

STEP 7: ADOPT MISSION, GUIDING PRINCIPLES, AND GOALS

Note: You may wish to e-mail various mission, guiding principles, and goals statements to group members prior to your meeting in order to expedite matters. Have them e-mail their responses, compile and rank them. Then develop potential mission statements, goals, etc. incorporating the group's most highly ranked responses. The group can then "wordsmith" these draft statements in the meeting as opposed to developing everything from scratch. The following is an example of a Planning Group Feedback Survey for Lee County. It includes four sections: Vision, Mission, Core Values/Guiding Principles, and Strategic Direction/Goals.

STRATEGIC PLANNING FOR WORKFORCE AND ECONOMIC DEVELOPMENT LEE COUNTY 2007

Directions

Enclosed you will find several sections for your review and comments. The first two sections address the vision and mission for the Lee County Workforce Development System. We have included representative statements from a number of workforce development initiatives from different states. These are provided for you to review and to give you an idea of what other areas have done. Following these examples, you are being asked to check off ideas you believe should be included in the vision and mission statements of Lee County's initiative. You are also given space to include any additional ideas or concepts that you think should be included in the vision and mission statements. When making comments, you need not be concerned about exact wording, syntax, etc. at this time. The information you provide on these documents will be collected, and draft statements will be prepared for your review at our next meeting.

The next section focuses on Core Values/Guiding Principles. Again, you will find a list of examples from other areas followed by an accompanying section that asks you to check those core values/guiding principles that you want to be representative of Lee County.

Following this exercise, you will find Strategic Direction/Goals examples for various areas. As stated above, these examples are there to help you examine what other regions/states have done in this area. You are being asked to select among various options, taken from the examples you have just read, those ideas you want included in the Strategic Direction/Goals plan for Lee County.

STEP 7.1

VISION

A vision is “an inspiring view of the preferred future.” It answers the question, “What do we want to become or achieve?” The vision is a broad, sweeping generalized statement of what the end result of the organization’s efforts can be. It also conveys to the public a succinct message about your aspirations as an organization. Some examples of vision statements drawn from web sites around the country are listed below:

- A world class workforce for Southeast Texas. (Southeast Texas Workforce Development Board)
- A highly competitive workforce for Brevard County. (Brevard County Workforce Board, Florida)
- To have a skilled, diverse, motivated, adaptable workforce. (Center for Workforce Innovations, Inc., Northwest Indiana WIB)
- To maintain and improve the economic vitality of the Ramsey County East Metropolitan Area by developing the best-trained, best-educated and most highly skilled workforce. (Ramsey County WIB, St. Paul, Minnesota)
- The Workforce Development System will connect businesses and job seekers and enhance the overall wealth of the community. (Los Angeles WIB, Los Angeles, California)
- People are more self-sufficient and better educated, thereby achieving full employment. Convenient, easy access to all services is provided through consolidation in a centralized one-stop system. The citizens of our communities are aware of the services available to them. A skilled workforce is in place, which enables business to be competitive in the ever-changing global economy. (West Central Texas Workforce Development Board)
- The San Diego region envisions a workforce investment system that supports the economic strategies of the region while meeting the needs of its residents, particularly those most in need of workforce services. (San Diego WIB, San Diego, California)
- Broward will create a healthy environment for business and family self-sufficiency, which results in better jobs with better pay for all segments of the community. Business will benefit from a trained and ready workforce. All job seekers, especially youth and those with significant barriers to employment, will have a better quality of life. (Broward County Workforce Board)
- In order to achieve sustainable economic growth, meet the demands of global competition in the modern economy and improve the quality of life for all Californians, California shall have a comprehensive workforce development system of education and workforce preparation linked to economic development that sets the standard for the nation and the world. (California Workforce Investment Board)

Please read the concept statements below. These concepts have been extracted from Vision Statements used by other Workforce Development Systems. After reading each of the statements, please choose up to five (5) concept statements that you believe could effectively guide the Lee County Workforce Development System. Most Vision Statements are one to three sentences in length; therefore, it is important to be selective in choosing the statements. Please indicate your preference by placing a checkmark [✓] next to the corresponding item.

