

ATTACHMENT

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**Manatee Sarasota Workforce Funders' Collaborative
Downtown Development Authority Cover Sheet**

Organization Name: Manatee Sarasota Workforce Funders' Collaborative c/o Gulf Coast Community Foundation of Venice, Inc.

Date: August 25, 2009

Address (specify if changed since last application):
601 Tamiami Trail South
Venice, FL 34285

Phone: 941-486-4600 E-mail: mpritchett@gulfcoastcf.org

Web: www.gulfcoast.org

Executive Director or Board President (Include phone, e-mail):
Ms. Teri A. Hansen -President & CEO
thansen@gulfcoastcf.org

Primary Request Contact (include title, phone, e-mail):
Mark Pritchett
Vice President of Community Investment
941-486-4603
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Federal Tax Exempt ID #: 59-1052433

If applicant is not exempt from federal tax under section 501(c)(3), or as provided in section 4945 of the Internal Revenue Code, please identify your fiscal agent. Fiscal agents must be prepared to certify that they have entered into an agreement with the applicant regarding the use of the funds over which the fiscal agent will retain ultimate control and discretion. If funding is granted, the fiscal agent must acknowledge the terms of the grant by signing the grant letter.

Name: _____
Address: _____
Phone: _____ Web: _____
Contact person (title/e-mail): _____

Please note, concept papers from departments within multi-departmental institutions should list contact information of representative from the Development Office:

Request Amount: \$ 200,000 over 4 years.

Type of support (project, operating, capital/endowment): general operating and training grants

Organization's mission: The Manatee Sarasota Workforce Funders Collaborative (MSWFC) is dedicated to moving low-wage workers into higher-paying jobs while providing employers with the skilled employees they need. This "dual customer" approach is critical so that: 1) our working residents earn family-sustaining wages; 2) our employers have access to qualified employees; and 3) our region is economically competitive.

Program Area (check one more): Economic and Workforce Development

Project summary (must be 30 words or less): Advance lower-skilled adult workers in the Palmetto CRA target area into careers with family-sustaining wages through career coaching, job readiness/soft skills training and other support services while simultaneously helping employers fill skill shortages.

List target population, constituents, and geographic communities: Residents and businesses in the Palmetto CRA district

Organizational budget: Expenses: **\$13,180,300** Revenues: **\$26,883,040** Fiscal Year End: June 30.
Project or capital budget (if applicable): \$2.985 million spread over 3 years (mix of private and public funds) Grant Period: 3 years

Manatee Sarasota Workforce Funders' Collaborative

The Manatee Sarasota Workforce Funders' Collaborative (MSWFC) will serve as a regional workforce intermediary promoting a dual focused approach concerned with the needs of both workers and employers. It will focus on educational pathways and progress toward careers and family economic self-sufficiency for unemployed and low-skilled workers and provide flexible capital for industry-specific interventions with significant employer engagement. This dual-client approach to workforce development will strengthen the Bradenton-Sarasota region's capacity to attract and retain employers and professionals because it will help to focus attention and resources on areas of growth for the region and improvement of the skill sets necessary to successfully fulfill the needs of the employer. The MSWFC will not work in isolation but will develop strong partnerships with all stake holders.

MSWFC has been forming and organizing over the past 12 months, building a unique and historic partnership between the two counties. As part of our due diligence we commissioned a regional labor market analysis conducted by Dr. Chris Benner, Labor Economist at the University of California—Berkeley. The analysis suggested significant opportunities to build career ladders in four industry sectors—health care (most clearly), technology, manufacturing, and transportation and warehousing. There is strong evidence that creating a pipeline of services that supports both new entrants and incumbent workers in those industries can provide multiple avenues for low-income, low-skilled individuals to move into the sector and then develop the skills to obtain higher wage jobs and family self-sustainability. This intervention will also increase the attractiveness of attracting and retaining businesses in the bi-county area.

