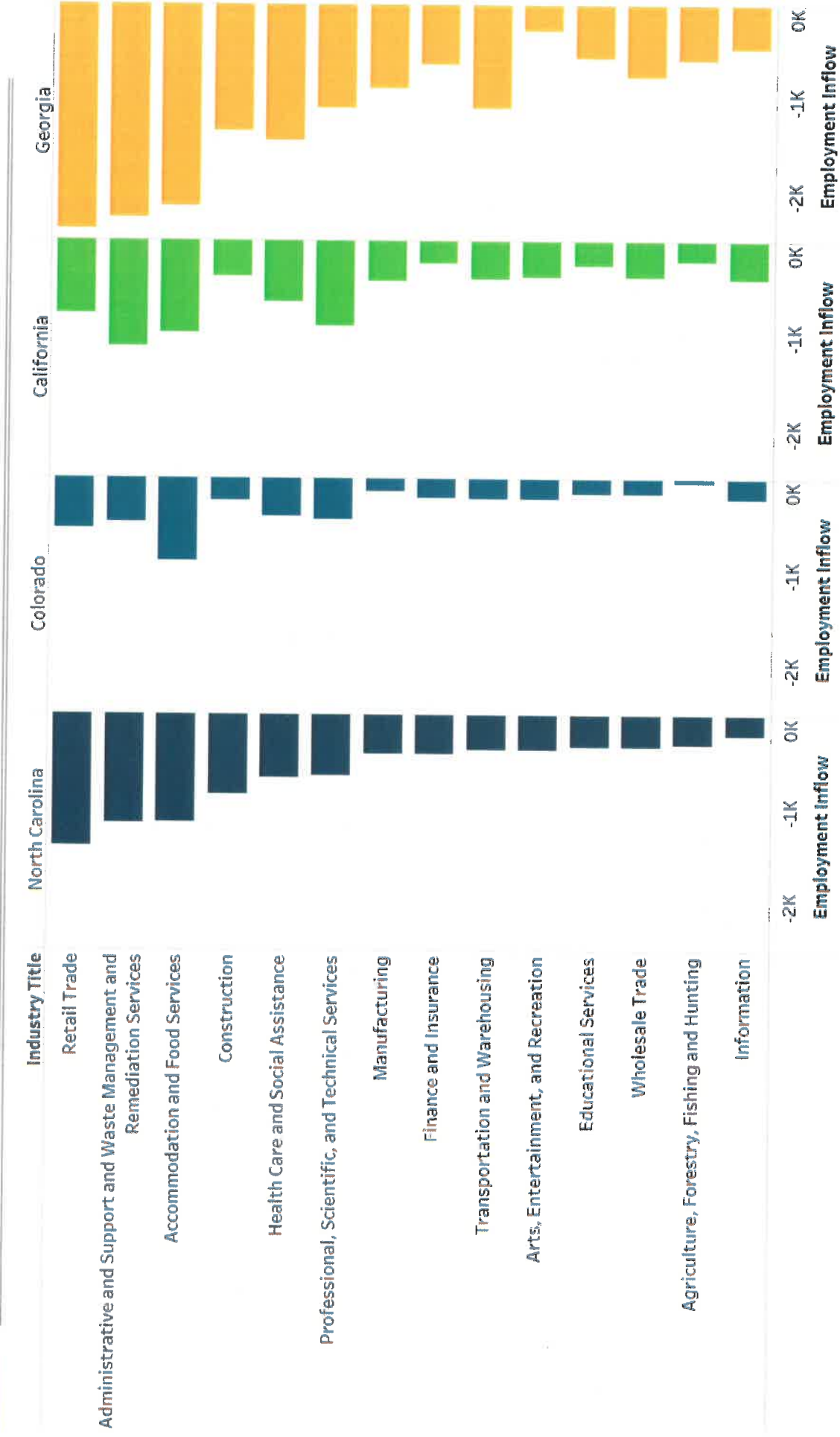


Source: U.S. Census Bureau, Center for Economic Studies, LEHD



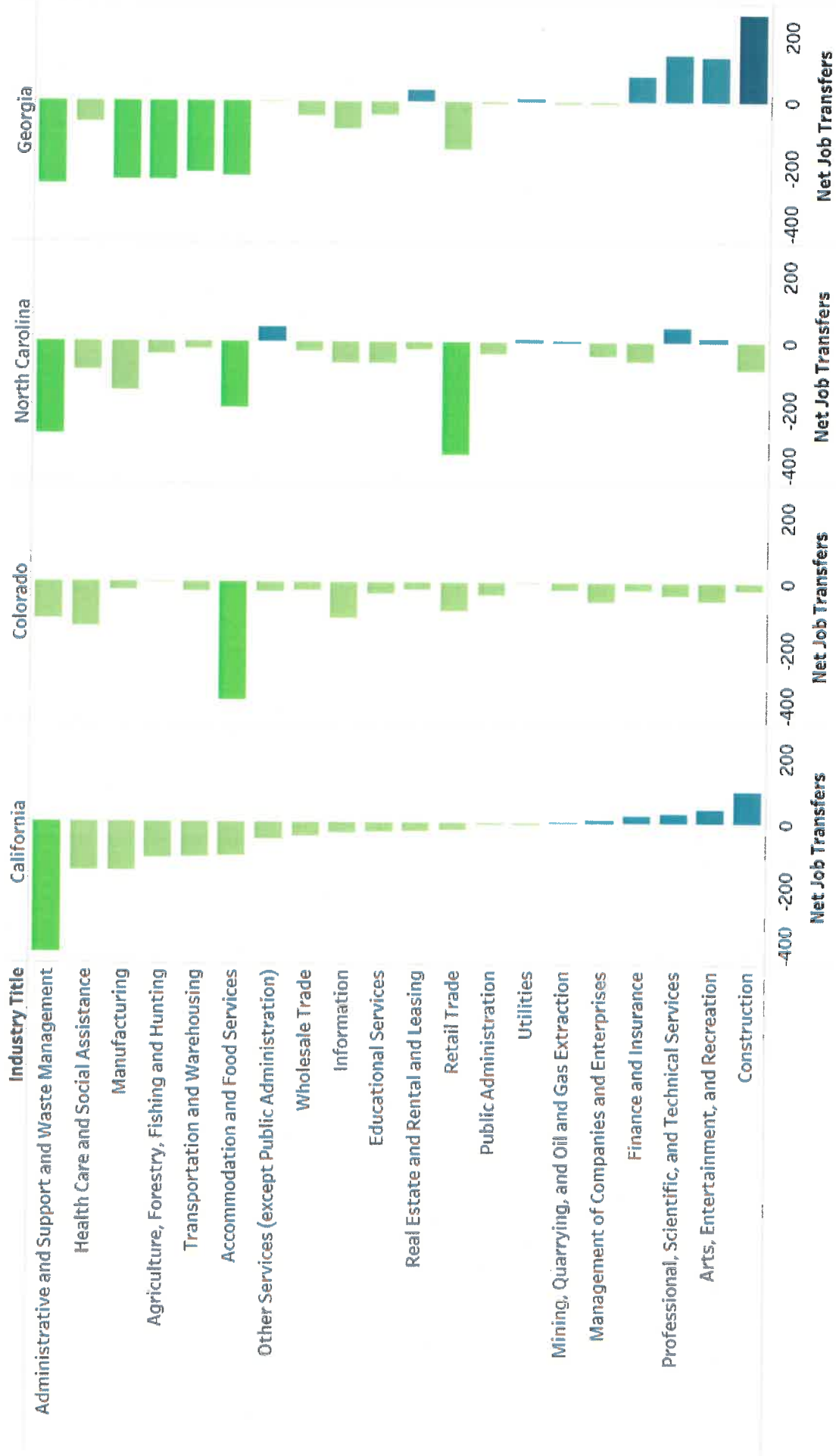


# Total Job Losses To Top 4 States- 2017



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

# Net Job Losses To Top 4 States- 2017



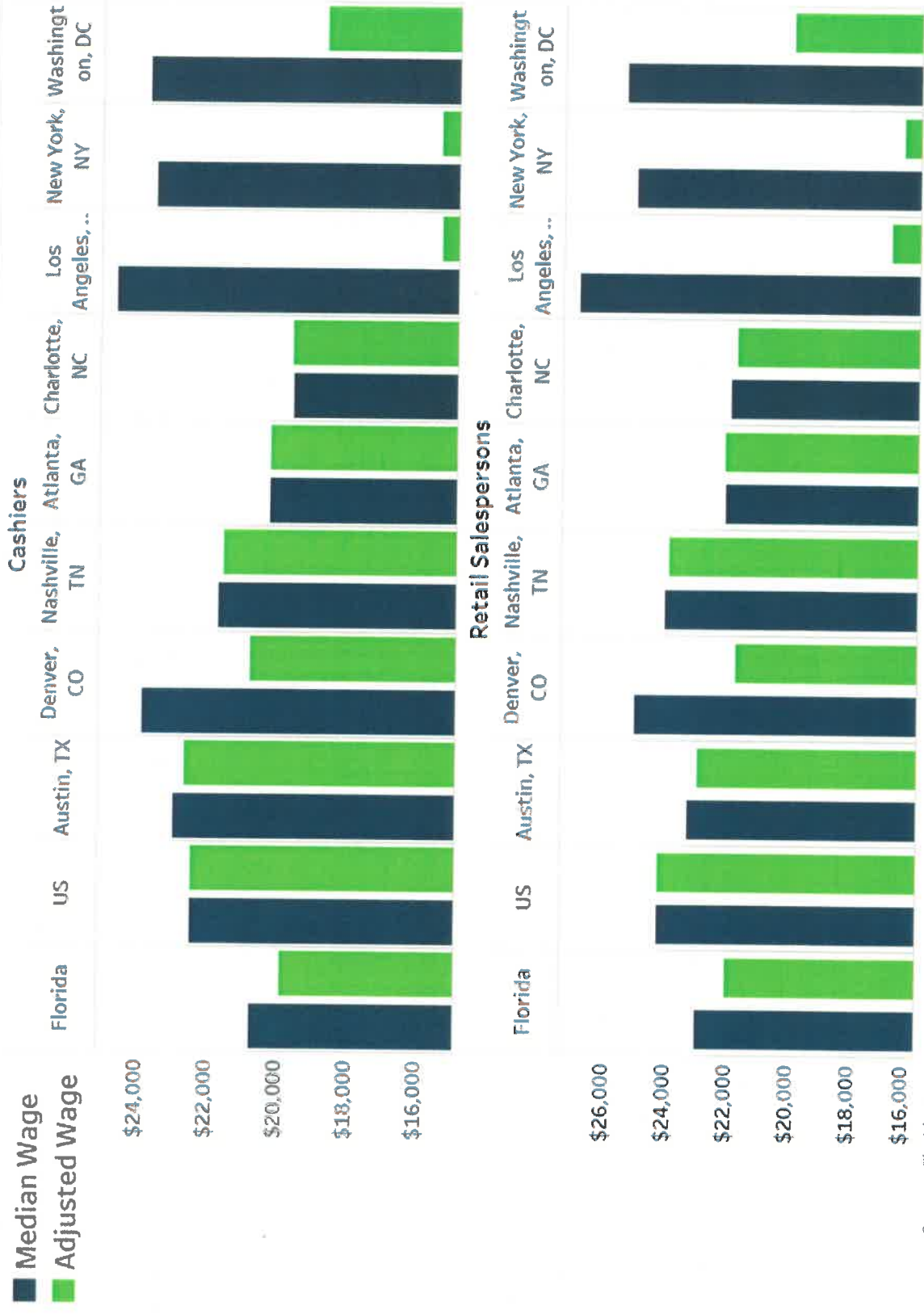
Source: U.S. Census Bureau, Center for Economic Studies, LEHD

# Workforce Potential Supply Gap in Florida

Occupation Title	2018-2026		2018-2026	
	Total Openings	Total Enrolled Supply	Average Annual Openings	Total Enrolled Supply
Structural Iron and Steel Workers	5,493	0	687	97
Carpenters	63,636	67	7,955	430
First-Line Supervisors of Construction Trades and Extraction Workers	50,202	62	6,275	142
Operating Engineers and Other Construction Equipment Operators	19,628	36	2,454	150
Mobile Heavy Equipment Mechanics, Except Engines	5,088	15	636	74
Plumbers, Pipefitters, and Steamfitters	30,261	101	3,783	2,291
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	16,127	120	2,016	716

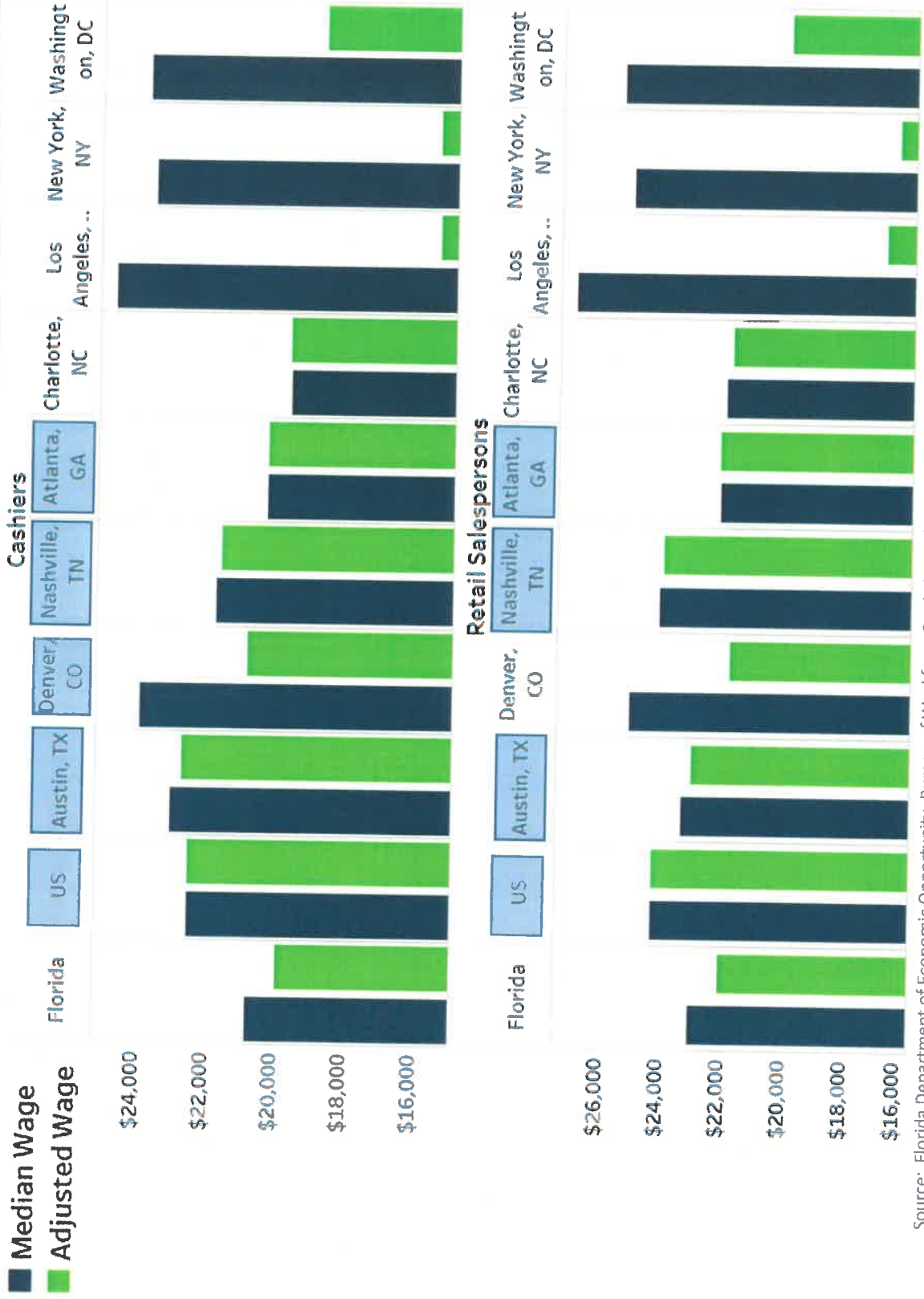
Sources: FL Department of Economic Opportunity (DEO), Bureau of Workforce Statistics and Economic Research; FL Department of Education; FL State University System; FL Commission of Independent Education. Prepared January 2019.

# Cost of Living Comparisons – Face of Florida



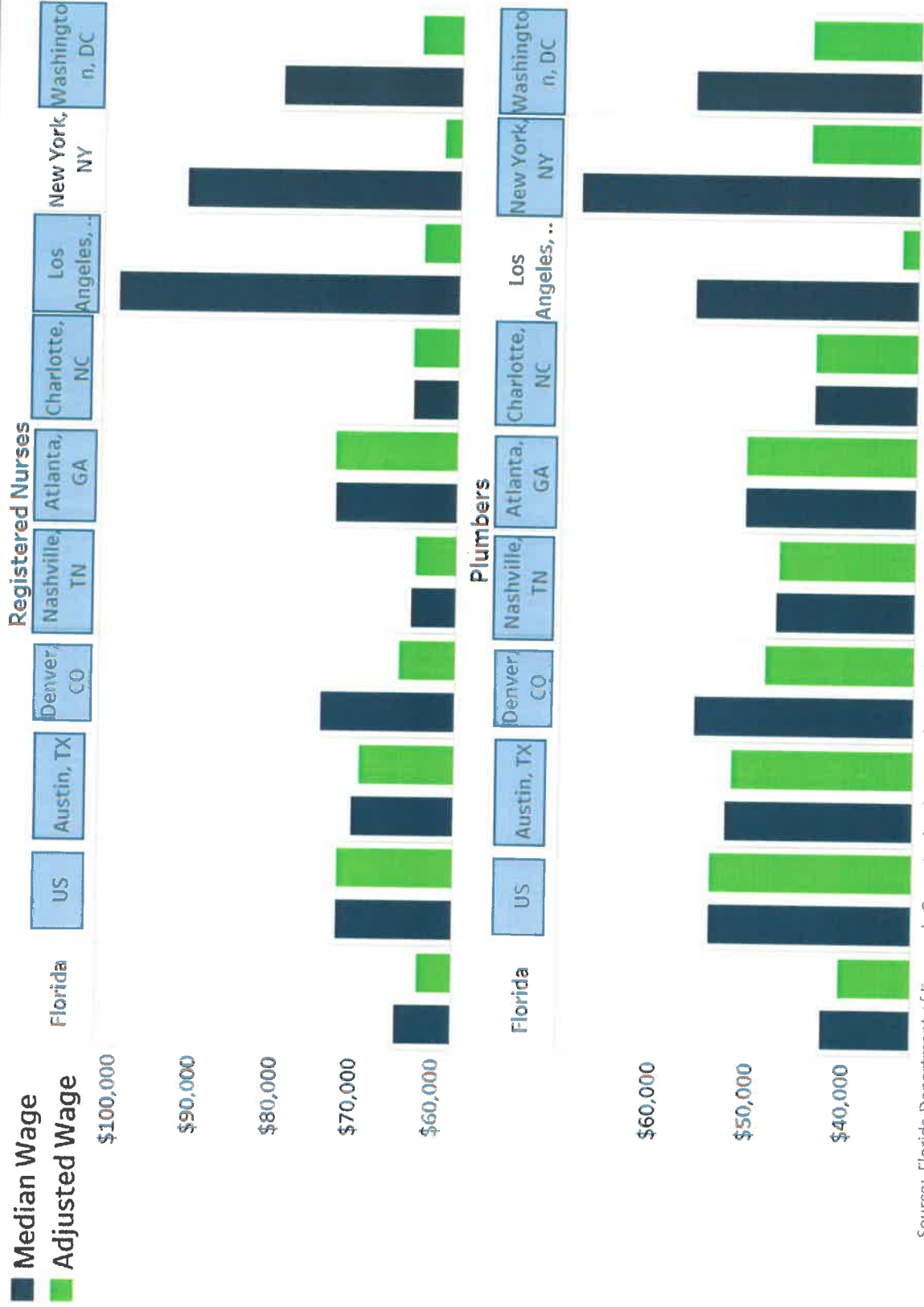
Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

