



**Workforce Florida (WFI) - Enhancing Business Engagement (EBE) Initiative
 EBE Steering Council Conference Call - Meeting Recap
 Friday, July 11, 2013, 9 a.m. - 10 a.m.**

Participants: Andra Cornelius, WFI
 Debbie McMullian, WFI
 Carmen Mims, WFI
 Jayne Burgess, WFI
 Dehryl McCall, WFI
 Cliff Atkinson, DEO

Lorri Shaban, TW squared
 Mike Bobroff, TW squared
 Pete Tesch, TW squared
 Ray Gilley, Solodev

EBE Steering Council Representatives present on the call: see page three of this document.

Meeting Summary

<p>Introductions and Welcome/Roll Call</p>	<p>Andra Cornelius, WFI welcomed the group and called roll. Andra briefed everyone on two significant meetings related to the EBE Initiative. First, on July 9, WFI’s management team met with key legislative staff and briefed them on the project. Second, the WFI Board of Directors was briefed on the initiative during the July 10 board meeting.</p>
<p>Steering Council Charter</p>	<p>Pete reviewed with the group the final draft Charter for the initiative including the outline of the project’s goals: business development improvement process, the creation of the “toolkit” and the goal of doubling the Employer Penetration Rate (EPR) in each RWB. Andra and Lorri joined Pete in expressing appreciation to the Core Team for their efforts in editing and producing the Charter document. Steering Council Charter is now posted to the WFI EBE Web Page at http://www.workforceflorida.com/PrioritiesInitiatives/EBE/ebe.php</p>
<p>Business Development Discussion Guide</p>	<p>Pete provided an overview of work performed with the help of WFI, Council and Core Team with respect to the types of questions pertaining to the assessment of the current RWB business development processes. More than 40 questions spanning 10 categories have been developed. This document will help guide RWB face-to-face interviews being scheduled for up to 12 RWBs statewide.</p>
<p>On-Line Survey and Schedule</p>	<p>Pete asked Lorri to inform the Council on the sequence and timing of steps to finalize and distribute the on-line survey to all 24 RWBs statewide. The on-line survey (Survey Monkey) will be emailed to the RWB Executive Directors and lead business liaisons on July 22</p>

	for completion by close of business on July 26. The survey is designed to be brief in nature (enabling its completion in 10 minutes or less). Lorri also described how the TW2 team will conduct follow-up in-person and phone interviews with BLs and EDs.
Discovery Report	Pete asked Mike Bobroff of TW2 to brief the SC on his efforts to date in drafting the document entitled <i>“Enhancing Business Engagement Business Development Process Services Existing Intelligence Report.”</i> Mike noted key state and local workforce information (e.g., RWB local plans, WFI training grant programs, WFI strategic projects) were incorporated in the report.
CRM/IT Assessment Overview	Lorri introduced Ray Gilley of Solodev. Ray provided a brief update on the CRM/IT component of the EBE project. WFI, through its USDOL EBE grant funds, has purchased Salesforce with 50 licenses. Distribution of these licenses throughout the workforce system has not yet been decided. Ray and Shawn Moore are working with selected RWBs to better understand how these RWBs are currently capturing data. He expressed appreciation to Workforce Alliance’s Gerry Genovese and the upcoming meeting in Palm Beach County in the next two weeks. Of key concern is elimination of double-entry of data by local staff.
Questions/Answers	There were several questions and significant conversation generated on the Salesforce CRM tool and its future implementation, including connections between Salesforce and EFM, as well as fields, access and reports. The team assured participants that one of its top priorities was linking both CRM systems and that all other concerns were being addressed as well. More information will be gathered in on-site visits and phone interviews.
Next Steps, Wrap-up & Adjourn	Andra and Lorri thanked the Council for their continuing involvement and participation. Pete reminded everyone of upcoming conference calls: CT call on July 25 at 9 am; SC call on August 9 at 9 am. Agendas and related documents / meeting recaps will be furnished in advance of the calls.

Attendance Roster

Friday, July 11, 2013, 9 a.m. - 10 a.m.

RWB #/ Organization	Name	Participated in Call
RWB 1 - Workforce Escarosa	Eric Flora	Yes
	Susan Nelms, Executive Director	Yes
RWB 2 - Jobs Plus	Kelly Jordan	Yes
RWB 3 - Chipola Regional Workforce Board	Kenny Griffin	Yes
RWB 4 - Gulf Coast Workforce Board	Katherine Motley	Yes
RWB 5 - Workforce Plus	Jim McShane, Executive Director	Yes
RWB 6 - North Florida Workforce Board	Sheryl Rehberg	No
RWB 7 - Florida Crown Workforce Board	Denise Wynn	Yes
RWB 8 - Worksource	Melissa Terbrueggen	No
RWB 9 - Gainesville Chamber & Florida Works	Kim Tesch-Vaught*	No
	Ian Fletcher	Yes
RWB 10 - Workforce Connection	Brenda Chrisman	Yes
	Rusty Skinner	No
RWB 11 - Center for Business Excellence	Ted Young	No
RWB 12 - Workforce Central Florida	Anika Holmes	No
	Shirley Walker	No
RWB 13 - Brevard Workforce Alliance	Judy Blanchard*	Yes
	Jennifer Lasser	No
RWB 14 - WorkNet Pinellas	No Representative	
RWB 15 - Tampa Bay Workforce Alliance	No Representative	
RWB 16 - Pasco Hernando Workforce Board	Ken Russ	No
	Steve Wilson	Yes
RWB 17 - Polk Works	Steve Carr	Yes
RWB 18 - Suncoast workforce	Joshua Matlock*	Yes
RWB 19 Heartland Workforce	Colleen Dukes	Yes
RWB 20 Workforce Solutions	Marcello Dossantos	No
RWB 21 - Workforce Alliance	Steve Craig*	Yes
	Gerry Genovese*	Yes
	Carol Carlson	Yes
RWB 22 - Workforce One	Tony Ash	Yes
RWB 23 - South Florida Workforce Board	Cheri Kavehersi*	No
RWB 24 - Southwest Florida Works	Peg Elmore	Yes
Workforce Florida	Jayne Burgess	Yes
Workforce Florida	Andra Cornelius*	Yes
Workforce Florida	Dehryl McCall	Yes
Workforce Florida	Debbie McMullian	Yes
Workforce Florida	Carmen Mims	Yes
DEO	Cliff Atkinson	Yes
	*Core Team Member	