Leadership for MSWFC has also been established. MSWFC will be governed by a board of investor-peers with one vote per investor—led by two co-chairs: the Vice President for Community Investment at Gulf Coast Community Foundation of Venice (GCCFV) and the Executive Director of the Central Community Redevelopment Agency (CCRA). GCCFV is in Sarasota County and will manage the collaborative's finances. The CCRA is in Manatee County and will manage the programs. Pending the recruitment and assembly of the Funders' Governance Board, interim leadership is provided by a Planning Committee, currently comprising of not only the CCRA and GCCFV, but representatives from the Cities of Bradenton and Sarasota, the Economic Development Corporations of Sarasota and Manatee Counties, the Chambers of Commerce of Manatee County and Greater Sarasota, the United Ways of Sarasota and Manatee Counties, the University of Miami at IMG Academies, the Knight Foundation, the Helios Foundation, Neighborhood Services of Manatee County, FCCI Insurance Group, and Nonprofit Know-How. Any investment into the MSWFC will afford the Palmetto CRA a seat on the policy board. This will allow the PALMETTO CRA to be involved in determining policy as well as selecting appropriate interventions. All PALMETTO CRA funds, as is the case with the CCRA funds will be restricted to usages for the benefit of CRA residents.

The Need

There is a clear need in the Manatee-Sarasota region for this type of intervention in the existing workforce system.

- unemployment in the two counties ranges from 11.1 to 12.2 percent;
- in Manatee County, minority ethnic groups account for 24.2% of the population;
 - those groups have lower educational attainment, higher unemployment, and lower earnings
- The mean annual wage in the metropolitan area is \$35,640,
 - ◆ 4.4% less than the Florida average
 - ◆ 12.4% less than the national average;
- one in every ten of our Manatee-Sarasota neighbors lives below the poverty line.

Despite the high regional unemployment, many employers in a variety of industries still face critical shortages of skilled workers.

Until 2007, the Manatee/Sarasota County economy was driven by real estate, construction, and tourism. Since 2007, falling real estate prices, excess residential inventory, and declining tourist revenues have paralyzed our growth, sloughing jobs and stranding our working families.

Manatee Sarasota Workforce Funders' Collaborative

This places our service area among the hardest hit in Florida—a state that is among the hardest hit in the nation.

Our Plan

By targeting the most promising sectors of the economy, the MSWFC can serve as an intermediary and broker between service providers and high-growth businesses to provide greater prosperity to our families and our region—new jobs and new skills. The MSWFC has identified eight issues to be addressed by the funders' collaborative:

- Business needs of employers;
- Funding sources;
- Skills deficits of low-skilled workers;
- Gaps in career ladders;
- The first ever public/private bi-county workforce development initiative;
- Communication among industry, business, and education enterprises;
- Talent development and Industry retention projects throughout the region;
- Diversification of the Manatee/Sarasota economy.

The primary activities of the Workforce Funders' Collaborative will be to:

Coordination

- Align training with targeted employment sector needs
- Build a pipeline from training institutions to employers
- Align goals and identify niches

Collaboration

- Leverage new and existing resources—enhancing ROI for community stewards
- Leverage collaborative strengths to attract resources
- Grow the region's own workforce from *within* the region

Transformation

- Increase income for working people
- Increase the number of living wage jobs
- Increase the number of working families above area median income
- Change the mindsets of workers in low wage jobs: opportunities for advancement *do* exist
- Allow workers and businesses to be competitive, reaching their potential and achieving a high standard of living

Outcomes

The MSWFC's efforts will be leveraged against programs currently being undertaken by the region's workforce organizations. The Manatee Chamber and the Economic Development Corporation are already executing a set of specific industry, entrepreneurial, and partnership strategies. The Greater Sarasota Chamber of Commerce is beginning the second year of its five-year strategic program Sarasota Tomorrow. The Economic Development Corporation of Sarasota County has completed its most recent strategic plan and is in implementation. Enterprise Florida is developing the *Roadmap to Florida's Future* over the summer. The Suncoast Workforce Board is also beginning a period of strategic expansion.