# Cost of Living Comparisons – Face of Florida



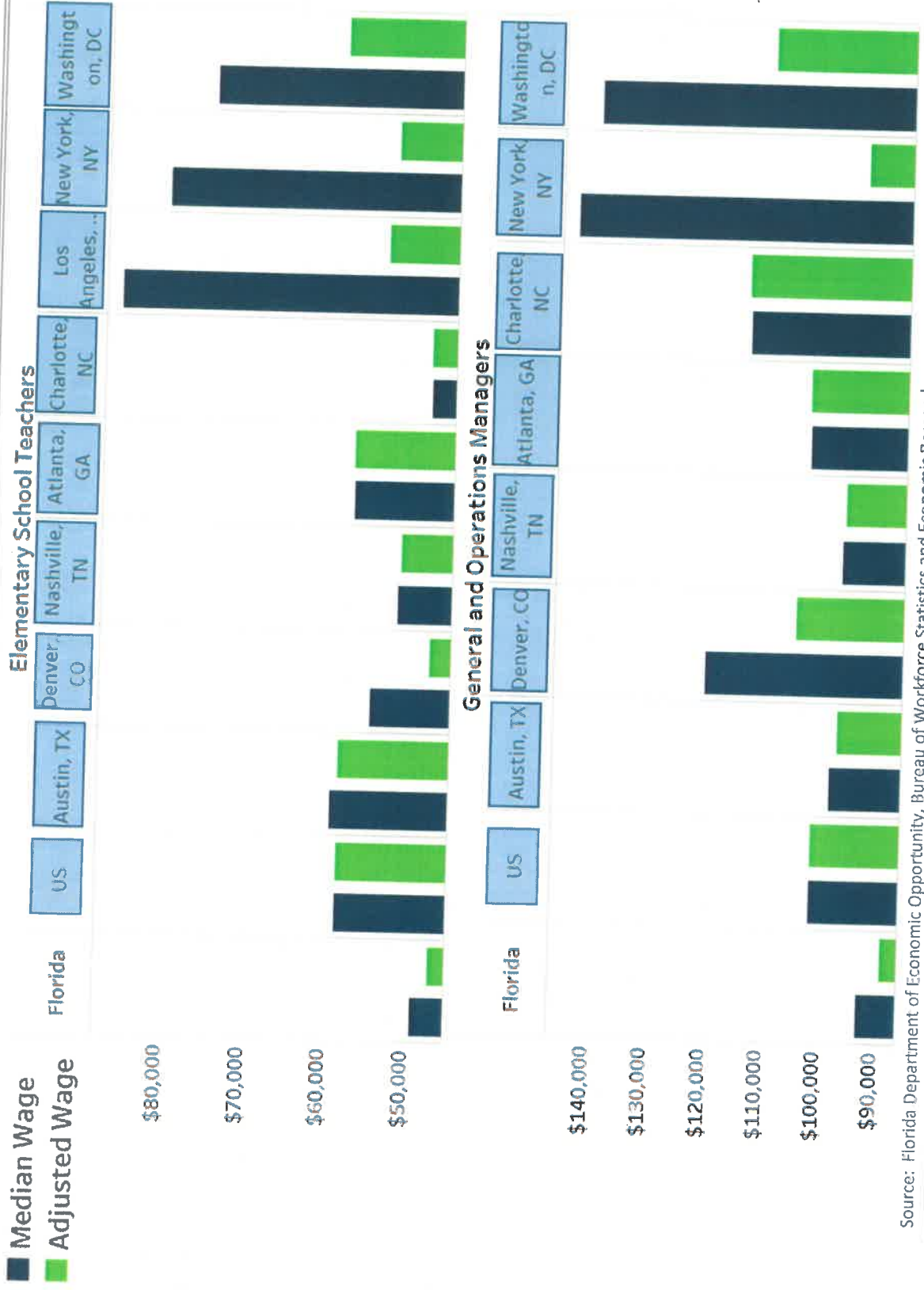
Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

# Cost of Living Comparisons – Protect Florida



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

# Cost of Living Comparisons – Inform Florida



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

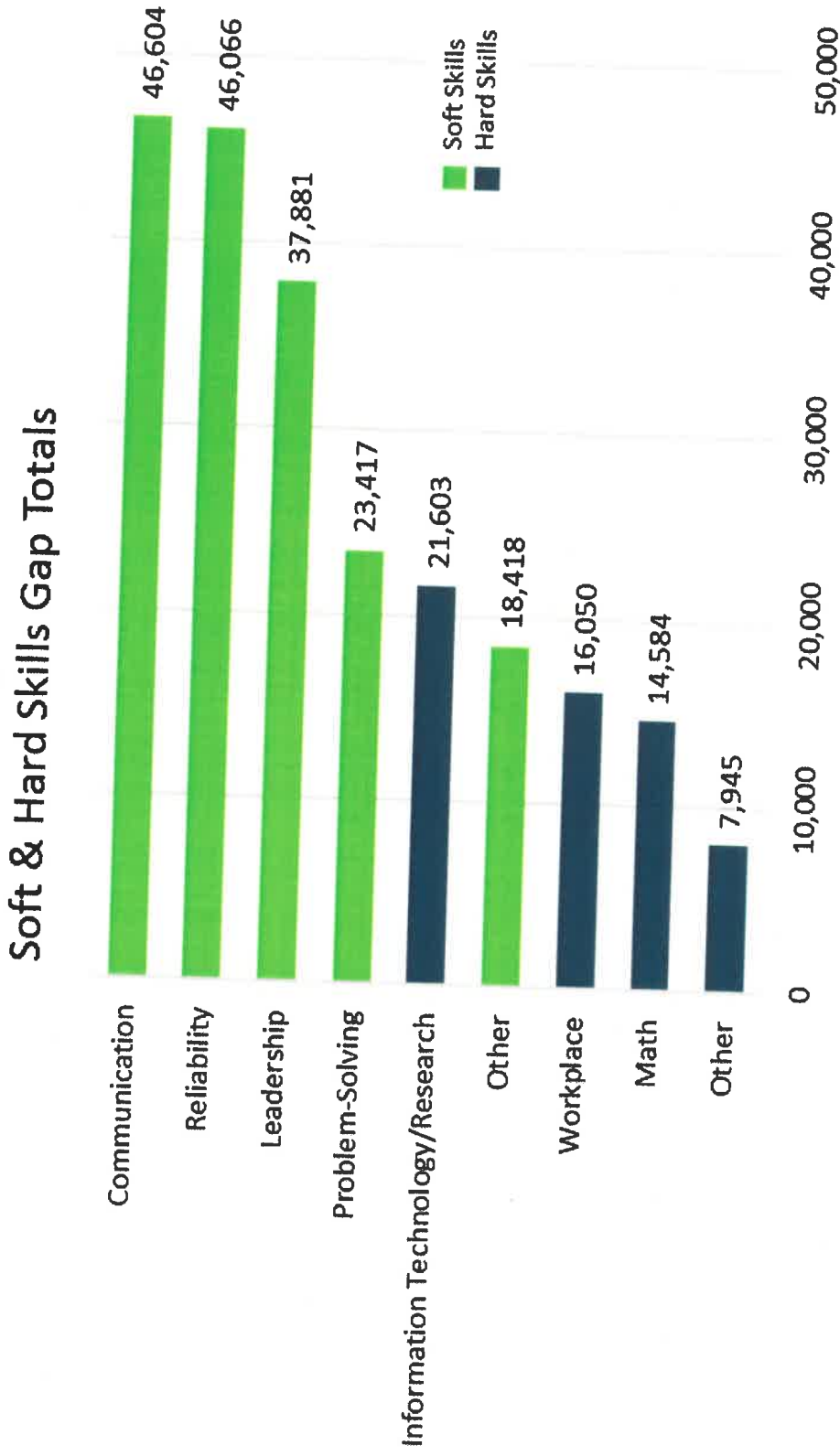
# Cost of Living Comparisons – Transform Florida



Source: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.

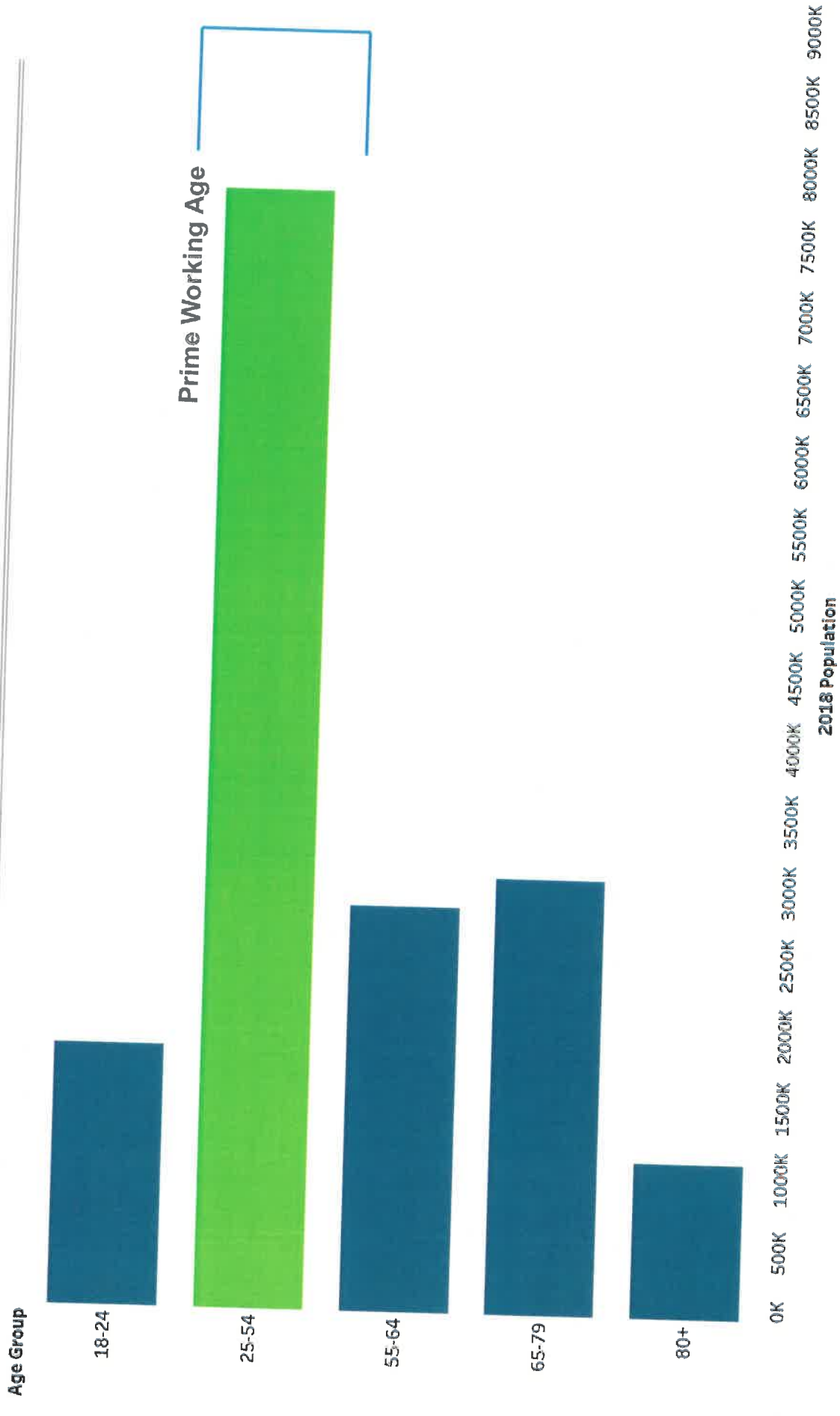


# Workers Lack Soft Skills More Often than Hard Skills



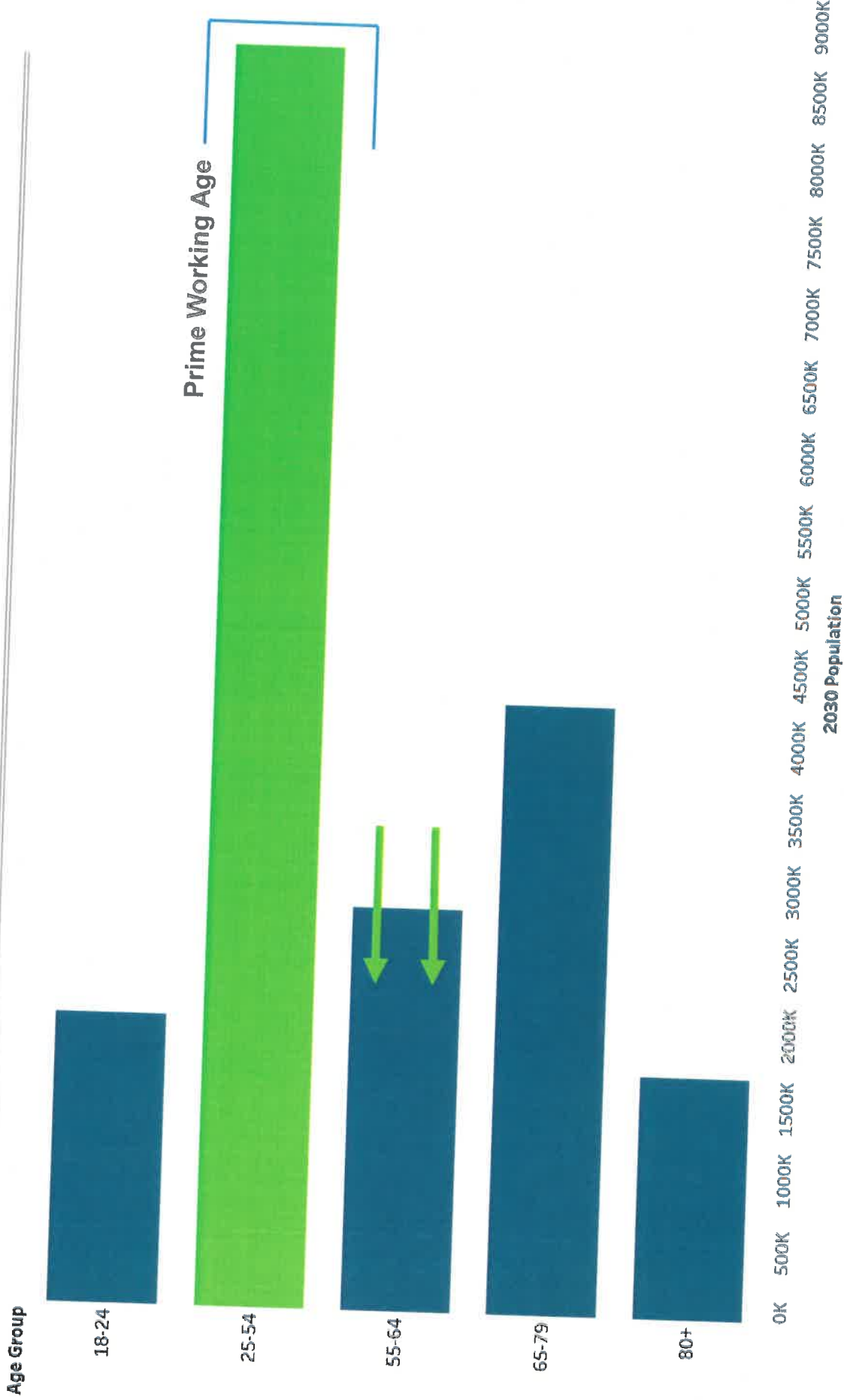
Source: Skills Gap and Job Vacancy Survey, Florida Department of Economic Opportunity, Bureau of Labor Market Statistics

# 2018 Population by Age Group - Florida



Source: U.S. Census Bureau, Center for Economic Studies, LEHD (2017 Data )

# 2030 Population by Age Group - Florida



Source: Source: U.S. Census Bureau, Center for Economic Studies, LEHD (2017 Data )



## **Future of Work**

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- **Task Automation**
- **Machine Learning / Artificial Intelligence**
- **Autonomous Vehicles**
- **Platforms for Gig Work**
- **Improved Mobile Technology**
- **Changes in Employer / Employee Relationships**
- **Demographic Shifts**
- **Changing Consumer Preferences**



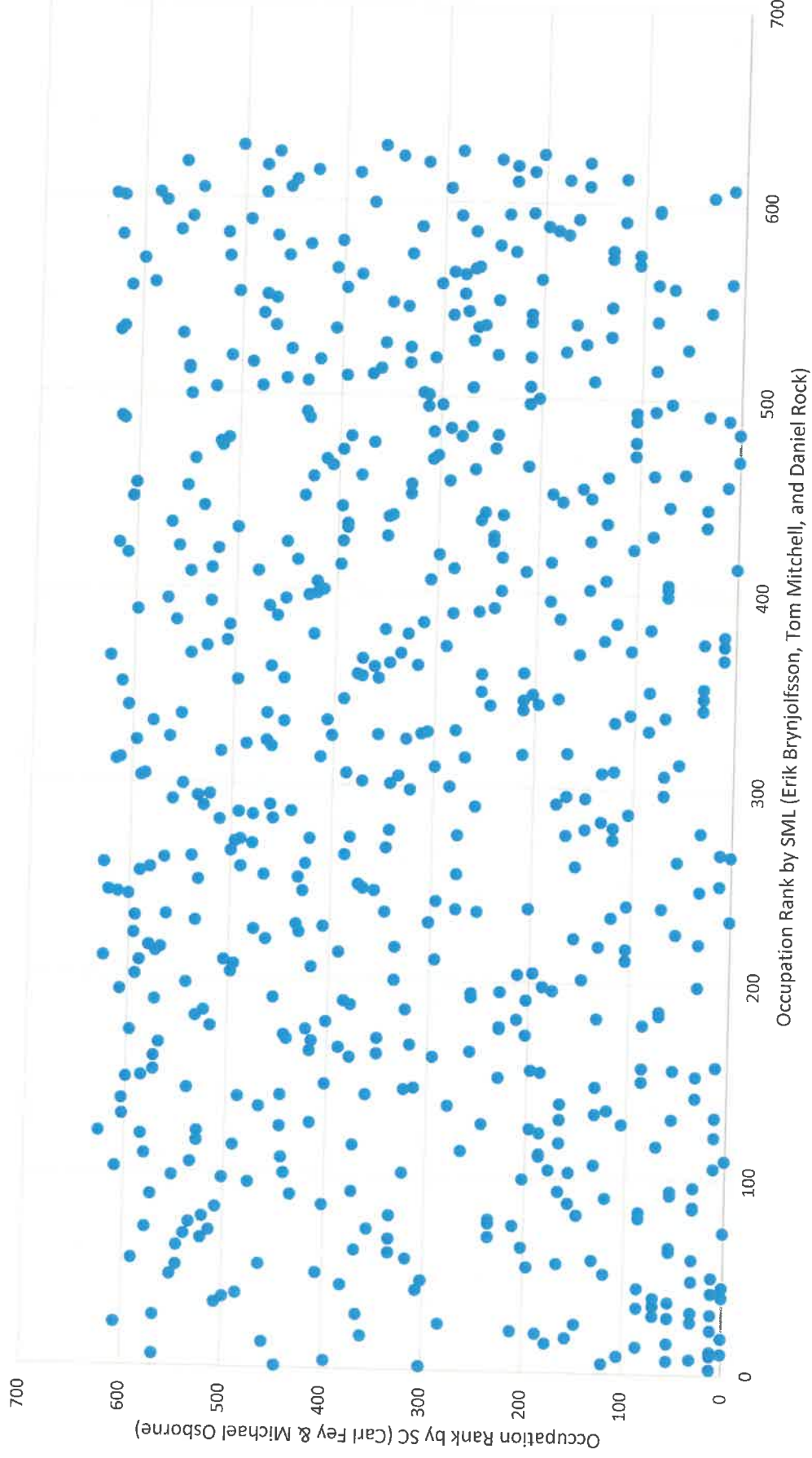
## **Future of Work**

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- **Task Automation**
- **Machine Learning / Artificial Intelligence**
- **Autonomous Vehicles**
- **Platforms for Gig Work**
- **Improved Mobile Technology**
- **Changes in Employer / Employee Relationships**
- **Demographic Shifts**
- **Changing Consumer Preferences**



# Future of Work





## Future of Work - What We Do Know

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- **Common Themes among major studies:**
  - Job elimination is most likely in very routine office or production tasks. Most of this has already occurred.
  - In the future, most jobs will be redesigned not eliminated.
  - The shift to autonomous vehicles and machine learning is happening faster than disruptions of the past, but may not happen as fast as we once thought.
    - Although there will be an inflection point that is hard to predict.
- **Thinking back to our pyramid:**
  - Face of Florida – most susceptible, shift towards more specialized service delivery
  - Protect Florida – impact to speed and quality of services
  - Inform Florida – change access to education, information and high end services
  - Transform Florida – accelerate all of these changes



## National Initiatives

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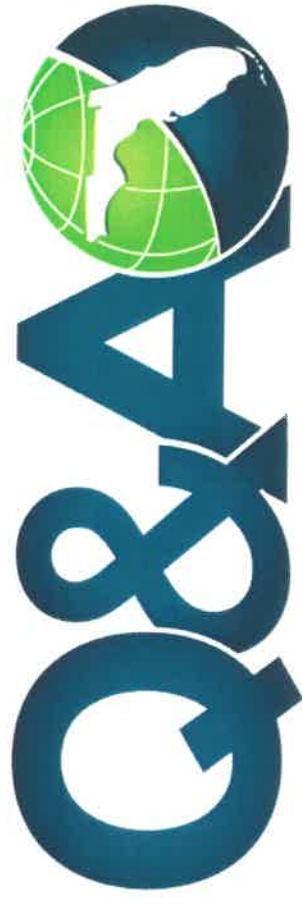
- **T3 Innovation Network:**
  - efforts to transform education and workforce data collection
- **Credential Engine:**
  - efforts to make credential descriptions transparent and consistent
- **Career One-stop Certification Finder:**
  - Links certifications to occupations and industries
- **Wage Record Sharing:**
  - Several pilots and programs exist that facilitate wage record sharing among states and the federal government.
  - Siloed efforts, limited in scope
- **Wage Record Enhancement:**
  - Improve ability to measure education and training outcomes
- **Credentials of Value Institute:**
  - Help states define links between skills, credentials, occupations and industry





## Questions?

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## Contact Information

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# Thank You.