- World class
- Highly competitive workforce
- Skilled, diverse, motivated, adaptable workforce
- Improve economic vitality
- Best trained
- Best educated
- Most highly skilled
- Workforce development system
- Connect with business and job seekers
- Convenient, easy access
- Consolidation
- Centralized one-stop system
- Skilled workforce
- Enable business to be competitive
- Support economic strategies
- Meet the needs of residents
- Better jobs
- Better pay
- Better quality of life
- Sustainable economic growth
- Comprehensive workforce development system
- Best practices – set the standard
- Coordinated public/private partnerships
- Effectively compete in the global marketplace
- Citizens have access to education and training, meet the needs of employers
- Other:
- Other:

STEP 7.2

MISSION

A mission is “a concise statement of the basic purpose and role of the organization.” It answers the question, “Who are we and what are we about?” A mission statement is designed to provide firm guidance in making important decisions. It is acceptable for an organization to have either a vision or a mission—the important thing is the embedded “message” you want to communicate throughout your organization and the larger community about who you are and what your business is. It establishes and helps maintain consistency and clarity of purpose throughout the organization. It helps the organization gain understanding and support from those people outside your organization who are important to your success. [George Morrissey, *A Guide to Strategic Thinking*, page 36]

- To facilitate and be the catalyst for training and educational services that are responsive to the employment needs of DeSoto, Hardee and Highlands counties. (Florida Heartland WIB)
- Equip Southeast Texans with skills and knowledge that meet the needs of employers to foster the region’s economic growth. (Southeast Texas Workforce Development Board)
- To provide an effective local service delivery system to place Texans in jobs and to equip workers with skills needed to foster economic development. (West Central Texas Board)
- To enhance the regional economy and quality of life by providing integrated workforce development services throughout the region. (Coastal Bend Workforce Development Board)
- To serve and empower all job seekers and employers through a flexible, customer-centered, streamlined, highly accountable and seamless delivery system. The BWDB will use the funding at its immediate disposal to serve those most in need and will take the lead in leveraging community resources. The BWDB will accomplish the mission through the use of a five-year strategic plan. (Broward County Workforce Board, Florida)
- Facilitate and be the catalyst for workforce development services that are responsive to the employment needs of Brevard County. (Brevard County Workforce Board, Florida)
- Oregon will have a world class workforce; well-educated, skilled, and working to keep Oregon’s economy competitive in the global marketplace. (State of Oregon’s Workforce Vision)
- A skilled and competitive workforce that promotes a diverse and prosperous economy. (State of Hawaii’s Workforce Vision)
- To provide strong leadership in achieving the success of the overall workforce development system, for the benefit of all California – its people, businesses and communities. (The California Workforce Investment Board)

STEP 7.3

CORE VALUES/GUIDING PRINCIPLES

Some boards expand on the mission statement to include guiding principles or core values that underlie the vision and mission of an organization. Guiding principles can help focus the group's mission. They can also inform the stakeholders and the public about the group's interests and intentions for the region.

THE WEST CENTRAL TEXAS WORKFORCE DEVELOPMENT BOARD:

Guiding principles and concepts of the Baldrige Criteria for Performance Excellence:

- o Visionary Leadership
- o Customer Focus
- o Organizational and Personal Learning
- o Valuing Employees and Partners
- o Agility
- o Focus on the Future
- o Managing for Innovation
- o Management by Fact
- o Public Responsibility and Citizenship
- o Focus on Results and Creating Value
- o Systems Perspective

THE BROWARD WORKFORCE DEVELOPMENT BOARD:

- o All citizens should receive the services they need to assist them in being self-reliant and economically self-sufficient.
- o Delivery services will be fast, cost-effective and flexible.
- o An emphasis will be placed on customer choice and customer service in a customer-friendly atmosphere for both job seekers and employers. The system should be flexible enough to accommodate all job seekers in a continuum of services from low to high levels of intervention (client advocacy).
- o Job seekers should be empowered to make decisions with information about the full range of services and provider performance data.
- o Job retention is more important than placement. Wage growth is more important than wage at placement.
- o Education is the key to better jobs at better pay. Education should begin the process of readying youngsters for the labor market, advanced training or college through school- to-work principles and practices.
- o High levels of accountability should exist through the development of strong performance measures and results orientation. Continuous improvement management principles will be applied.