The MSWFC has set a goal of directly placing up to 300 of Manatee/Sarasota's low-income, low-skilled workers into promising, career-oriented jobs. Any contribution by the PALMETTO CRA will allow for a percentage of those slots to be secured for residents of the PALMETTO CRA. In doing this, we will also directly assist at least ten area employers in the identified industry sectors to recruit and advance the careers (from entry-level to mid-skill-level jobs), and retain employees. A minimum of one business residing within the boundaries of the PALMETTO CRA will be identified and included in this intervention.

The MSWFC's early research and experience indicate that forging this important funding collaborative is both timely and prudent. Of an open-ended battery of possible workforce assessment and coordination activities, the following will have the optimum effect for both employers and workers:

Manatee Sarasota Workforce Funders' Collaborative

- Instituting a dual-customer model (employers and workers);
- Adding the value of regional/big picture teamwork;
- Cataloging all service providers and improving delivery of services to industry;
- Sharing and accessing valuable tools and technical resources as part of national Initiatives;
- Maximizing pooled resources among the collaborating agencies and organizations;
- Inspiring regionalism with a large, flexible funding pool aimed towards regionally-scaled endeavors.

The MSWFC has set out its overarching strategy to strengthen and accelerate regional workforce development. Effective implementation of each of these tactics will enhance program efficiency, increase the number of jobs filled in the PALMETTO CRA service area and the region as a whole, increase the training opportunities and employability of PALMETTO CRA residents, and accelerate the economic return on investment for our funders and the regional community. The MSWFC will coordinate workforce programming—collaborating to ensure efficiency and to transform the workforce landscape.

Analysis of current programmatic overlap and duplication is underway through group and one one-one convenings with employers and service providers as well as ongoing communication, coordination, and consultation among user and funder groups.

Existing Support

The Knight Foundation has contributed \$75,000 for planning, formation, and initial operations of MSWFC and the CCRA has contributed \$45,000. Additionally, the CCRA has committed an additional \$200,000 to the MSWFC's launch. The Knight Foundation has recently approved an additional \$1,000,000 contribution to this initiative. This very clearly illustrates its commitment to the project and to this area. The DDA has committed \$200,000 to this initiative. This puts the area CRAs in a very favorable position regarding the oversight and governance of this initiative. The Gulf Coast Community Foundation is assisting MSWFC in preparation for a proposal to their board, and other funders are currently considering significant contributions. Such commitments will be formalized in the next four months.

The National Fund for Workforce Solutions (NFWS)—a \$30 million national effort designed to strengthen and expand high-impact workforce initiatives around the country—has co-invested in 22 regions around the country to address employer needs, provide career advancement opportunities, and improve workforce development systems through sector-based workforce partnerships. This fall the Manatee-Sarasota Counties region has an historic opportunity to become the first National Fund site in the entire Southeastern United States. It will also be positioned as a national innovator of workforce solutions. Success in funding the MSWFC at the goal level of \$2 million will qualify the organization for a matching grant of \$450,000 from the NFWS leveraging nearly an additional 25% above the local investors' total commitment.

Current Planning Partners

MSWFC currently partners with the following agencies and organizations for purposes of program planning until recruitment and assembly of the permanent governing body:

- The Manatee Chamber of Commerce
- The Manatee County EDC
- The Greater Sarasota Chamber of Commerce
- The Economic Development Corporation of Sarasota County
- Enterprise Florida
- The Suncoast Workforce Board

MSWFC has invited and will continue to cultivate formal partnerships with institutions of higher education in the region, among them:

- University of South Florida
- The New College
- State College of Florida (Manatee County)
- The Ringling College of Art & Design
- Phoenix University
- Webster University

Manatee Sarasota Workforce Funders' Collaborative

- Eckerd University

The Manatee Sarasota Workforce Funders' Collaborative would like to invite the PALMETTO CRA to play a pioneering role in the future successes of the MSWFC's innovative workforce development initiatives, and thus the economy of the region, by investing in the collaborative. We respectfully request \$200,000 over four years (\$50,000 annually).