If you have questions or comments about this presentation or need to discuss a future project, please contact us.

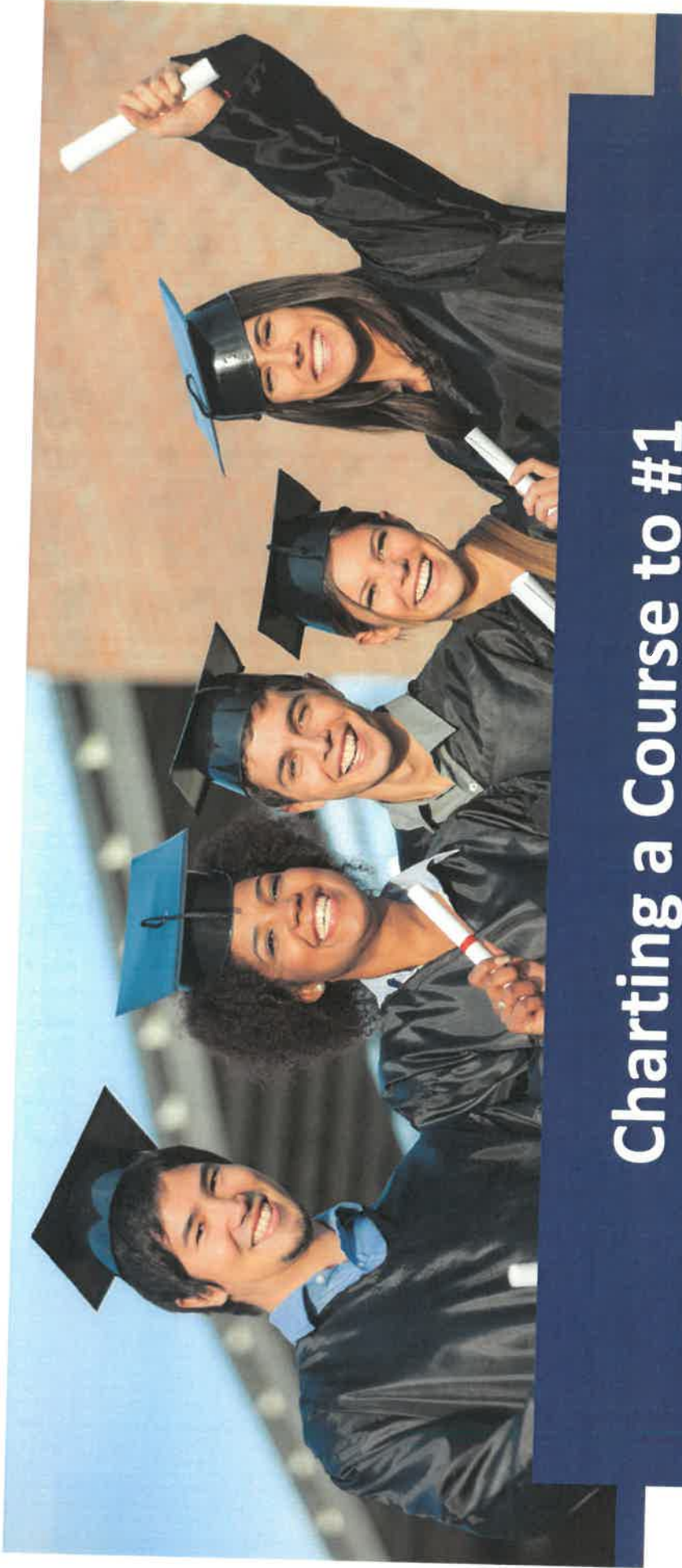
[WSER.info@deo.myflorida.com](mailto:WSER.info@deo.myflorida.com)

**Visit: [floridajobs.org/wser](http://floridajobs.org/wser)**

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DEO Bureau of Workforce Statistics and Economic Research  
Adrienne Johnston: 850-245-7257



# Charting a Course to #1

**Dr. Eric Hall, Chancellor for Innovation**  
**Dr. Carrie Henderson, Executive Vice Chancellor, Florida College System**  
**Richard E. Norman III, Ed.S., State Director of Apprenticeship**

Florida Talent Development Council - October 7, 2019



## **At-tain-ment**

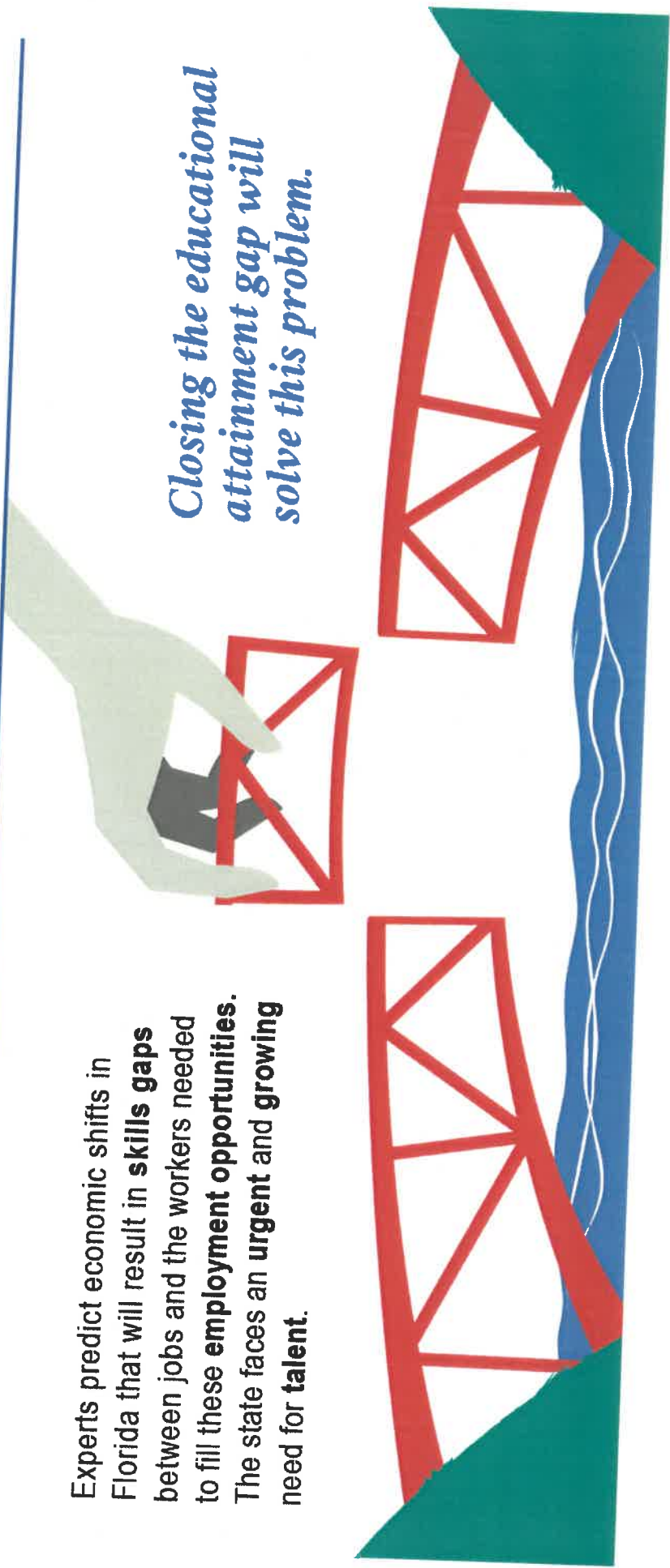
/ə- 'tān-mənt/

noun

The educational level of a state measured by the percentage of the working-age population who have earned a college credential, which includes an associate degree, bachelor's degree, or high-quality college certificate.

Experts predict economic shifts in Florida that will result in **skills gaps** between jobs and the workers needed to fill these **employment opportunities**. The state faces an **urgent** and **growing** need for **talent**.

*Closing the educational attainment gap will solve this problem.*



## Why Attainment Matters

- Higher attainment levels positively impact the individual, local community and taxpayers
- **Florida workers** experience increased job opportunities, higher earnings and enhanced skills
- **Business leaders** experience increased ability to meet future and current talent needs as well as enhanced productivity and business development
- **Taxpayers** benefit from increased civic engagement and improved economic impact

# Attainment Progress

Residents with a high-quality degree or credential

**UNITED STATES**  
**47.6%** ↑ **7.6%**  
since 2013



**FLORIDA**  
**49.3%** ↑ **10.7%**  
since 2013  
**ranks 20<sup>th</sup> among all states in the U.S.**

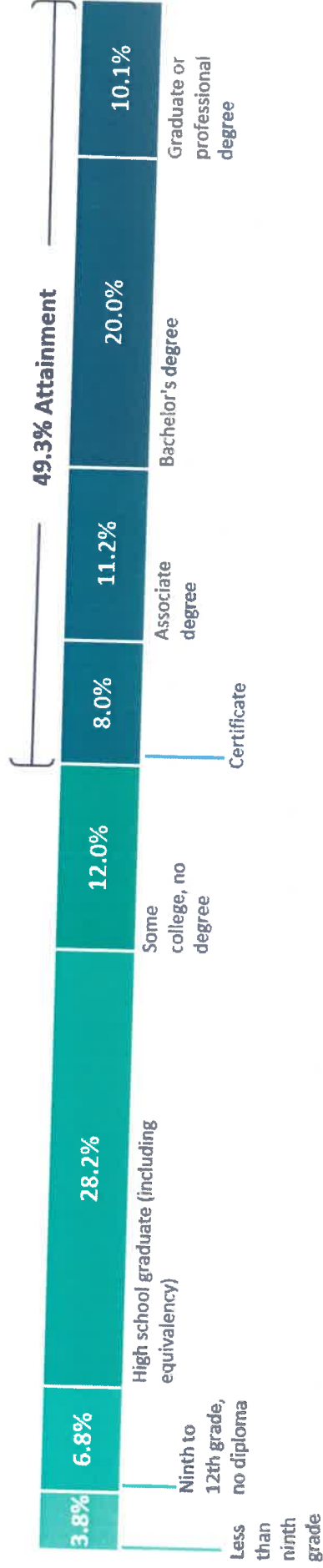


■ 2-year degree or higher

■ Includes workforce-relevant certificates

\*An estimated 8% of Florida residents and 5.2% of U.S. residents hold a workforce-relevant certificate, according to Lumina Foundation. These data are not yet available at the county level.

# Florida Attainment by Education Level



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## Rise to 55: Resourcing Industry for a Strong Economy

- Higher Education Coordinating Council (HECC) campaign to increase attainment rate of Floridians ages 25 to 64 to 55% by 2025
- Mission was to increase awareness of the need for workers to continue their education past high school
- With the generosity of Lumina Foundation and Helios Education Foundation, HECC implemented attainment grants that supported:
  - Research
  - Statewide convenings
  - Regional convenings
  - Communications tools



## **RISE to 55: Recommendations**

- **Strengthen regional partnerships with business and economic development by ensuring program alignment to workforce needs**
- **Expand incentives to promote collaboration and engagement between the business community and education system**
- **Continue to support all education sectors defining key performance metrics to align with statewide higher education policy and fiscal goals**

# **Strengthening Alignment between Industry and Learning (SAIL) to 60**

**By 2030, 60 percent of working-age  
adults in Florida will have a high-value  
postsecondary certificate, degree or  
training experience**

## **SAIL to 60**

- Increase awareness of statewide efforts related to college access, affordability and success (e.g., Florida Virtual Campus, Florida College Access Network)
- Give students credit when credit it's due
  - Systematic, cross-sector approach to awarding credit for prior learning
  - Career pathways between career centers and state colleges
  - Reverse transfer between state colleges and universities



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## Identifying Measures of Progress Toward Attainment Goals

## **How many Floridians need to have a credential for Florida to meet its attainment goal of 60 percent by 2030?**

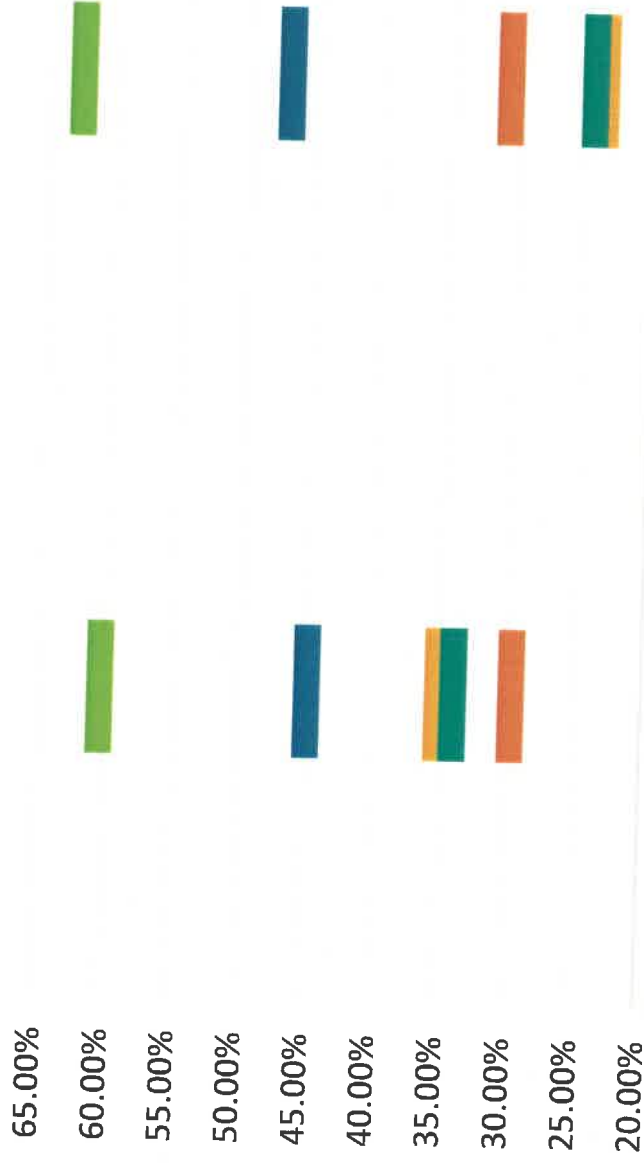
- To answer that question, we first need to understand the pipeline (e.g., number of students graduating high school, in-migration)
- We also need to understand the current supply—the certificates and degrees being awarded by public and private postsecondary institutions

With that information, the question becomes:

*How many **additional** graduates are needed to meet the attainment goal? In other words, what is the difference between the identified goal (60 percent) and the projected number of credentials that will be offered by postsecondary institutions?*

We also need to be mindful of closing equity gaps for underserved populations and incumbent workers

# Attainment by Race/Ethnicity (Ages 25-64)



	Florida	National Average
White	44.9%	47.1%
Black	29.7%	30.8%
Hispanic	35.1%	23.7%
Asian	60.3%	62.7%
Native American	34.0%	24.5%



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It isn't just about attainment.

It's about attainment of **credentials**  
of **value**.





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## Ensuring Program Offerings Align with High-Demand Employment Needs

# Workforce Education System – Pathway to a Career



## CTE Definitions

- **Industry Certification** – a time-limited credential issued by an independent, 3rd party certifying entity
- **Career Certificate** – signifies a student has successfully completed a (clock hour) postsecondary career education program and is ready for employment in a field that requires non-college credit postsecondary training
- **Apprenticeship Certificate of Completion** – signifies a registered apprentice has successfully completed the technical and academic standards of a registered apprenticeship program

## **Deep Dive: Apprenticeships**

- National Structure of Apprenticeship
- Purpose of Apprenticeship
- Components of Registered Apprenticeship
- Purpose of Preapprenticeship
- Updates
  - Legislative
  - Educational
  - Program
  - Funding

## National Structure of Apprenticeship

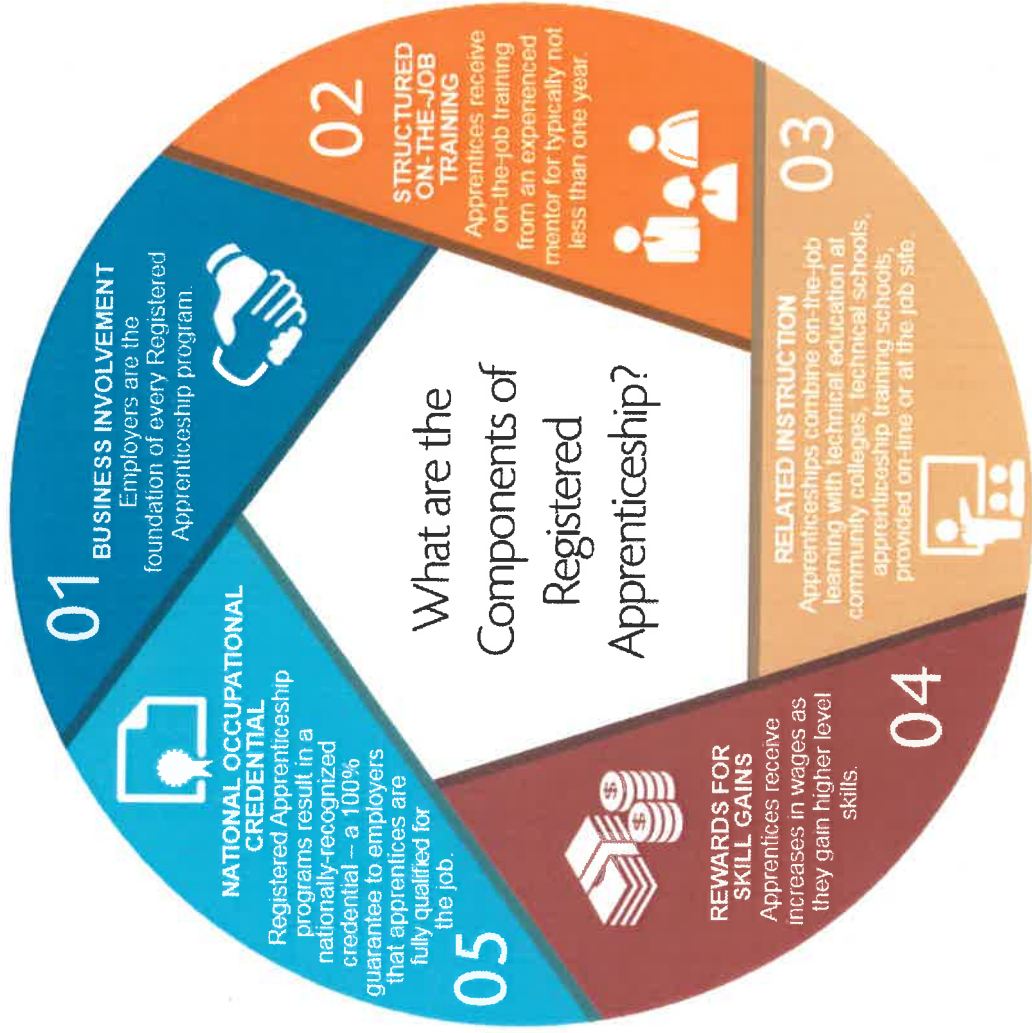
- **Office of Apprenticeship (OA States) – State** apprenticeship programs are run and managed by the USDOL. (ex. Georgia, South Carolina, Indiana)
- **State Apprenticeship Agency (SAA States) – An agency** of a State government that has responsibility and accountability for apprenticeship within the State recognized by the USDOL to register and oversee apprenticeship programs and agreements for Federal purposes. (ex. **Florida**, Washington, Kentucky)

---

# What is the Purpose of Apprenticeship?

- To enable **employers** to develop and apply industry recognized standards to training programs with the intention of:
  - increasing productivity;
  - improving quality of the workforce;
  - retaining company knowledge; and
  - reducing turnover.
- **REMEMBER:** Registered Apprenticeship is an **employer-driven** process, not education or government.

# Components of Registered Apprenticeship



## 01 - Business Involvement - Sponsorship

- Sponsors are responsible for the administration of all aspects of a Registered Apprenticeship program.
- **Who can sponsor:**
  - a single employer,
  - a trade association,
  - a group of employers,
  - local workforce board,
  - an educational institution,
  - community or faith-based organization,
  - or other approved entity may choose to sponsor.



## 02 – Structured On-The-Job Training

- \*\* The length of an apprenticeship program varies from one to five years depending on the occupation training requirements. Irrespective of the training model, all apprenticeship programs **MUST** be no less than 2,000 hours of OJT
- **Time-Based:** Apprentices complete a required number of hours in on-the-job training.
  - **Competency-Based:** Apprentices progress at their own pace – they demonstrate competency in skills and knowledge through proficiency assessments.