- o The community should be knowledgeable about available resources and services. Marketing effort should be strong.
- o Employees and service providers must be well trained in the skills needed to accomplish the mission with the most up-to-date tools, such as computer software and access to the Internet.
- o Continued research and development activities should incorporate “best practices” in program design and delivery.

WORKFORCE FLORIDA, INC.:

- o Streamlined Services
- o Empowered Individuals
- o Universal Access
- o Increased Accountability
- o Local Board and Private Sector Leadership
- o Local Flexibility and Integration
- o Business-Driven
- o Commitment to Meaningful Careers
- o Support Economic Development
- o Leverage Statewide Resources

IOWA WORKFORCE DEVELOPMENT:

- o Integrity
- o Results/Outcome Orientation
- o Collaboration and Partnership (internal and external)
- o Data-Based Decisions
- o Long-Term Thinking
- o Manage Diverse Resources
- o Honor and Respect Diversity
- o Customer Focus
- o Leadership in the New Economy

THE OKLAHOMA OFFICE OF WORKFORCE DEVELOPMENT:

- o Employer Driven
- o Labor Market Focused
- o Centrally Guided and Supported
- o Collaborative
- o Accountable for Measurable Results

CUSTOMER-FOCUS

- Value and satisfaction may be influenced by many factors throughout your customer's overall purchase, ownership and service experiences. These factors include your organization's relationship with customers that help build trust, confidence and loyalty.
- Customer-driven organizations address not only the product and service characteristics that meet basic customer requirements, but also those features and characteristics that differentiate products and services from competing offerings. Such differentiation may be based upon new or modified offerings, combinations of offerings, customization of offerings, multiple access mechanisms, rapid response or special relationships.
- Customer-driven excellence is a strategic concept. It is directed toward customer retention, market share gain and growth. It demands constant sensitivity to changing and emerging customer and market requirements and the factors that drive customer satisfaction and retention. It demands anticipating changes in the marketplace; therefore, customer-driven excellence demands awareness of developments in technology and competitors' offerings, as well as rapid and flexible response to customer and market requirements.

VISIONARY LEADERSHIP

- An organization's senior leaders should set directions and create a customer orientation, clear and visible values and high expectations. The directions, values and expectations should balance the needs of all your stakeholders. Your leaders should ensure the creation of strategies, systems and methods for achieving excellence, stimulating innovation and building knowledge and capabilities. The values and strategies should help guide all activities and decisions of your organization. Senior leaders should inspire and motivate your entire workforce and should encourage all employees to contribute, develop and learn, be innovative and be creative.
- Senior leaders should serve as role models through their ethical behavior and their personal involvement in planning, communications, coaching, development of future leaders, review of organizational performance, and employee recognition. As role models, they can reinforce values and expectations, while building leadership, commitment and initiative throughout your organization.

ORGANIZATIONAL AND PERSONAL LEARNING

- Achieving the highest level of performance requires a well-executed approach to organizational and personal learning. Organizational learning includes both the continuous improvement of existing approaches and adaptation to change, leading to new goals and/or approaches. Learning needs to be embedded in the way your organization operates. This means that learning: (1) is a regular part of daily work; (2) is practiced at personal, work unit and organizational levels; (3) results in solving problems at their source ("root cause"); (4) is focused on sharing knowledge throughout your organization, and (5) is driven by opportunities to affect significant change and to do better. Sources for learning include employees' ideas, research and development (R&D), customers' input, best practice sharing and benchmarking.
- Organizational learning can result in (1) enhancing value to customers through new and improved products and services; (2) developing new business opportunities; (3) reducing errors, defects, waste and related costs; (4) improving responsiveness and cycle time performance; (5) increasing productivity and effectiveness in the use of all resources throughout your organization, and (6) enhancing your organization's performance in fulfilling its public responsibilities and service as a good citizen.