Manatee Community Action Agency Proposal

Name of Organization: GCCF for the Manatee Sarasota Funder's Collaborative
 Year: 2009-2012

- * Include revenues for THIS PROJECT ONLY on this page.
- * Not all the entries below may apply to your organization. Leave those items blank that do not apply.
- * For multi-year revenue, please submit budgets for each year.
- * Cells have been formatted for commas and columns will total at the bottom of the page. Shaded columns contain formulas and should not be edited.

Project Revenues	Knight Foundation Share	All non-Knight Funds	Total	Knight Foundation %
Contributed Income				
1. Individual contributions	-	-	-	
2. Corporate contributions	-	-	-	
3. Foundation grants	1,000,000	450,000	1,450,000	69%
4. Federal government support	-	-	-	
5. State government support	-	-	-	
6. Local government support	-	800,000	800,000	0%
7. Parent organization support	-	-	-	
8. Special events	-	-	-	
9. In-kind contributions	-	-	-	
10. Other (specify):				
National Fund for Workforce Solutions		450,000	450,000	0%
Suncoast Workforce Board		150,000	150,000	0%
United Ways (Manatee, Sarasota & Tampa Bay - \$45,00 each)		135,000	135,000	0%
Earned Income				
11. Fees for services	-	-	-	
12. Admissions	-	-	-	
13. Memberships	-	-	-	
14. Publications and royalties	-	-	-	
15. Contracted services	-	-	-	
16. Rentals	-	-	-	
17. Other (specify):				
Other Income				
18. Investment	-	-	-	
19. Interest	-	-	-	
20. Other (specify)				
Total Revenues	\$ 1,000,000	\$ 1,985,000	\$ 2,985,000	34%

Manatee Community Action Agency Proposal

Name of Organization: GCCF for the Manatee Sarasota Funder's Collaborative
 Year: 2009-2012

- * Include expenses for **THIS PROJECT ONLY** on this page.
- * Not all the entries below may apply to your organization. Leave those items blank that do not apply.
- * For multi-year expenses, please submit budgets for each year.
- * No depreciation expense for items purchased as part of this grant should be included
- * Cells have been formatted for commas and columns will total at the bottom of the page. Shaded columns contain formulas and should not be edited.

Project Expenses	Knight Foundation Share	All non-Knight Funds	Total	Knight Foundation %
1. Program salaries and wages (specify):				
Project Director	76,500	148,500	225,000	34%
Project Assistant (part-time)	35,700	69,300	105,000	34%
2. Administrative salaries and wages (specify)				
3. Consultant/Contract services (specify):				
evaluation	30,600	59,400	90,000	34%
communications	36,720	71,280	108,000	34%
4. Other salaries and wages (specify):				
5. Employee benefits	33,660	65,340	99,000	34%
6. Administrative expenses				
7. Travel	12,240	23,760	36,000	34%
8. Supplies and materials	3,400	6,600	10,000	34%
9. Rent				
10. Utilities				
11. Insurance				
12. Legal fees				
13. Accounting fees				
14. Other professional fees (specify):				
15. Taxes				
16. Printing and publications	35,700	69,300	105,000	34%
17. Postage and shipping	10,200	19,800	30,000	34%
18. Marketing	30,600	59,400	90,000	34%
19. Fund raising				
20. Capital expenses				
21. Overhead/indirect (specify):				
Gulf Coast Comm. Foundation - financial (5%)	53,039	102,957	155,996	34%
Central Community CRA - operations (6.8%)	56,429	128,950	195,379	34%
22. Depreciation				
23. Other (specify)				
capacity building, public policy grants	197,200	382,800	580,000	34%
workforce partnership grants	392,912	762,713	1,155,625	34%
Total Expenses	\$ 1,014,900	\$ 1,970,100	\$ 2,985,000	34%



RUDDER TEAM RETREAT

MANATEE SARASOTA WORKFORCE FUNDERS COLLABORATIVE

September 28, 2009 | Gulf Coast Community Foundation of Venice | 7:30 a.m. - 11:00 a.m.