## 02 – Structured On-The-Job Training

- **Hybrid-Based:** Using minimum and maximum range of hours, and the successful demonstration of identified and measured competencies.
- **\*\*Career Lattice:** The use of an interim credential to validate progression of an apprentice through a registered apprenticeship program within competency or hybrid based models **ONLY**. (industry certification, career certificate, company certificate)

## 03 – Related Instruction

- **Related Technical Instruction (RTI)** – An organized and systematic form of instruction designed to provide the apprentice with knowledge of the theoretical subjects related to a specific trade or occupation. (Minimum of 144 hours per year recommended)
  - It can be spread out over the course of the apprenticeship, front-loaded, segmented, or articulated (prior experience credit).
  - It can be delivered by an educational institution, in-house, on-line, corresponded, or any combination.
  - Apprentices can be enrolled in either Clock Hour or Credit Hour courses, when appropriate.

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## What is the Purpose of Preapprenticeship?

- To prepare an individual, 16 years of age or older, to become an apprentice.
- Preapprenticeship programs **MUST** be sponsored by one or more Florida Registered Apprenticeship programs, and **MUST** be in the same apprenticeable occupation(s).
- Preapprenticeship programs run between 6 months and 2 years, depending on the training. (OJT is not required)
- Preapprentices receive the same consideration as Veterans in the selection process.

## Legislative Updates

- **HB7071**
  - Annual report on apprenticeship and preapprenticeship.
  - Providing assistance to stakeholders in notifying students, parents, and the community of the availability of apprenticeship and preapprenticeship opportunities.
  - Removal of the restriction of apprenticeable occupations in the fields of sales, retail, management and distribution, as well as professional and scientific occupations.
  - Dedicated state funds for new and expanded apprenticeship opportunities (\$10 million in the GAA)

## Educational Updates

- **Clock Hour – Credit Hour**
  - National Association of State and Territorial Apprenticeship Directors (NASTAD) – recognized the US Department of Education Credit Hour to Clock Hour conversion chart.
    - Allows for the use of Credit Hour courses in lieu of Clock Hour courses.
- **Florida DOE – Under-graduate level courses**
  - Department lifted the restriction that apprentices had to only be enrolled in “less-than-college” level courses. Apprentices can now be enrolled in under-graduate level courses.

## Program Updates

- Continuous Improvement – Kaizen
  - Revising paperwork flow processes has reduced turnaround times to customer, and reduced the average time to register new programs down to 10 – 20 days from 7 – 12 months.
- New travel policy has reduced response times to customers and reduced paperwork for ATR's.
- Implemented GoToMeeting to allow for remote conferencing.

## Funding Updates

- Apprenticeship and Preapprenticeship Expansion Grants
  - \$10 Million – HB7071
    - Round 1 - \$7 Million
      - Applications Due September 30, 2019
      - Over 100 intentions to apply
    - Round 2 - \$3 Million
      - Intent to Apply – Date to be determined
  - \$3 Million – Federal ASE Grant (3 Years)
    - 68% to programs and apprentices
    - 32% to capacity building



## CTE Definitions (continued)

- **Associate in Science/Associate in Applied Science Degree** – prepares students for occupations that require a two-year technical degree
- **College Credit Certificate** – prepares students for entry into employment in a field that requires some college credit but less than a degree and signifies a student has successfully completed part of an A.S. degree
- **Bachelor's degree (workforce baccalaureate)** – prepares students for occupations that require a four-year degree

## Current Program Approval Process

### Certificate & Associate

- FDOE develops and maintains career & technical education (CTE) programs that align with 17 career clusters
- Programs are detailed in curriculum frameworks developed with education, business and industry, and trade associations
- Once SBOE\* approves a program, it may be offered by any institution in Florida

### Baccalaureate

- State colleges may seek approval from SBOE to offer baccalaureate degrees in limited, high-demand workforce areas
- The process established in section 1007.33, Florida Statutes, requires colleges to partner with business/industry to show demand and demonstrate unmet need through data

## Measuring Program Quantity

Postsecondary Award Type	# of Programs
Career Certificate	298
Apprenticeship Certificate	56
Associate in Science/Applied Science	172
College Credit Certificates	250
Baccalaureate Degrees	63
<b>Total</b>	<b>839</b>



# Moving Beyond Quantity: Measuring Program Quality

## **Executive Order 19-31**

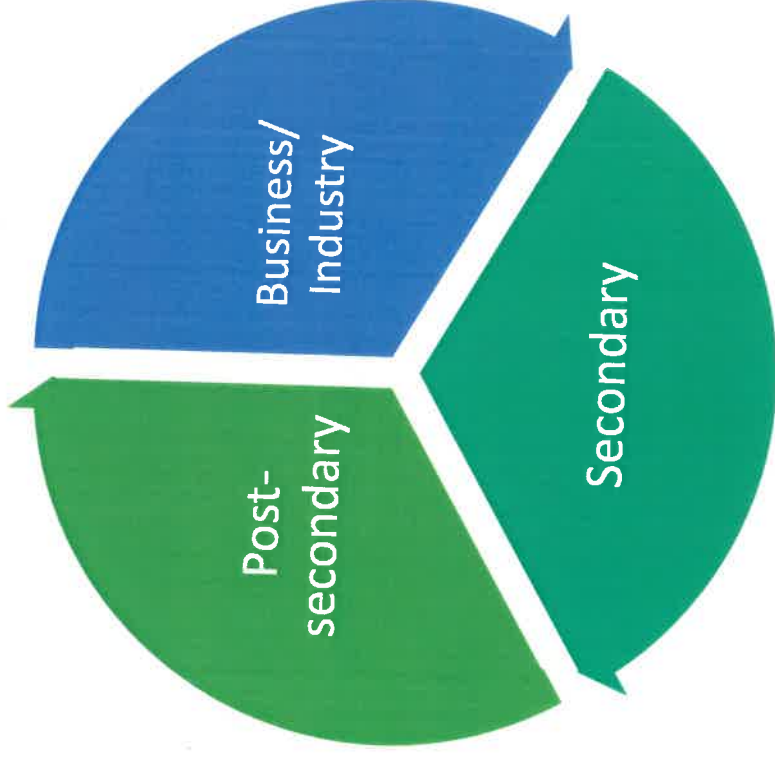
- **Audit course offerings in state CTE system on annual basis**
- **Utilize expertise of stakeholders to ensure CTE course offerings are aligned with market demands**
- **Develop CTE best practices for partnerships between high schools, postsecondary institutions and businesses**
- **Recommend to the Governor annually which course offerings to eliminate, create and strengthen**

## **CTE Audit: Review of Programs**

- **Goal**
  - Ensure all active, approved CTE programs have high demands, high skills and/or lead to occupations with middle- to high-level wages
- **Phases (Staggered roll out)**
  - **Phase 1: Statewide review of programs**
  - **Phase 2: Local program review**
  - **Phase 3: Share information and best practices**

## Stakeholder Engagement

- Statewide advisory committee (17 members)
  - CareerSource, DEO, Enterprise Florida, Council of 100, Board of Governors, district and college leaders, business & industry
- Three expert groups (47 experts)
  - Public feedback via website



Expert Groups for CTE Audit

## **Postsecondary Statewide Review: Workforce Program Quality Indicators**

- Indicator of whether the program trains for an occupation on the Statewide Demand Occupation List
- Indicator of whether the program trains for an occupation on the Regional Statewide Demand Occupation Lists
- Indicator of whether the final program SOC in the framework is linked to an occupation that is expected to grow over the next eight years
- Indicator of whether the program trains for an occupation with middle to high wages



## **Postsecondary Statewide Review: Institutional Program Quality Indicators**

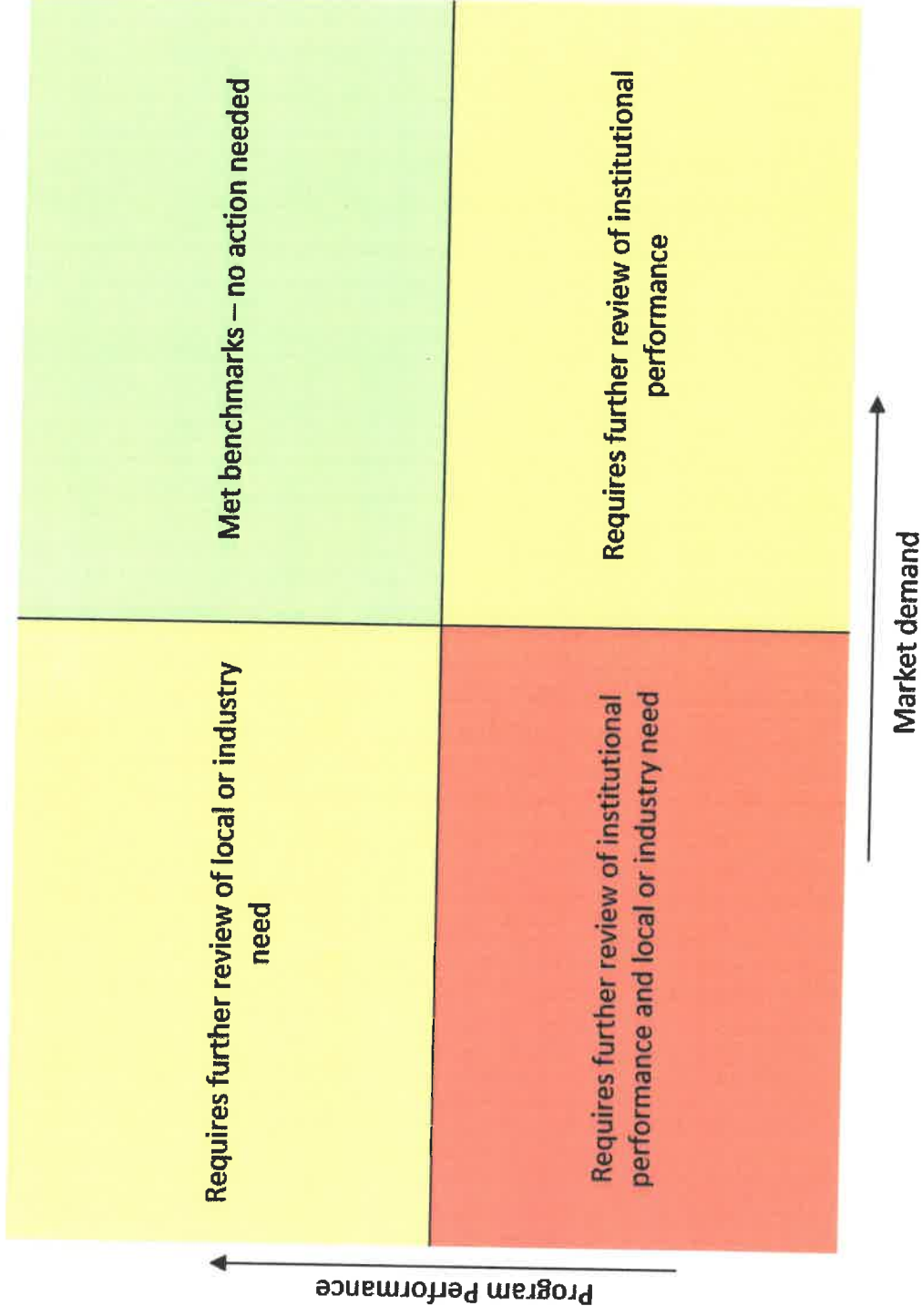
- Retention rate
- Student success rate (defined as the percent of students exiting the program with a degree, certificate or related industry certification)
- Job placement or continuing education rate
- Average wages for those found employed in Florida after completion

## Postsecondary Statewide Review: Future Program Quality Indicators

- Pass rate for licensure exams
- Number of industry certifications earned in the program
- Return on investment



# Plotting Performance



## Phase 2: Collecting Data for Local Review

- Requires further review of institutional performance
  - Disaggregate the program level data by institution to analyze institutional performance
  - Collect supplemental data from institutions that might not be available at the state level
- Requires further review of local or industry need
  - Collect data from employers, industry, community partners
  - Collect supplemental data from institutions



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## Q&A



[www.FLDOE.org](http://www.FLDOE.org)



[www.FLDOE.org](http://www.FLDOE.org)



# State University System of Florida Overview

**Marshall M. Criser III, Chancellor**

**October 7, 2019**

**[www.flbog.edu](http://www.flbog.edu)**

**BEST  
STATE**

**U.S. News  
& WORLD REPORT  
Higher Education  
2017-2019**

# Florida is #1 in the Nation for Higher Education



**U.S. News & World Report  
2017, 2018, 2019**



# State University System Overview



\_\_\_\_\_ **12** institutions

\_\_\_\_\_ **Focus on bachelor's, master's, and doctoral programs**

\_\_\_\_\_ **400,000+** students



\_\_\_\_\_ **1,700+** academic degree programs

\_\_\_\_\_ **91,000+** degrees awarded

\_\_\_\_\_ **#1** producer of utility patents in Florida

# Improved Student Success



10% increase in 4-year  
graduation rates over  
the last 5 years

**51%**

4-year  
graduation rate  
2014-18

Goal  
Trends



**6% pts**  
projected  
next 4 years



Increase in student  
retention

**86%**

% of FTIC full-time students  
who enrolled during their  
second fall term 2017-18

Goal  
Trends

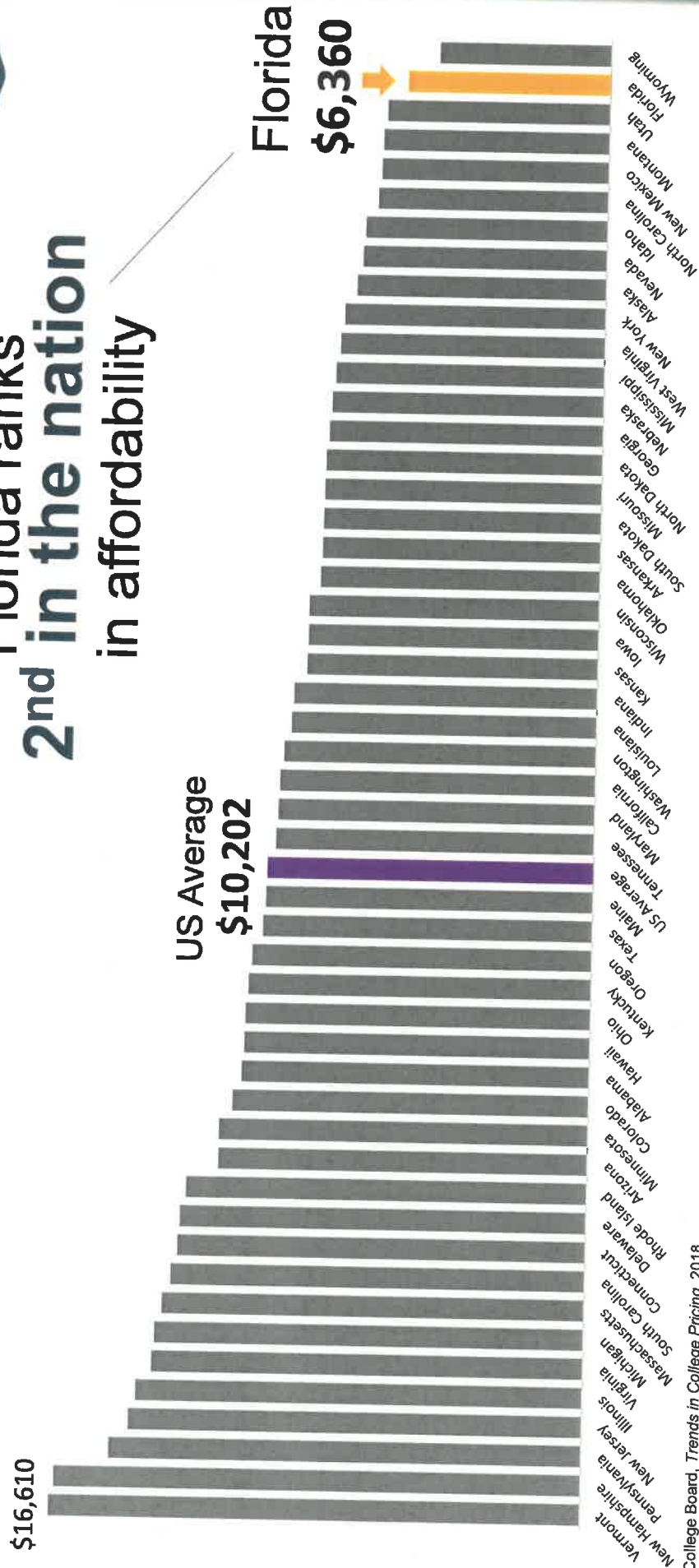


**5% pts**  
projected  
next 5 years

# College Affordability



Florida ranks  
**2nd in the nation**  
in affordability

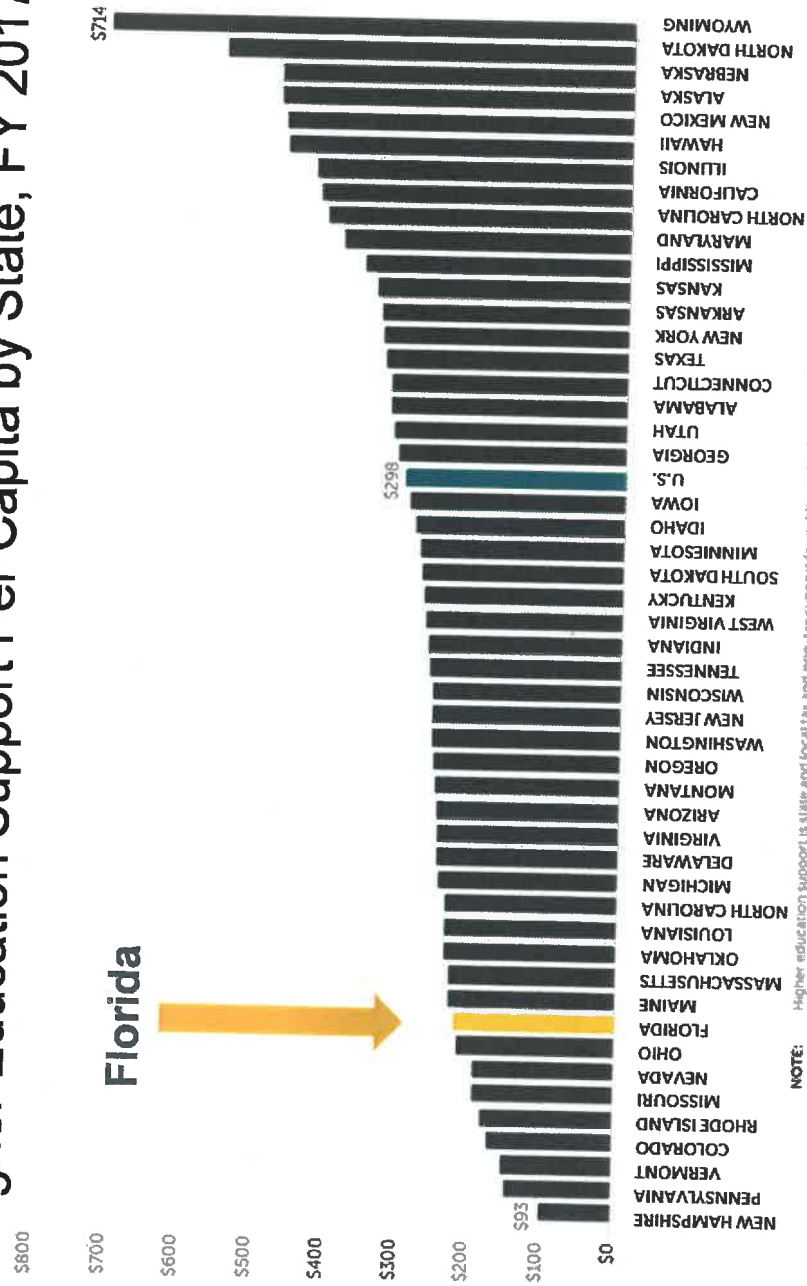


Source: College Board, Trends in College Pricing, 2018  
Data weighted by full-time enrollment

# State Support



## Higher Education Support Per Capita by State, FY 2017



**NOTE:** Higher education support is state and local tax and non-tax support for public and independent higher education, including special purpose appropriations for research-agricultural-medical

**SOURCES:** State Higher Education Executive Officers Association, with data from the U.S. Census Bureau

# Initiatives



**System  
Accountability  
&  
Metrics**

**Connecting  
Students to  
the  
Workforce**

**Partnerships  
with  
Businesses  
& Industry**

# Aligning Degrees with Workforce Needs



## Programs of Strategic Emphasis

used to align SUS degrees with Florida's economic & workforce needs



**Education**



**Healthcare**



**Global**



**STEM**



**Florida Needs**

# Meeting Workforce Demand



- **67,000** bachelor's degrees awarded in 2017-18;  
52% in Programs of Strategic Emphasis
- **24,000** graduate degrees awarded in 2017-18;  
64% in Programs of Strategic Emphasis
- 1,000 for-credit certificate programs offered to meet workforce needs; **more than half** in Programs of Strategic Emphasis
- In 2018-19 **more than 5,000** for-credit certificates were awarded

# Strategic Plan Update



## 2019 Revision to 2025 System Strategic Plan



Degree production goals to reflect other sectors & workforce demand



Graduation rate goals & new metrics for targeted student populations



Employment & wage metrics



# Commission on Access and Attainment



Created in 2012  
to address  
Florida's need for  
future baccalaureate  
degree attainment  
& workforce  
alignment

Included:  
Board of Governors  
State Board of Education  
Legislative Staff  
DEO  
Business representative  
Florida Council of 100

## Recommendations

- ✓ Gap analysis & plan for investing funds in high-demand areas
- ✓ Increase partnerships across higher education



[www.flbog.edu](http://www.flbog.edu)

# FLORIDA

COLLEGE ACCESS NETWORK



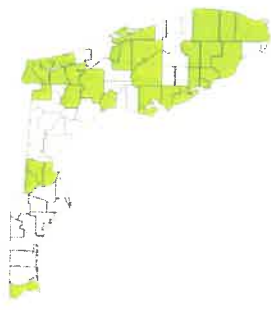
Florida College  
Access Network is  
the heart of a  
movement to ensure  
**today's students**  
are prepared for  
**tomorrow's jobs.**

**Our mission:** To create and  
strengthen a statewide network  
that catalyzes and supports  
communities to improve college  
and career readiness, access, and  
completion for all students

# FCAN's Work



**Research and Data** FCAN publishes research and data on evidence-based practices and policy opportunities to strengthen Florida's talent pool. Recent publications highlighted student experiences with financial aid, transfer policies, and developmental education reform.