- Employees' success depends increasingly on having opportunities for personal learning and practicing new skills. Organizations invest in employees' personal learning through education, training and other opportunities for continuing growth. Such opportunities might include job rotation and increased pay for demonstrated knowledge and skills. On-the-job training offers a cost-effective way to train and better link training to your organizational needs and priorities. Education and training programs may benefit from advanced technologies, such as computer- and Internet-based learning and satellite broadcasts.
- Personal learning can result in: (1) more satisfied and versatile employees who stay with the organization; (2) organizational cross-functional learning, and (3) an improved environment for innovation.
- Thus, learning is directed not only toward better products and services but also toward being more responsive, adaptive and efficient - giving your organization marketplace sustainability and performance advantages.

VALUING EMPLOYEES AND PARTNERS

- An organization's success depends increasingly on the knowledge, skills, creativity and motivation of its employees and partners.
- Valuing employees means committing to their satisfaction, development and well-being. Increasingly, this involves more flexible, higher performance work practices tailored to employees with diverse workplace and home-life needs. Major challenges in the area of valuing employees include: (1) demonstrating your leaders' commitment to your employees; (2) providing recognition opportunities that go beyond the normal compensation system; (3) development and progression within your organization; (4) sharing your organization's knowledge so your employees can better serve your customers and contribute to achieving your strategic objectives, and (5) creating an environment that encourages risk taking.
- Organizations need to build internal and external partnerships to better accomplish overall goals. Internal partnerships might include labor-management cooperation, such as agreements with unions. Partnerships with employees might entail employee development, cross training or new work organizations, such as high performance work teams. Internal partnerships also might involve creating network relationships among your work units to improve flexibility, responsiveness and knowledge sharing.
- External partnerships might be with customers, suppliers and education organizations. Strategic partnerships or alliances are increasingly important kinds of external partnerships. Such partnerships might offer entry into new markets or a basis for new products or services. Also, partnerships might permit the blending of your organization's core competencies or leadership capabilities with the complementary strengths and capabilities of partners.
- Successful internal and external partnerships develop longer-term objectives, thereby creating a basis for mutual investments and respect. Partners should address the key requirements for success, means for regular communication, approaches to evaluating progress and means for adapting to changing conditions. In some cases, joint education and training could offer a cost-effective method for employee development.

AGILITY

- Success in globally competitive markets demands agility - a capacity for rapid change and flexibility. All aspects of e-commerce require and enable more rapid, flexible and customized responses. Businesses face ever-shorter cycles for introductions of new/improved products and services, as well as for faster and more flexible response to customers. Major improvements in response time often require simplification of work units and processes and/or the ability for rapid changeover from one process to another. Cross-trained and empowered employees are vital assets in such a demanding environment.
- A major success factor in meeting competitive challenges is the design-to-introduction (product/service initiation) cycle time. To meet the demands of rapidly changing, global markets, organizations need to carry out stage-to-stage integration (such as concurrent engineering) of activities from research and concept to commercialization.
- All aspects of time performance now are more critical, and cycle time has become a key process measure. Other important benefits can be derived from this focus on time; time improvements often drive simultaneous improvements in organization, quality, cost, and productivity.

FOCUS ON THE FUTURE

- In today's competitive environment, a focus on the future requires an understanding of the short- and long-term factors that affect your business and marketplace. Pursuit of sustainable growth and market leadership requires a strong future orientation and a willingness to make long-term commitments to key stakeholders - your customers, employees, suppliers and partners, stockholders, the public and your community. Your organization's planning should anticipate many factors, such as customers' expectations, new business and partnering opportunities, the increasingly global marketplace, technological developments, new customer and market segments, evolving regulatory requirements, community/societal expectations and strategic moves by competitors. Strategic objectives and resource allocations need to accommodate these influences. A focus on the future includes developing employees and suppliers, creating opportunities for innovation and anticipating public responsibilities.

MANAGING FOR INNOVATION

- Innovation is making meaningful change to improve an organization's products, services and processes and to create new value for the organization's stakeholders. Innovation should lead your organization to new dimensions of performance. Innovation is no longer strictly the purview of research and development departments; innovation is important for all aspects of your business and all processes. Organizations should lead and manage so that innovation becomes part of the culture and is integrated into daily work.