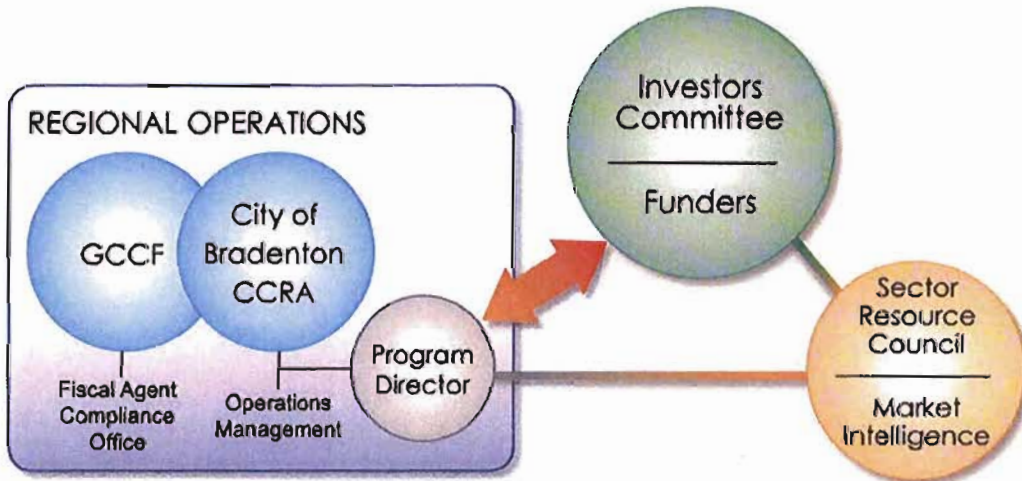
ATTACHMENT A



MANATEE SARASOTA WORKFORCE FUNDERS COLLABORATIVE

THUMBNAIL ON ROLES | Discussion Document - Draft Only | September 28, 2009

MANATEE SARASOTA WORKFORCE FUNDERS COLLABORATIVE





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- ▶ Sets Policy Expectations for Critical Projects
- ▶ Responsible for Relationships with Regional Operations Team
- ▶ Potential Hiring or Outsourcing Accountability of "General Manager" of Collaborative
- ▶ Responsible for Funding Portfolio of Critical Projects - As Individual Fiduciaries
- ▶ Responsible for Funding Portfolio of Critical Projects - As Board Team
- ▶ Ultimate Strategic and Performance Oversight
- ▶ Sets Priorities for Order or Staging of Work within the Portfolio



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- ▶ Managed by the Program Director
- ▶ Regional Team of Experts, Agency Leaders, Sector Employers Providers, Economic Developers, and Others
- ▶ A Platform to Share and Compare Information, Trends, and Issues
- ▶ A Forum to Review Performance Data and New Ideas Pertinent to MSWFC
- ▶ Ambassadors for the Initiative
- ▶ Refine Operational Projects
- ▶ Not a Policy Function



RUDDER TEAM RETREAT

MANATEE SARASOTA WORKFORCE FUNDERS COLLABORATIVE

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REGIONAL OPERATIONS



Fiscal Agent
Compliance
Office

- ▶ Fiscal Agent and Compliance Office
 - *Manages MSWFC Funds, Receipts, Gifts, and Grants as a Part of its Existing Foundation System*
 - *Supports the Issuance of Funds, Payments, Rents, and Leases to Contractors, Partners, Consultants, and other Providers of Services or Infrastructure to the Furtherance of MSWFC*
- ▶ Grants Compliance Manager
- ▶ Program Assessments
- ▶ Annual Report – Finance and Compliance



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- ▶ Operations Manager
- ▶ Logistics Support for Investors Committee and Sector Resource Council
- ▶ Printing and Publications
- ▶ Events Manager
- ▶ Project Oversight in Partnership with GCCF
- ▶ Project Manager
- ▶ Critical Infrastructure, Including IT
- ▶ Consultant/Service Provider Liaison and Contract Management
- ▶ Annual Report – Projects and Programs