**Local college access networks (LCANs)** LCANs represent 82% of the state's population. These public and private partnerships are made up of cross-sector community leaders who work together to solve community-specific issues addressing talent development.



**Statewide Initiatives** FCAN coordinates four College Ready Florida initiatives to increase access to resources to support students in continuing their education after high school.



A high school diploma alone is **no longer** the ticket to the middle class.

**50%** Recent high school graduates with jobs after high school

- Median annual earnings: **\$12,000**

**28%** Working-age Floridians with only high school diploma

- Median annual earnings: **\$27,522**

**12%** Working-age Floridians with some college, but no degree

- That is **1.3 million** residents

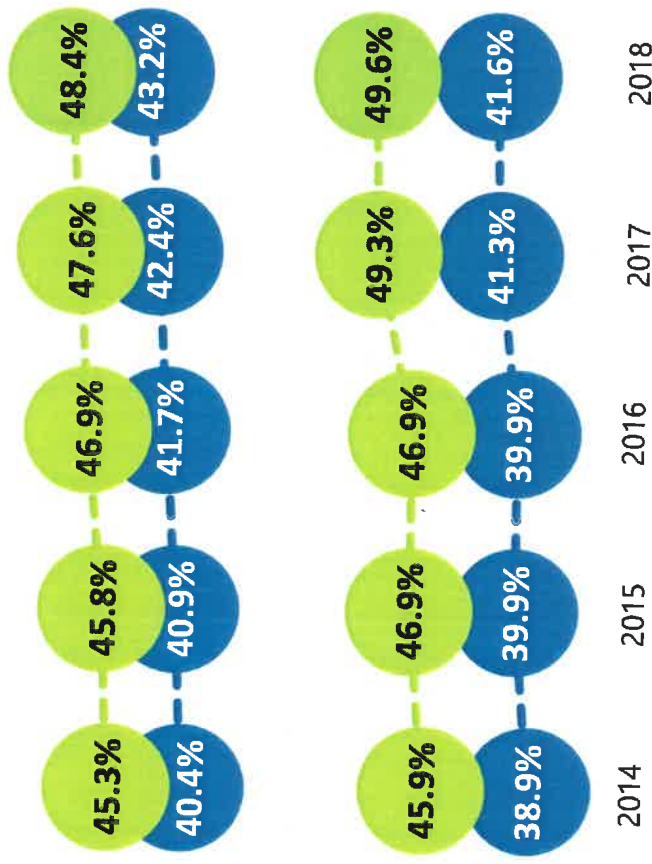


# Working-Age Adults (Age 25-64) with a High-Quality Degree or Credential

**UNITED STATES**  
**48.4%** ↑ 3.1% since 2014

**FLORIDA**  
**49.6%** ↑ 3.7% since 2014

ranks 22<sup>nd</sup> among all states in the U.S.



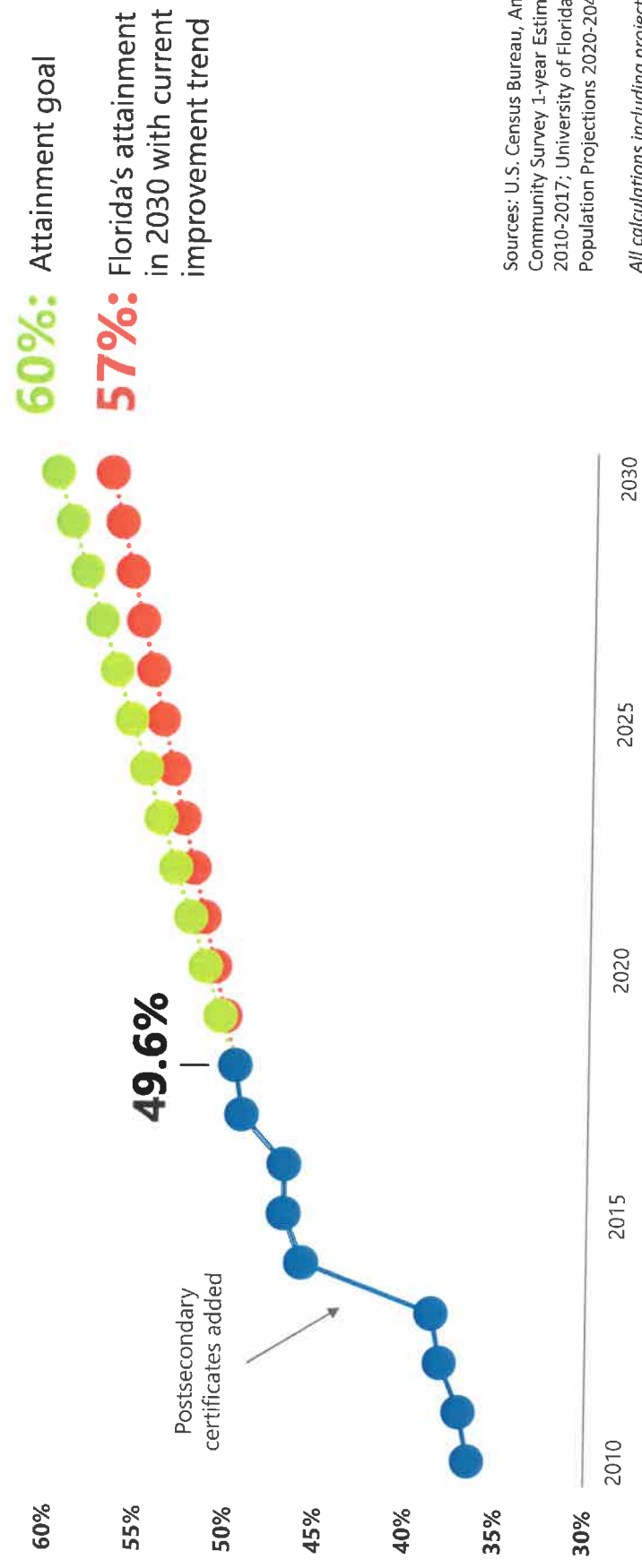
■ 2-year degree or higher ■ Includes workforce-relevant certificates

\*An estimated 8% of Florida residents and 5.2% of U.S. residents hold a workforce-relevant certificate, according to Lumina Foundation. These data are not yet available at the county level.

Source: U.S. Census Bureau, American Community Survey 1-year estimate and Lumina Foundation Stronger Nation Report



# At our current rate, Florida will fall short of the talent needs our economy demands.



Sources: U.S. Census Bureau, American Community Survey 1-year Estimates, 2010-2017; University of Florida, BEBR, Population Projections 2020-2045

All calculations including projections completed by FCAN.



To grow an educated workforce for the future, Florida must meet the needs of **today's students:**

**53%** come from low or moderate income households

**43%** attend school part-time

**37%** are age 25 or older

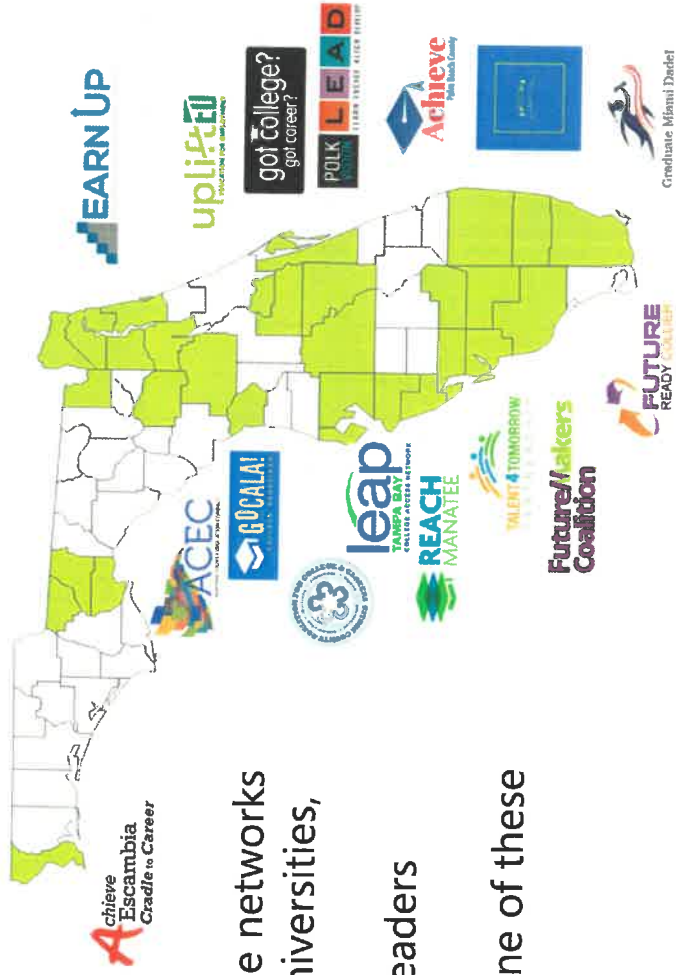
**83%** of full time, first time in college students receive federal, state, and/or institutional financial aid.



*Source: Integrated Postsecondary Education Data System (IPEDS)*

Local College Access Networks are **cross-sector partnerships** that **create solutions** to support local **talent development**.

- 17** regional networks throughout Florida
- 600** organizations and institutions within these networks including school districts, colleges and universities, career and technical colleges, nonprofits, philanthropy, business and government leaders
- 82%** of Florida's population is supported by one of these coalitions



Through **FutureMakers Coalition**, Lee Health, CareerSource Southwest Florida, Southwest Florida Community Foundation, and local technical colleges solved a critical workforce shortage.



In 18 months, the coalition supported **60 unemployed and underemployed residents** to earn their CNA credentials and get full time jobs with benefits at Lee Health.

For information and resources,  
contact:

Laurie Meggesin, Executive Director  
[lmeggesin@floridacollegeaccess.org](mailto:lmeggesin@floridacollegeaccess.org)  
831-974-3897

## Visit our Website

Read our latest policy briefs, view recent webinars, and sign up for email updates.

[www.FloridaCollegeAccess.org](http://www.FloridaCollegeAccess.org)



@FLCollegeAccess

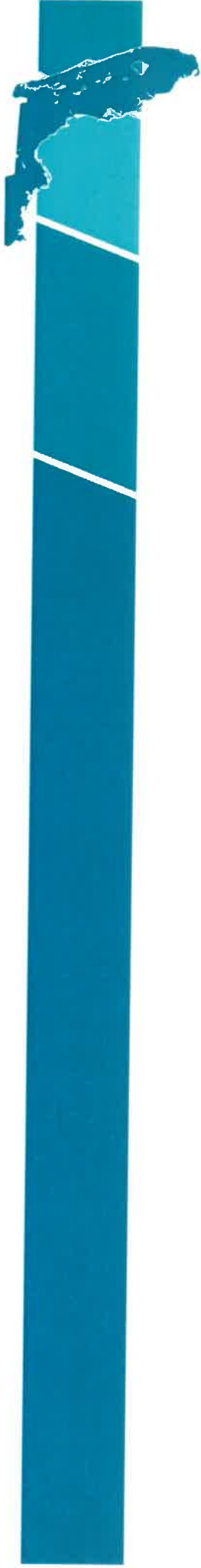


Facebook.com/FloridaCollegeAccessNetwork



LinkedIn.com/company/Florida-College-Access-Network





# Charting Florida's Future

**Talent Development Council Meeting  
October 7, 2019**

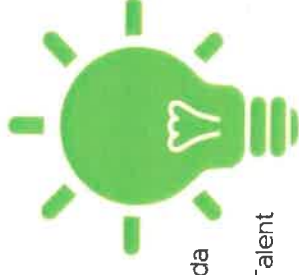
**Nicole Washington  
Principal, Washington Education Strategies  
Florida Policy Consultant, Lumina Foundation**

# Talent is an Economic Driver



**“Florida’s economy will need a skilled labor force for opportunities in health services, education, transportation, trade utilities and computing as well as jobs that require an industry certification or license. Enhancing Florida’s workforce education will provide more economic opportunities for our graduates and support further diversification of Florida’s economy.”**

Governor DeSantis, Executive Order 19-31 Charting a Course for Florida to become number 1 in the nation in Workforce Education by 2030 and ensuring Florida’s students are prepared for the jobs of the future



GOAL: Florida

**#1** in Talent



CURRENTLY:

Florida ranked

**#20** in the nation

postsecondary attainment

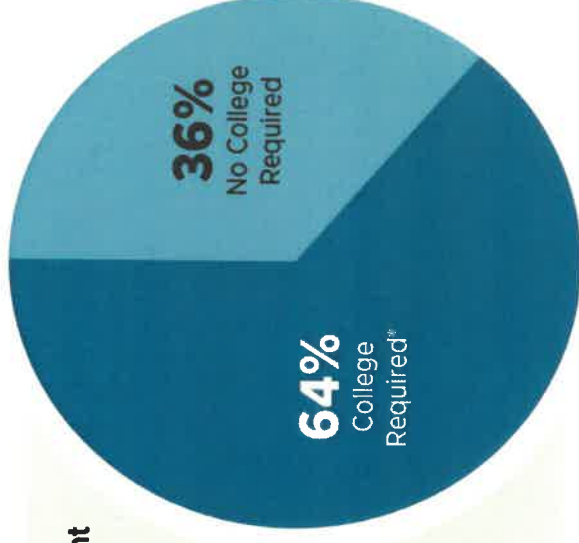
(Lumina Stronger Nation Report)

# Focusing on Florida's Talent



- As Florida sets a goal to be a national leader in talent, an intentional focus on aligning skills and credentials to workforce demand and addressing critical gaps is needed.
- More than 90 percent of the jobs recovered post-Recession have gone to college-educated individuals.
- By 2022, there will be a shortfall of 3.4 million skilled technical workers.

**Nationally, 64 percent of jobs will require education beyond high school**, which represents 1,000,000+ additional credentials in Florida. Additionally, the state will add six million more residents and need to create 1.7 million net new jobs by 2030, according to Florida Chamber Foundation.



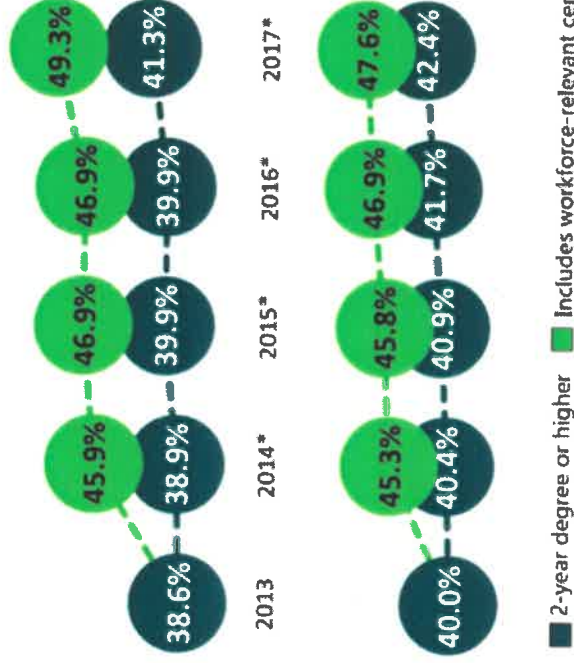
# Talent Metric: Attainment



## Working-Age Adults (Age 25-64) with a High-Quality Degree or Credential

**FLORIDA**  
**49.3%** ↑ since 2013  
 ranks 20<sup>th</sup> among all states in the U.S.

**UNITED STATES**  
**47.6%** ↑ since 2013

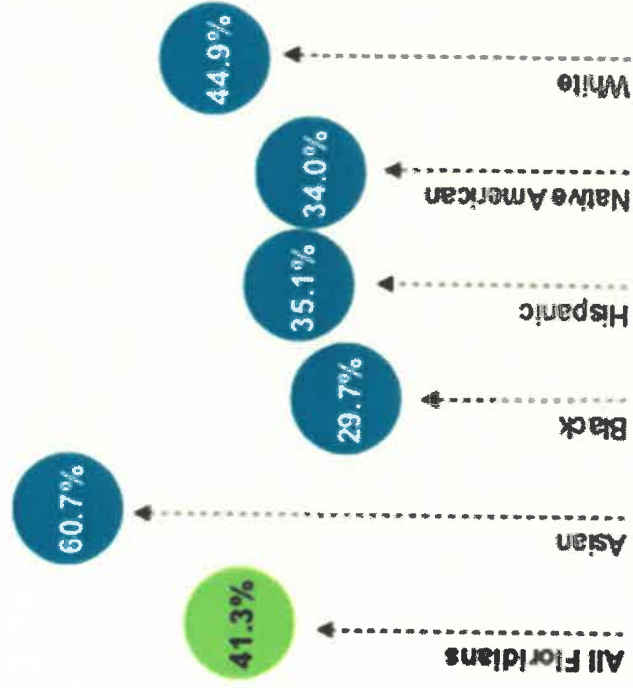
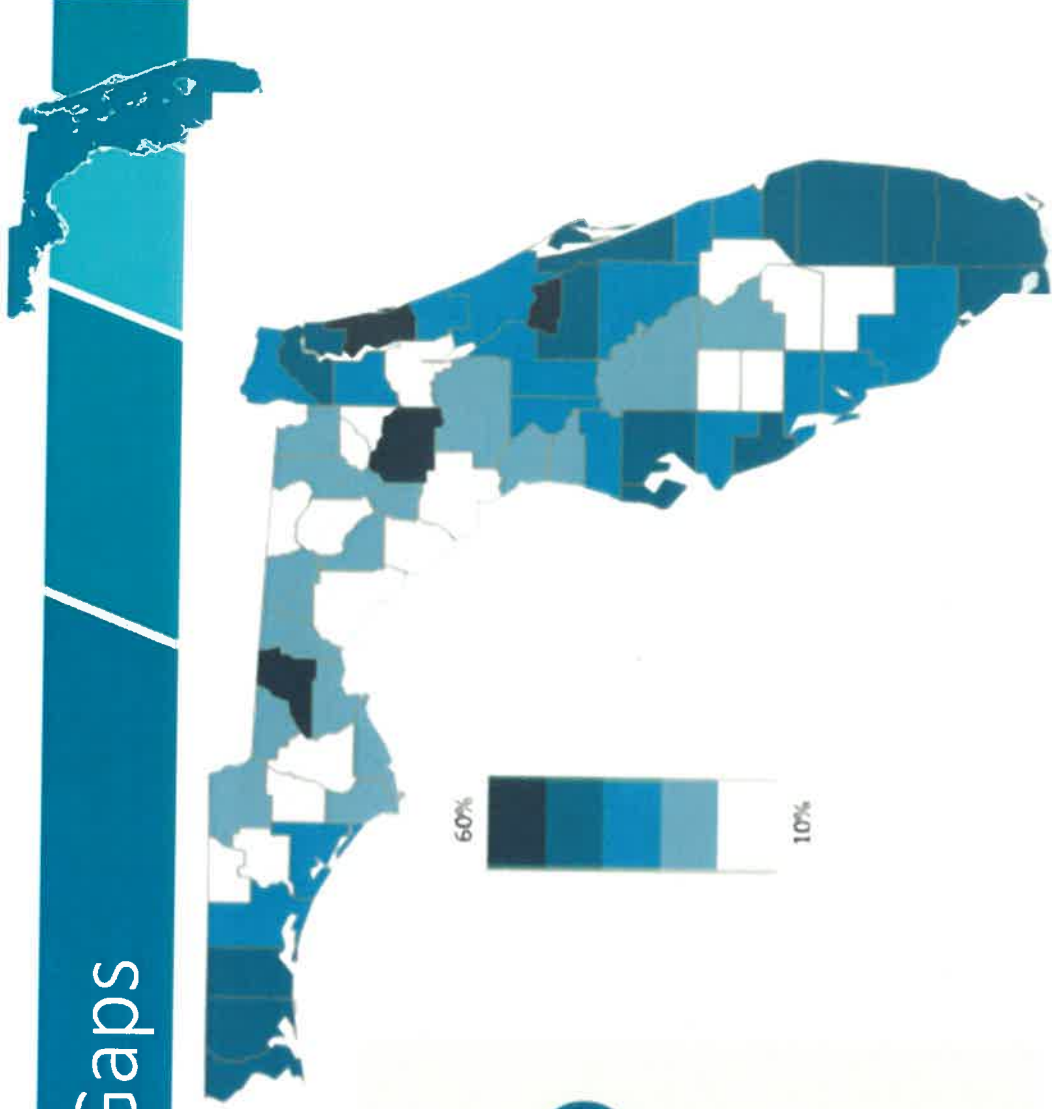


\*An estimated 8% of Florida residents and 5.2% of U.S. residents hold a workforce-relevant certificate, according to Lumina Foundation. These data are not yet available at the county level.