MANAGEMENT BY FACT

- Organizations depend upon the measurement and analysis of performance. Such measurements should derive from business needs and strategy, and they should provide critical data and information about key processes, outputs and results. Many types of data and information are needed for performance management. Performance measurement should include customer, product and service performance; comparisons of operational, market and competitive performance; and supplier, employee and cost and financial performance.

- Analysis refers to extracting larger meaning from data and information to support evaluation, decision-making and operational improvement. Analysis entails using data to determine trends, projections and cause and effect that might not otherwise be evident. Analysis supports a variety of purposes, such as planning, reviewing your overall performance, improving operations, change management and comparing your performance with competitors' or with "best practices" benchmarks.
- A major consideration in performance improvement and change management involves the selection and use of performance measures or indicators. The measures or indicators you select should best represent the factors that lead to improved customer, operational and financial performance. A comprehensive set of measures or indicators tied to customer and/or organizational performance requirements represents a clear basis for aligning all activities with your organization's goals. Through the analysis of data from your tracking processes, your measures or indicators may be evaluated and changed to better support your goals.

PUBLIC RESPONSIBILITY AND CITIZENSHIP

- An organization's leaders should stress its responsibilities to the public and the need to practice good citizenship. These responsibilities refer to basic expectations of your organization related to business ethics and protection of public health, safety and the environment. Protection of health, safety and the environment includes your organization's operations as well as the life cycles of your products and services. Also, organizations should emphasize resource conservation and waste reduction at the source. Planning should anticipate adverse impacts from production, distribution, transportation, use and disposal of your products. Effective planning should prevent problems, provide a forthright response if problems occur and make available information and support needed to maintain public awareness, safety and confidence.
- For many organizations, the product design stage is critical from the point of view of public responsibility. Design decisions impact your production process and the content of municipal and industrial wastes. Effective design strategies should anticipate growing environmental concerns and related factors.
- Organizations should not only meet all local, state and federal laws and regulatory requirements, but they should treat these and related requirements as opportunities for improvement "beyond mere compliance." This requires the use of appropriate measures in managing public responsibility.
- Practicing good citizenship refers to leadership and support of publicly important purposes (within the limits of an organization's resources). Such purposes might include improving education and health care in your community, environmental excellence, resource conservation, community service, improving industry and business practices and sharing non-proprietary information. Leadership as a corporate citizen also entails influencing other organizations, private and public, to partner for these purposes. For example, your organization might lead efforts to help define the obligations of your industry to its communities.

FOCUS ON RESULTS AND CREATING VALUE

- An organization's performance measurements need to focus on key results. Results should be used to create and balance value for your key stakeholders - customers, employees, stockholders, suppliers and partners, the public and the community. By creating value for your key stakeholders, your organization builds loyalty and contributes to growing the economy. Organizational strategy should explicitly include key stakeholder requirements. This will help to ensure that actions and plans meet differing stakeholder needs and avoid adverse impact on any stakeholders. The use of a balanced composite of leading and lagging performance measures offers an effective means to communicate short- and long-term priorities, monitor actual performance and provide a clear basis for improving results.

SYSTEMS PERSPECTIVE

- A systems perspective means managing your whole organization and its components to achieve performance excellence.

OTHER:

STEP 7.4

STRATEGIC DIRECTION/GOALS

The strategic direction is composed of goals that serve as the ends toward which the organization directs its efforts. Goals express the overall intent of the organization, define the shared outcomes for the organization or system and delineate how the organization will attain its vision. An organization can define both short-term and long-term goals.

Examples of goals from the Southeast Texas Workforce Development Board are listed below:

- Employers and job seekers choose the workforce centers as their first choice to meet employment needs.
- Ensure that Southeast Texas residents have access to high-quality labor market information and quality training services to facilitate finding jobs or obtaining better jobs in the local economy.
- The Workforce Development System will become recognized as a major contributor to the economic prosperity of Southeast Texas.
- Create a service mix that is sequential, comprehensive and includes strong work ethics, workplace foundation skills and value-added occupational skills training according to customer needs.
- Promote continuous career learning that fosters ongoing skill acquisition and self-development.
- Create strategies that lead to financial independence.