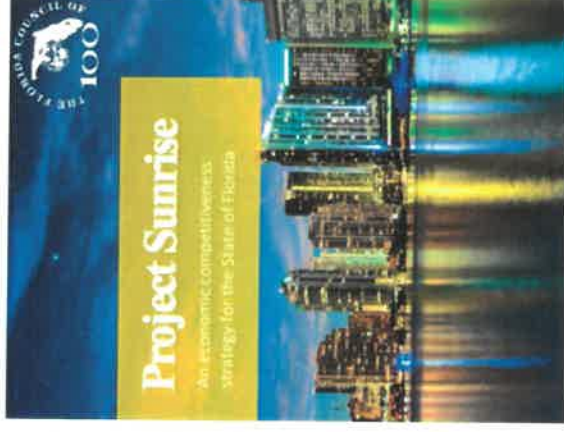
Source: U.S. Census Bureau, American Community Survey 1 year estimate and Lumina Foundation Stronger Nation Report



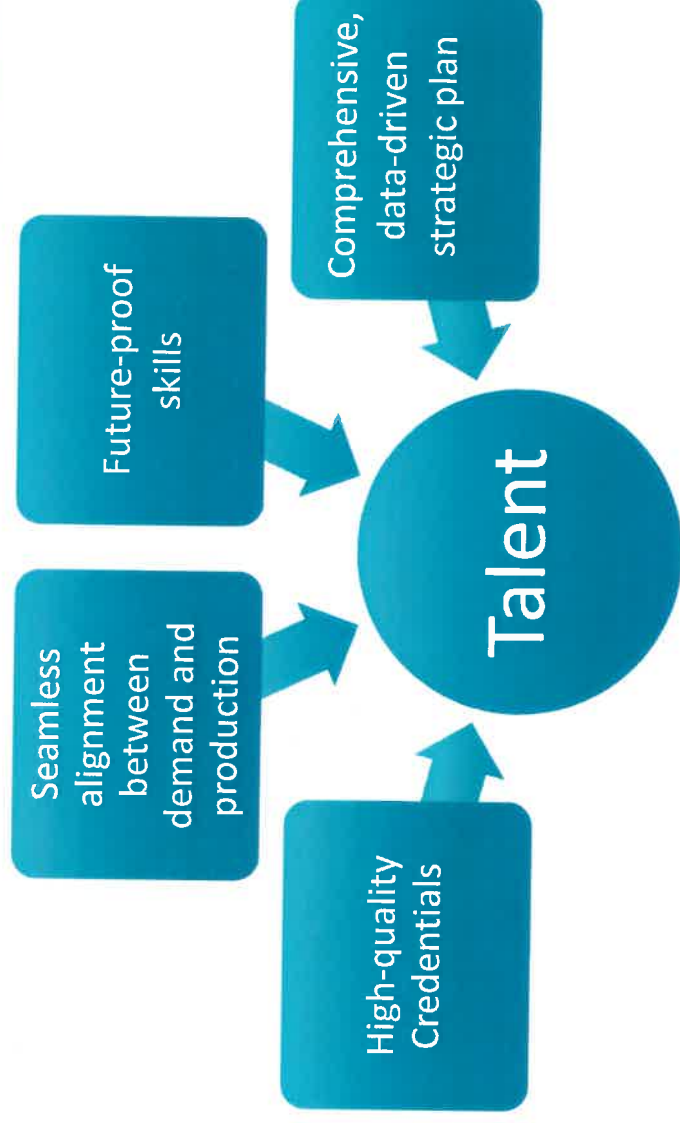
# Addressing the Gaps



# Focusing on Florida's Talent



# Talent Management Strategy



A talent management strategy is a system that promotes a high-performing workforce, identifies and closes skills gaps, and implements and maintains programs to attract, acquire, develop, promote, and retain quality and diverse talent.

# Measuring progress



The Department of Education, Department of Economic Opportunity and Florida College Access Network currently track several key progress indicators to show progress towards Florida becoming number 1 in workforce education.

Florida's top  
high-demand and  
high-wage jobs

Production of  
degrees and  
credentials by  
award type

Educational  
attainment rate  
by race, ethnicity,  
gender

Educational  
attainment rates  
by county

Employment  
and labor  
participation  
rates

Florida's  
educational  
attainment rates

Educational  
attainment rates by  
top 10 states

Postsecondary  
continuation rates  
and enrollment  
by age, gender,  
race/ethnicity

Earnings data  
by credential level

Median  
household  
income

# Strategic Approach to Talent Management



<b>COLLABORATE</b>	Leverage cross-sector collaboration that promotes talent conditions for optimal economic development and job growth success	Think Florida
<b>ALIGN</b>	Create seamless pathways aligning K-12 standards, college and career	Metamajors & Sector Strategies
<b>DATA-DRIVEN</b>	Close educational attainment gaps by focusing on targeted populations	Economic Security Report

# Attainment: Why It Matters



Higher attainment levels positively impact the individual, the local community and the state of Florida.



## **FLORIDA'S WORKERS:**

Increased job opportunity,  
higher earnings, decreased  
likelihood of unemployment  
over a lifetime,  
enhanced skills



## **LOCAL BUSINESS LEADERS:**

Increased ability to meet  
current and future talent  
needs, enhanced worker  
productivity, business  
development and growth,  
economic development



## **TAXPAYERS:**

Increased civic engagement,  
improved economic impact,  
decrease in population  
needing public assistance



## **PROSPERITY:**

Increased pathways  
to prosperity through  
innovation, a globally  
competitive workforce and  
job growth in a knowledge  
economy



# Improving Florida's Talent Pipeline for a Better Workforce

Mark Wilson, President, Florida Chamber of Commerce



## Why Improving Florida's Talent Pipeline Matters





# Florida should align Policy and Systems to Workforce Needs



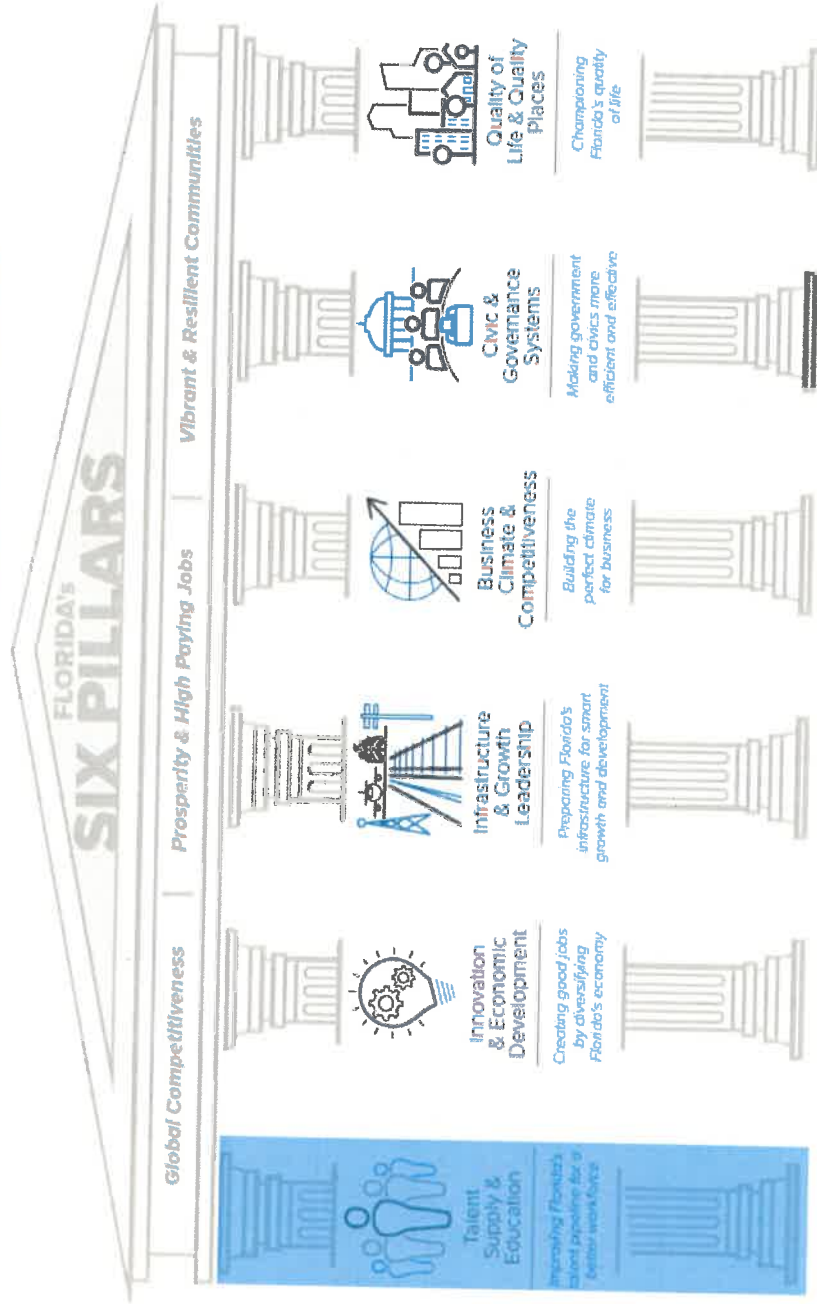
FLORIDA  
CHAMBER  
of Commerce



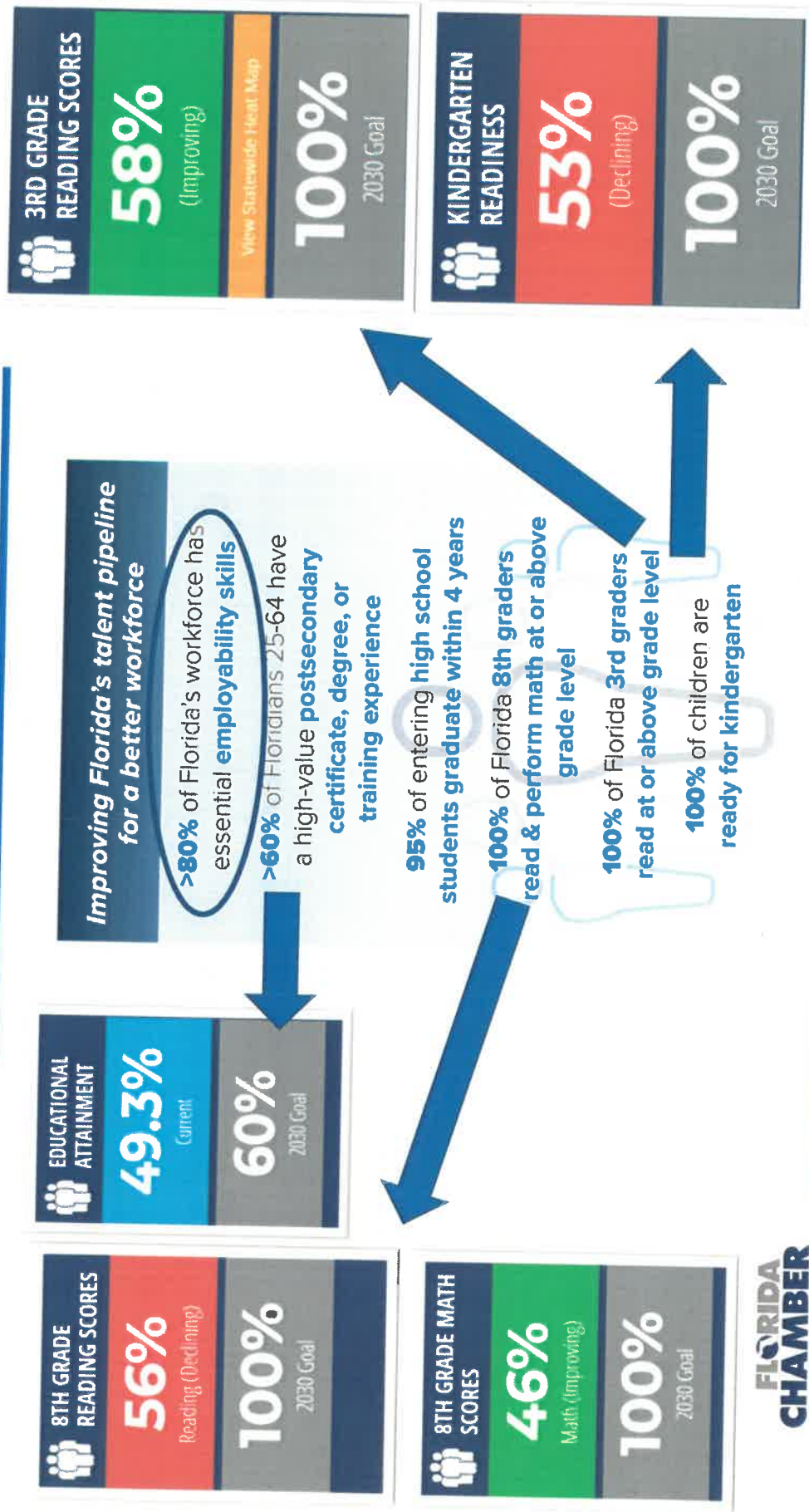
Dr. Ed Moore  
Universities



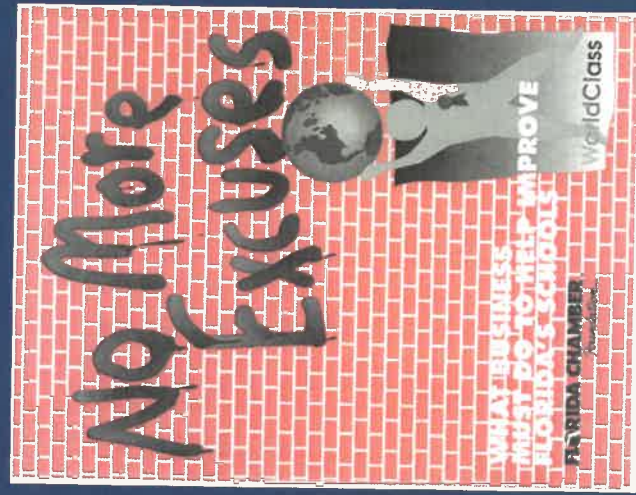
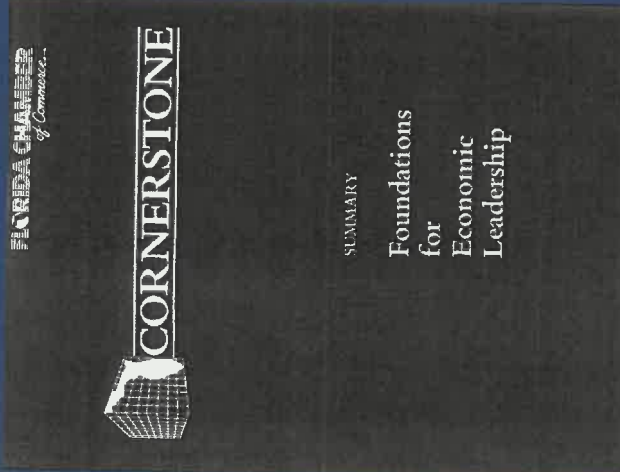
# The Florida 2030 Blueprint



# TheFloridaScorecard.org; Talent Matters



# Unifying Business for Good

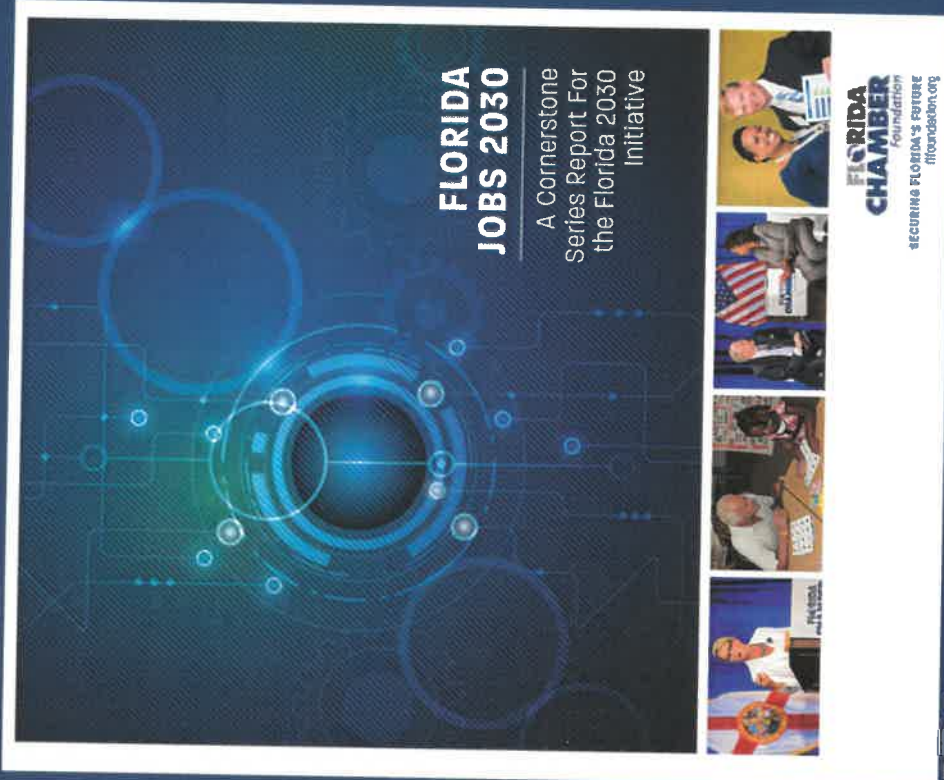


[www.FloridaChamber.com/FoundationResearch](http://www.FloridaChamber.com/FoundationResearch)

## “What is the single most important issue facing your business today?”

1. **Workforce Quality** – 27%
2. Economic Uncertainty – 12%
3. Growth Management Process – 8%
4. Government Regulations – 7%
5. Healthcare Costs – 7%

# Aligning Industry needs with workforce systems helps secure Florida's Future



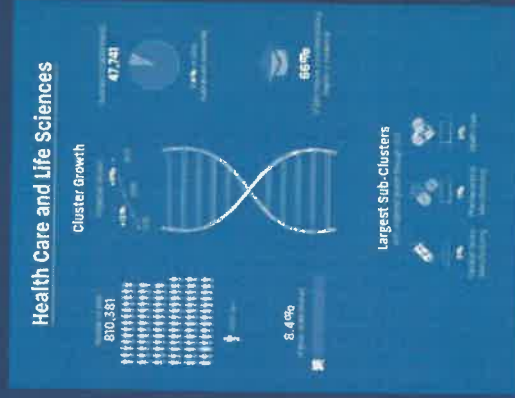
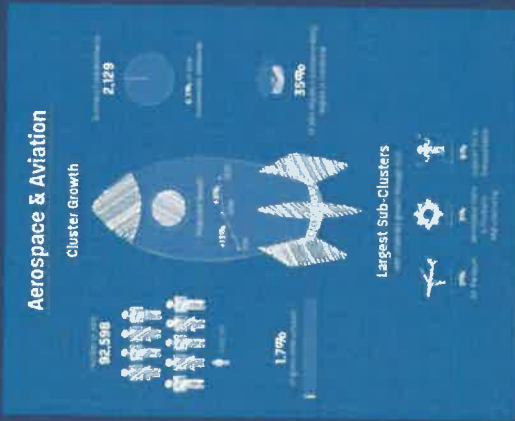
## FLORIDA JOBS 2030

A Cornerstone  
Series Report For  
the Florida 2030  
Initiative



**FLORIDA  
CHAMBER**  
Foundation  
SECURING FLORIDA'S FUTURE  
flfoundation.org

**FLORIDA  
CHAMBER**  
of Commerce



## Replacing Poverty With Prosperity Through Workforce Training

- Florida has 21,700,000 residents and over 10,000,000 Floridians in the workforce
- Unfortunately, Florida has approximately 3,000,000 residents in poverty of which 900,000 are children.
  - 50% of Florida's children living in poverty are in 15% (148 of 983) zip codes.
- According to Florida Chamber Foundation research, Florida has approximately 700,000 Floridians with disabilities who want to and/or are able to work.

*With 285,500 jobs looking for people, let's remember to include those in poverty and those with disabilities as they are an important solution to Florida's future.*





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Matthew K. Choy  
Director of Talent, Education  
and Quality of Life Policy  
mchoy@flchamber.com

Download this presentation at  
[www.FloridaChamber.com/TDC](http://www.FloridaChamber.com/TDC)

**FLORIDA  
CHAMBER**  
of Commerce

A nighttime photograph of a city skyline, likely Miami, with numerous skyscrapers illuminated and their lights reflected in the water. The sky is a deep blue with some light clouds.

# PROJECT SUNRISE

## Presentation to the Florida Talent Development Council



# Project Sunrise

An economic competitiveness  
strategy for the State of Florida



## The Project Sunrise assessment was built through iteration, leveraging a series of stakeholder engagement mechanisms, and building on several sources of insight



# Florida Today

There are great things happening in Florida today



Fastest projected GDP (4.5% FL vs 2.3% US) and pop growth (2% FL vs .7% US)



6<sup>th</sup> most VC/PE investment across emerging verticals (#1 in VR, #4 in Fintech)



Generally high-quality transportation infrastructure (#6 in road, #3 in bridge)



Low unemployment rate (3.3%) and positive job growth



4<sup>th</sup> ranked state on economic climate (i.e., GDP, F1000 HQs, jobs)



Low tax burden (#4 best business tax climate, #1 for individual tax climate)



#1 in Higher education, and #2 for affordability of high education

Going from good to great means pursuing opportunities to improve



Susceptible to shocks due to low share of tradeable sectors (4X recession decline vs US) (e.g., #49 in Industry Diversity Index)



Lagging in key talent scorecard metrics (e.g., science, technology, engineering, and mathematics [STEM])



Low R&D and sophistication, which lead to high startup activity but low (#46) survival rate



Middle of the road virtual infrastructure (#39 in “ultra-fast” internet access)



Ranked in bottom 10 among US states for tort environment

# Project Sunrise developed strategic goals for Florida, supported by potential options and example initiatives for policymakers to pursue

**Strategic goals:** Aspirations to achieve top-line economic growth: GDP, jobs, labor participation, productivity, wages/income

**Options:** A broad area to focus to drive key outcomes

**Initiatives:** Specific projects to achieve the strategic goals



**Strategies**









**Potential policy options**



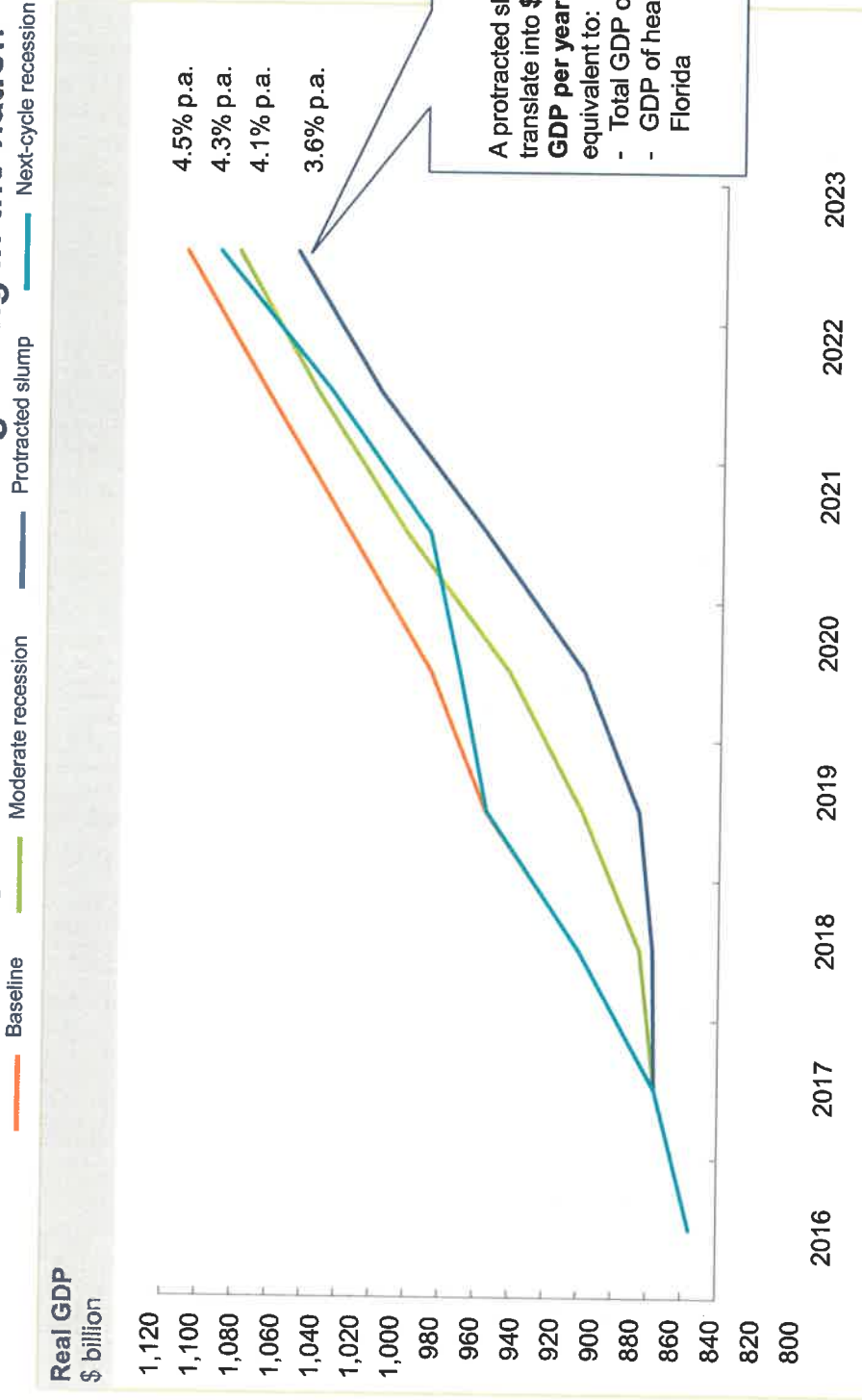
**Example Initiatives**

# Six strategies for Florida

 <b>Human capital</b>	 <b>Strategic rebranding</b>	 <b>EDOs</b>	 <b>Public investment</b>	 <b>R&amp;D and innovation</b>	 <b>Health</b>
<p><b>Make Florida the place where talent thrives</b></p> <p>Develop the state's talent pipeline and better match talent supply with economic demand</p>	<p><b>Strategically reposition Florida's image and reputation as a place to prosper</b></p> <p>Shape the national narrative on Florida using a comprehensive re-branding strategy</p>	<p><b>Create high-performance organizational capabilities</b></p> <p>Rethink the structure and role of the state's EDOs to maximize effectiveness based on external best practices</p>	<p><b>Grow the pie, and maximize ROI</b></p> <p>Apply public funding in a way that maximizes economic impact, and identify ways to increase available funds without raising taxes</p>	<p><b>Make innovation thrive</b></p> <p>Make Florida known as one of the most desirable, predictable, and highest-yielding opportunities for capital investment in the world</p>	<p><b>Make Florida the world's healthiest and the healthiest place to live</b></p> <p>Establish goals/policies that lead to Florida being recognized as the healthiest place to live in the world, including leveraging the state's existing strengths and assets to create healthy communities and a high-performing healthcare sector that competes on a global scale</p>



# Florida's economy is projected to be the fastest growing in the nation



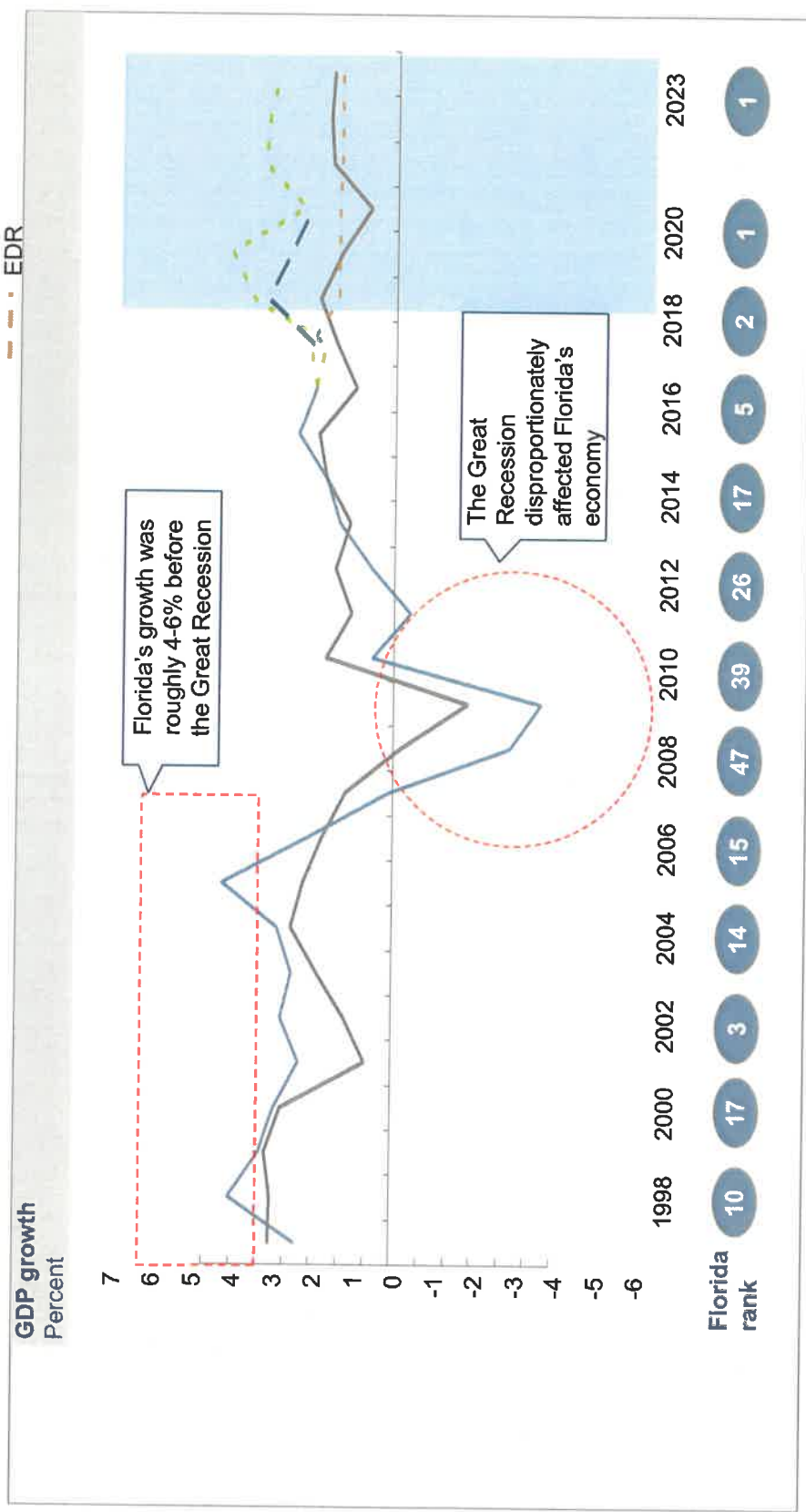
SOURCE: Moody's Analytics

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 DRAFT - 1/17/2018



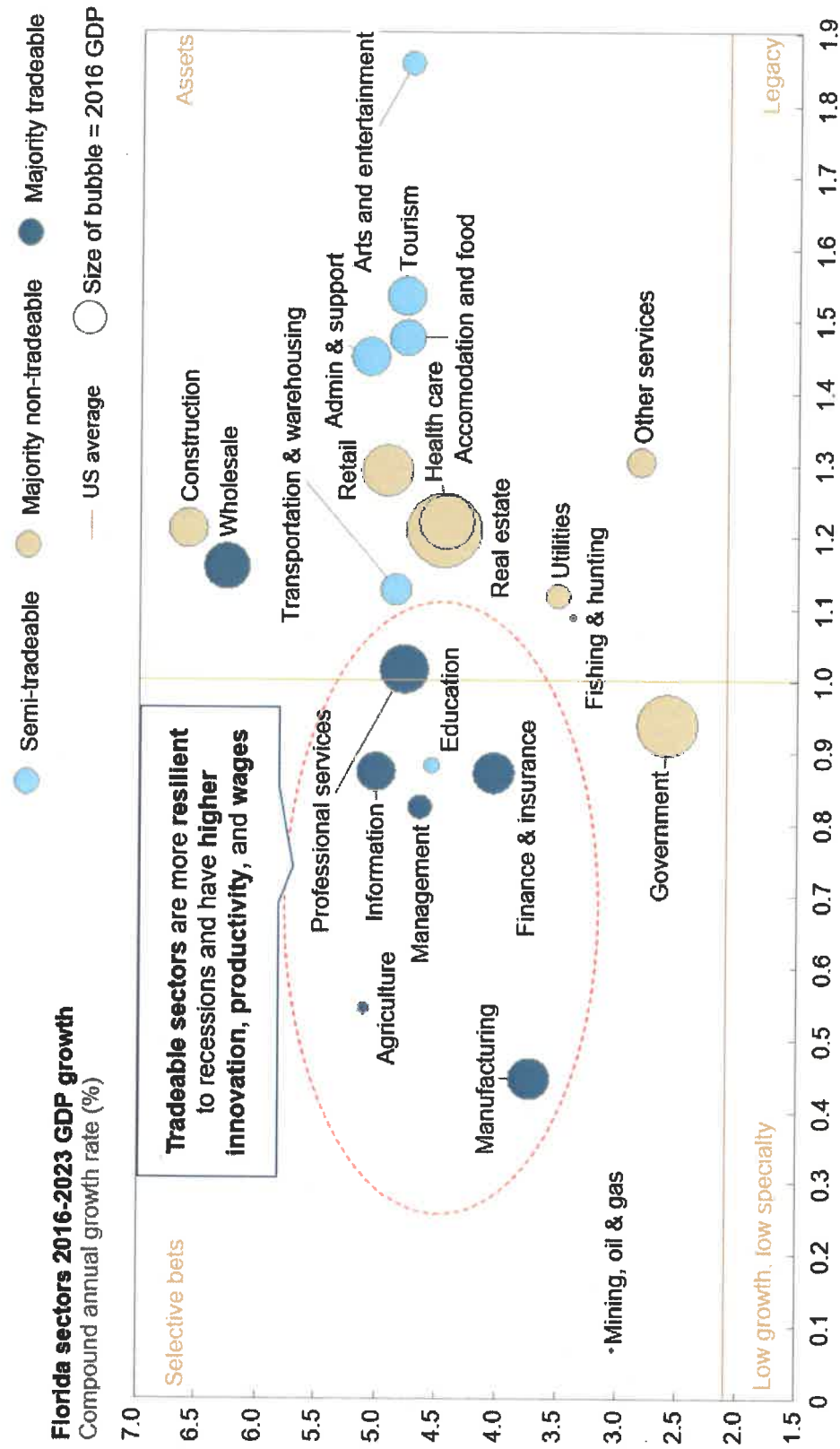


## However, Florida's economy is susceptible to external shocks, which can dampen growth



SOURCE: Moody's Analytics, Office of Economic and Demographic Research, University of Central Florida, US Bureau of Economic Analysis



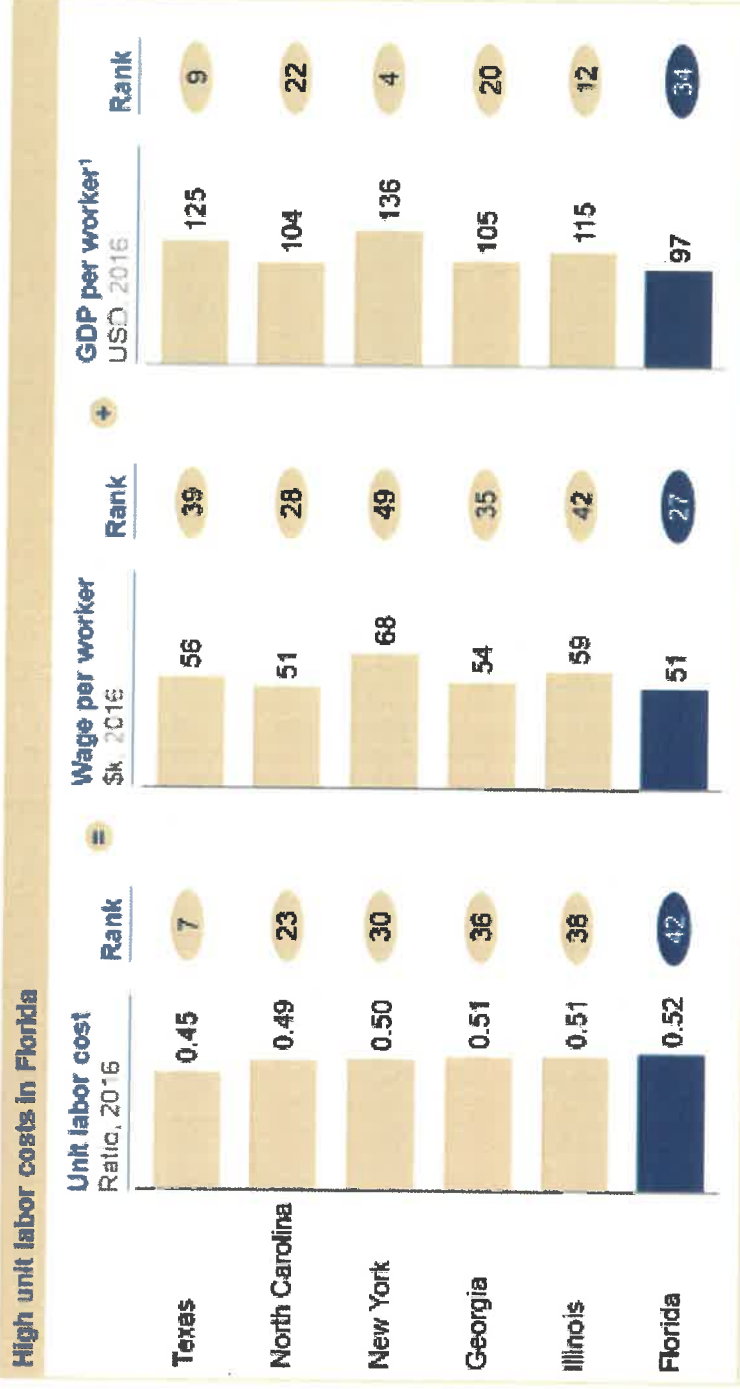


1 LQ is measured as the ratio of a sector's share of GDP in a region to that sector's share of GDP in the US

SOURCE: Bureau of Economic Analysis; Bureau of Labor Statistics; Moody's Analytics

**Specialization<sup>1</sup>**  
Location Quotient (LQ), 2016

## Despite paying lower wages, unit labor costs are higher in Florida as a result of low labor productivity



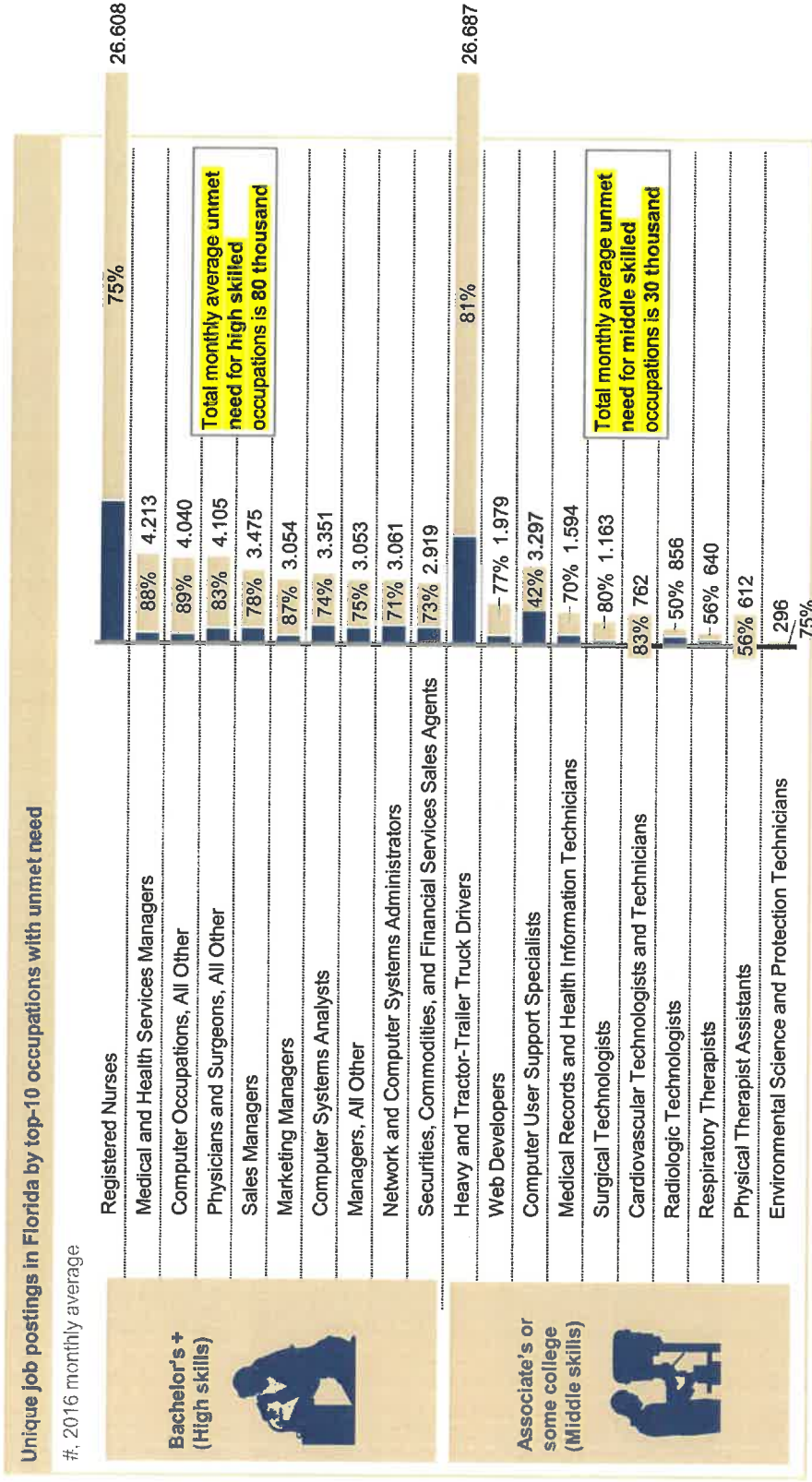
<sup>1</sup> Uses employment from the establishment survey  
 SOURCE: Bureau of Labor Statistics, Moody's Analytics



COMPLETING AND RE-EVALUATING  
 DRAFT, 1/9/2018

# High and middle skill occupations acute skills gaps

■ Hires ■ Unmet employer need<sup>1</sup>



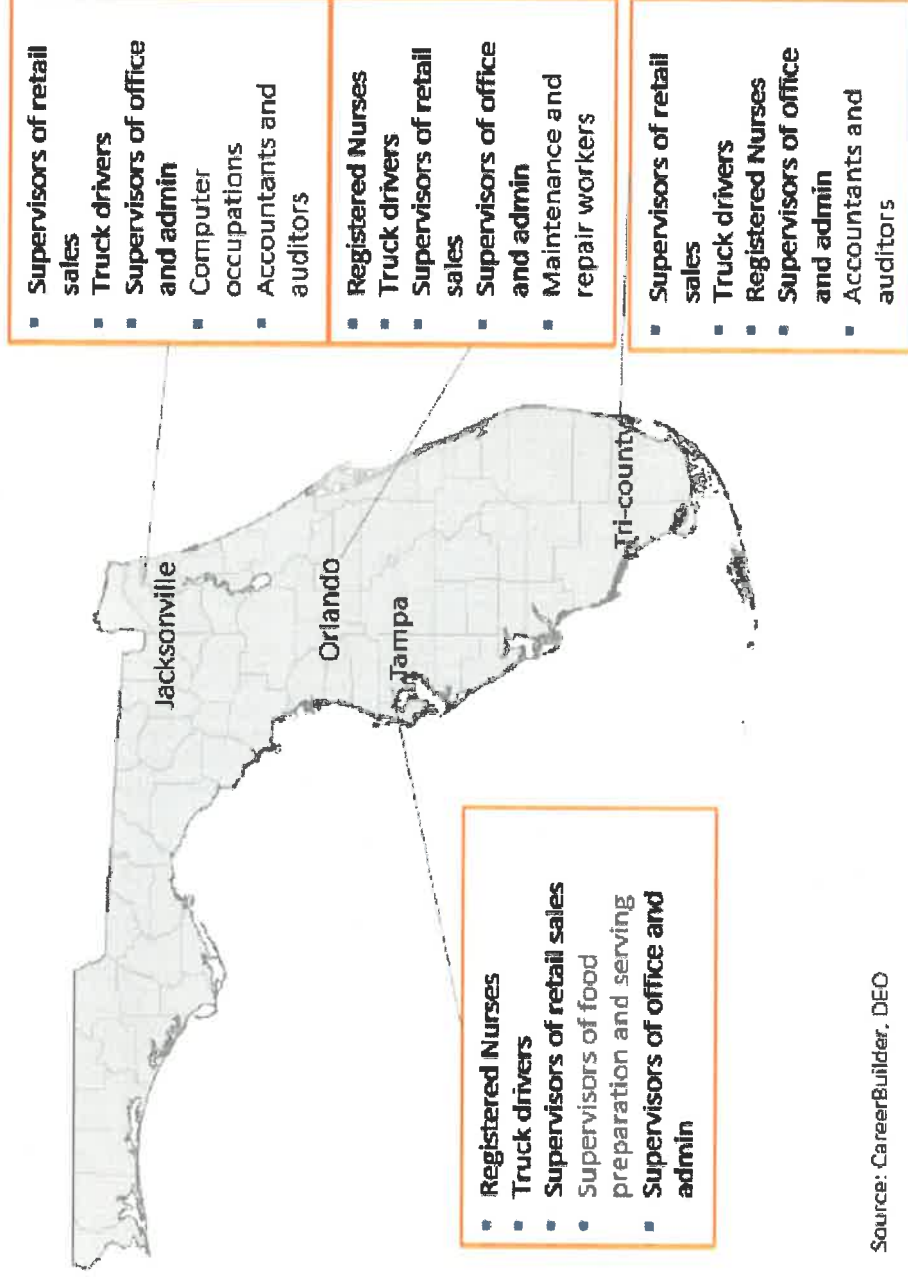
<sup>1</sup> Employer needs (i.e., unique job postings) not met by number of hires

SOURCE: Career Builder, Economic Modeling Specialists International (EMSI)



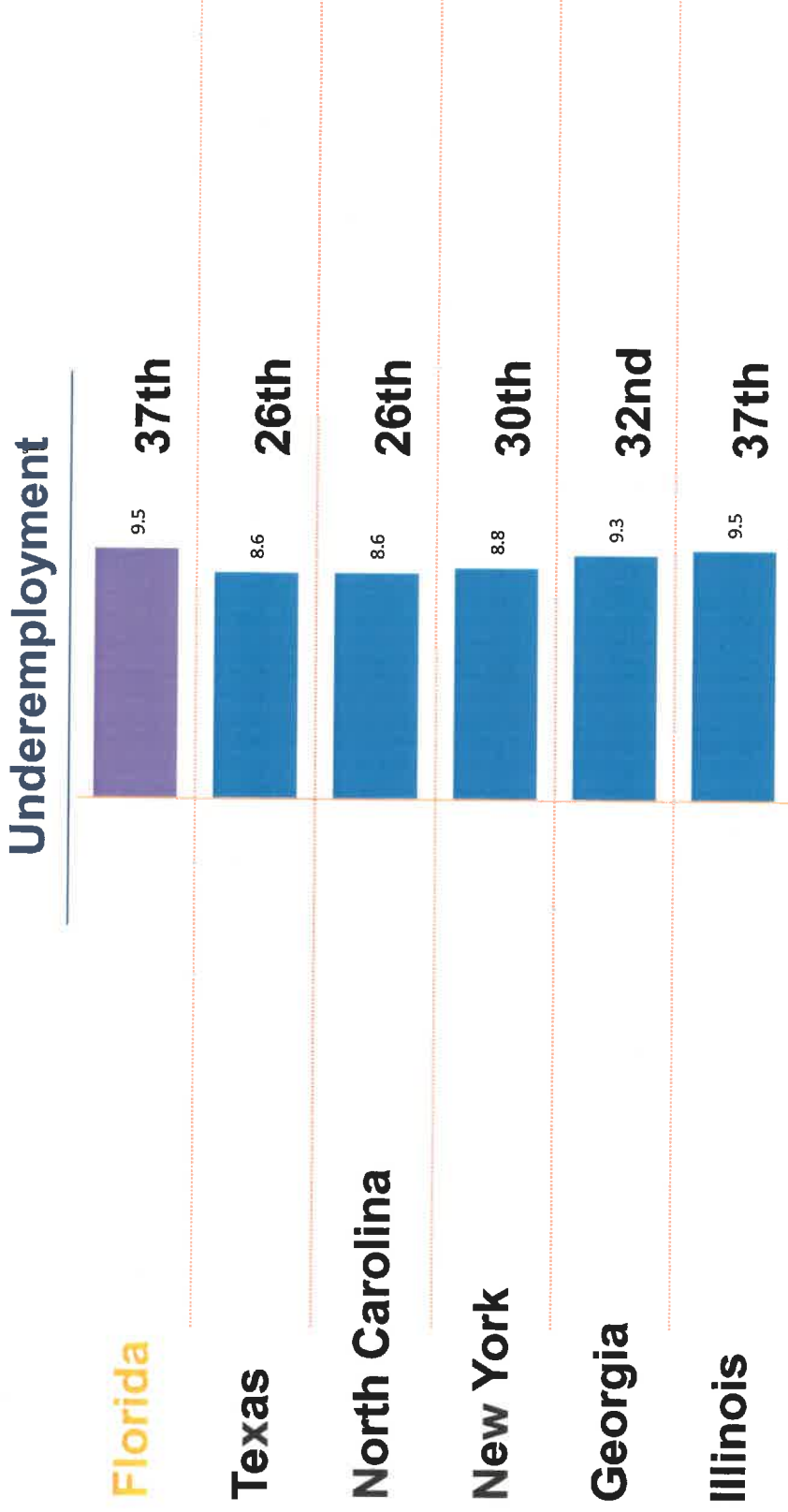
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## Top Occupational Gaps by Region (commonalities in bold)



Source: CareerBuilder, DEO

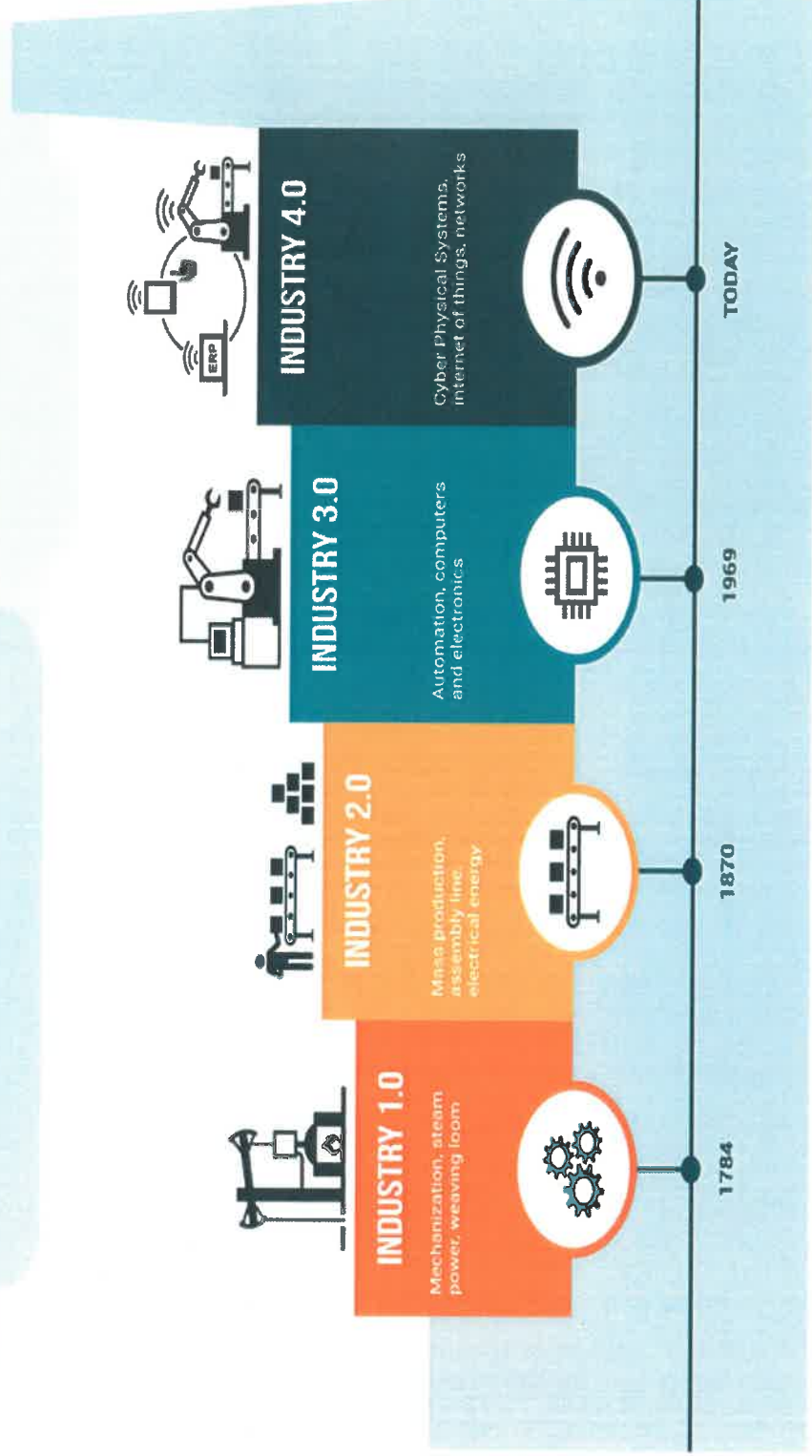
# While unemployment is low, FL has challenges with underemployment



SOURCE: US Bureau of Labor Statistics U5 & U6 discouraged/ involuntary part time

# INDUSTRIAL REVOLUTION

TRANSFORMING INDUSTRIES AND INNOVATION



# Twelve potentially economically disruptive technologies



## Mobile Internet

Increasingly inexpensive and capable mobile computing devices and Internet connectivity



## Next-generation genomics

Fast, low-cost gene sequencing, advanced big data analytics, and synthetic biology ("writing" DNA)



## Automation of knowledge work

Intelligent software systems that can perform knowledge work tasks involving unstructured commands and subtle judgments



## Energy storage

Devices or systems that store energy for later use, including batteries



## The Internet of Things

Networks of low-cost sensors and actuators for data collection, monitoring, decision making, and process optimization



## 3D printing

Additive manufacturing techniques to create objects by printing layers of material based on digital models



## Cloud technology

Use of computer hardware and software resources delivered over a network or the Internet, often as a service



## Advanced materials

Materials designed to have superior characteristics (e.g., strength, weight, conductivity) or functionality



## Advanced robotics

Increasingly capable robots with enhanced senses, dexterity, and intelligence used to automate tasks or augment humans



## Advanced oil and gas exploration and recovery

Exploration and recovery techniques that make extraction of unconventional oil and gas economical



## Autonomous and near-autonomous vehicles

Vehicles that can navigate and operate with reduced or no human intervention



## Renewable energy

Generation of electricity from renewable sources with reduced harmful climate impact





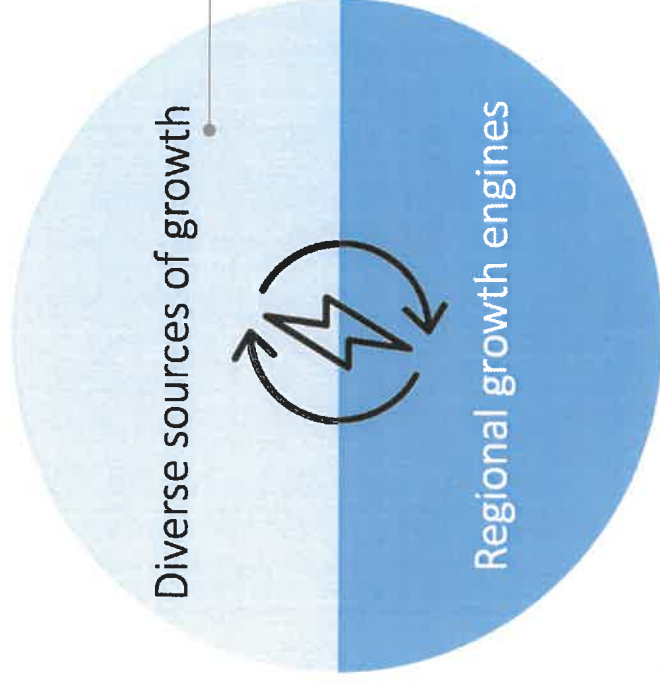
4 million  
disruptions...  
Industry  
4.0/4.5 jobs?

# Automation to 4.0





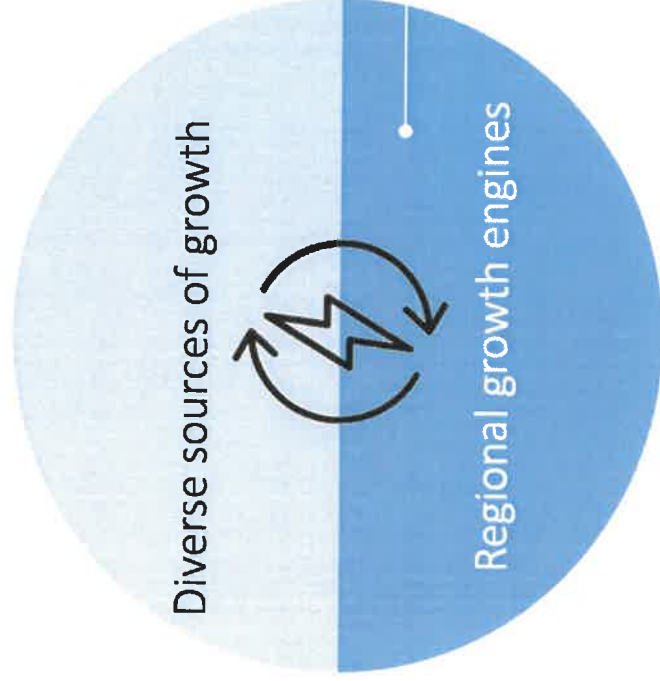
# The Florida of the future has a diverse economy and is driven by the state's most competitive regions



## Target high value sectors for growth

- Strengthen current high-performing sectors
- Determine sectors that may benefit from additional intervention
- **Boost resilience against shocks by identifying opportunities to diversify**
- **Focus on sectors with potential for job growth and higher wages**
- **Seize opportunities to capitalize on upcoming trends and emerging sectors**

## The Florida of the future has a diverse economy and is driven by the state's most competitive regions



### Fuel the state's regional engines

- Use the largest and fastest growing regions to power state growth (~70% of state GDP concentrated in four large metro areas)
- Focus on the region-specific development efforts that will drive local economic health, but also contribute to state's overall economy

# Governor Ron DeSantis Announces FinTech Priority Initiatives



**Governor DeSantis announces Fintech initiative that would benefit First Coast**



**Public-private partnership creates programs for Florida's state colleges and universities to focus on Fintech.**

# Florida Council of 100 Workforce Skills Survey

- 2018 survey
- 550 small, medium, and large businesses throughout FL
- Results = +/- 4.5%
- Conducted by Sachs Media Group

	Important Skill?	Most Important Skill?	Deficient in Skill?	Comment
Work Ethic / Professionalism	99%	38%	62%	
Teamwork / Collaboration	98%	13%	27%	Most deficient at small businesses
Critical Thinking / Problem Solving	96%	18%	52%	
Oral / Written Communication	94%	7%	35%	Less deficient at large businesses
Organization / Planning	92%	2%	28%	
Technical Skills Associated With Job	91%	15%	31%	More important the smaller the business is
Leadership	85%	6%	33%	
Digital Technology	80%	1%	5%	
Numbers / Statistics	71%	1%	10%	
Intercultural Fluency	59%	0%	6%	

# Human Capital: Make Florida the Place Where Talent Thrives

1. Adopt the PreK→Job model of the future to improve the organic talent pipeline and create a strategy that addresses these gaps, including training the talent required for the future in our PreK→Job system today
2. Develop new sources of talent by attracting out-side talent, increasing the labor force participation rate, and creating pathways to higher purpose opportunities
3. Retain and engage Florida's top talent through retention incentives
4. Leverage the existing university and college systems to increase the output of high-caliber talent
5. Identify labor market mismatches (especially in middle skills occupations) by region, sector and/or time horizon