Goals referenced in the National Association of State Workforce Board Chairs publication, *The Competitive Challenge: Building a World-Class Workforce*:

- Design education and training programs customized to meet the diverse needs of employers and employees/students focusing on accessibility, responsiveness, modular curriculum, contextual learning and expanded e-learning opportunities.

- Increase technical assistance to small and medium-sized businesses, with a focus on streamlining workforce development program delivery and providing human resource services.
- Support state implementation and dissemination of a voluntary, industry-validated, nationally-recognized system of occupational certifications and skill standards.
- Promote the use of sectoral strategies and industry cluster support in partnering with businesses to train the workforce.
- Support states that use innovative approaches to address teacher shortages and teacher preparation.
- Actively promote lifelong learning, re-skilling and upgrading of the workforce.
- Design programs to meet the diverse needs of workers within the context of the workforce's changing demographics.
- Develop a system of creative incentives for human capital investments by individuals and businesses to fill critical skills gaps identified through community audits and to meet future needs identified in community economic development plans.
- Provide flexible funding to enable education and workforce development efforts to be agile and responsive to market demands.
- Focus on meaningful accountability measures across agencies, return on investment, and continuous improvement on program-specific performance measures, rather than bureaucratic.
- Transform the role of DOL's Employment and Training Administration from that of a regulatory agency to one focused on supporting state and local performance innovation.
- Transform the workforce system's image, culture and philosophy.
- Develop and disseminate a vision of a world class workforce system that is agile, responsive, innovative, business-driven, customer-oriented, performance-based, innovative, value-adding, and productivity-increasing.
- Position and promote the workforce development system as a system to serve all individual and business customers.
- Engage state and local education entities and economic development departments as full partners with state and local workforce investment boards.
- Overhaul labor market information systems at the federal and state levels to be more current, effective and user-friendly in providing quality data and analysis to make good business and career decisions.

Your Comments on Goals of the Lee County Workforce System:

Please read the concept statements below. These concepts have been extracted from strategic direction and goal statements used by other Workforce Development Systems. After reading each of the statements, please choose four to seven concept statements that you believe could effectively guide the Lee County Workforce Development System. Please indicate your preference by placing a checkmark [✓] next to the corresponding item.

- Workforce centers first choice of unemployed
 - Quality training
 - High-quality labor market information
 - Finding jobs and finding better jobs
 - Major contributor to the economic prosperity of Alabama
 - Comprehensive services
 - Training according to customer needs
 - Promote continuous career learning
 - Strategies that lead to financial independence
 - Design customized education and training programs to meet diverse needs
 - Be accessible, responsive, expanding e-learning options
 - Streamline workforce development delivery
 - Provide human resource services
 - Implementation of occupational certifications and skill standards
 - Partnering with business, education, training, economic development departments
 - Encourage innovative approaches
 - Promote lifelong learning & reskilling
 - Upgrading the workforce
 - Flexibility to be agile and responsive to market demands
 - Establish meaningful accountability measures across agencies
 - Encourage continuous improvement
 - Support state and local performance innovation
 - Transform workforce system's image, culture and philosophy
 - Customer-oriented
 - Value-adding
 - Performance-based
 - Measure success
 - Other:
-

Listed below are five examples of Strategic Direction statements that might guide the Lee County Workforce Development System. Please read each statement and place a checkmark [✓] next to each statement that you believe would serve the system well. Choose as many as you like.

Design a comprehensive, demand-driven Workforce Development System that serves as a vital resource capable of readily adapting to ever-changing occupational and economic demands in order to provide the highest level of service to the citizens of Lee County.

Engage a systems approach to fully integrate a Workforce Development System in Lee County that unites our education, employment services and economic development resources into a streamlined delivery system for the citizens and employers of our region.

Engage business and industry leaders, government officials, educators, legislators and other stakeholders as full partners in the Workforce Development System to strategically align priorities and enable Lee County to build a solid workforce and achieve the highest economic impact.

Enhance the Lee County Workforce Development System by creating an infrastructure that supports collaborative communication among the agencies serving our customers, makes effective use of all resources and allows a free exchange of information and ideas to benefit the citizens and employers of our region through a strengthened system.

Establish a comprehensive marketing plan to communicate the enhanced services that the local, regional and state Workforce Development Systems provide the citizens and employers of our region.

Other:
