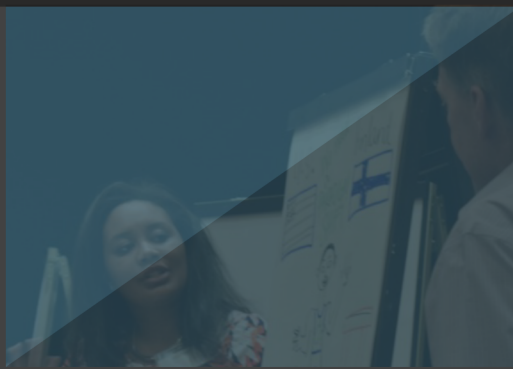


LEADERSHIP FLORIDA STRATEGIC PLAN, 2019-2023



LEADERSHIP FLORIDA FAMILY AND SUPPORTERS:

We are excited to present to you Leadership Florida's 2019-2023 Strategic Plan!

The process to produce this plan has been extensive. The Strategic Planning Committee received, considered and integrated specific input provided by more than half of our members and a wide variety of stakeholders. The passion that our members and stakeholders have for Leadership Florida is refreshing.

The strategic planning process has validated the important and unique role that Leadership Florida serves and its value to our members and to our state. We have been reminded of precisely what our organization is and what it is not. Our value proposition to current and future members remains our class programs, post-class experiences and the relationships that we form through active involvement in Leadership Florida – relationships that equip our members to better serve the state of Florida.

The 2019-2023 Strategic Plan is intended to provide a guidepost to ensure Leadership Florida's continued success as we and our members and stakeholders embrace the challenges and opportunities in front of us.

We look forward to partnering with you as we continue to serve Leadership Florida and the state.



Mike Freed
Strategic Planning Committee Chair



Pam Rauch
Board Chair



2019-2023 STRATEGIC PLAN

EDUCATE, ENGAGE, INSPIRE... TOGETHER WE LEAD.

MISSION

We convene a statewide community of leaders to recharge their leadership skills and to educate and inspire them to work for a better Florida. We provide meaningful forums for sharing essential information and viewpoints; we create opportunities for experiences that are inviting, inspiring and of lasting value.

VISION

As a strong, trusted, diverse and growing community of Florida leaders, we are an important catalyst for creating new opportunities for our state through our powerful connection to one another.

VALUES

We are unified in our respect for and accessibility to one another, and in our passion for Florida. We draw strength from our diversity.

WHO IS LEADERSHIP FLORIDA?

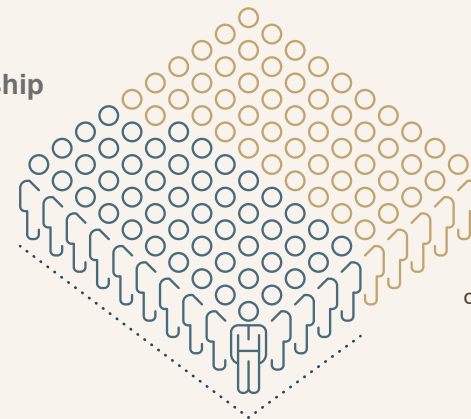
Leadership Florida is a unique organization that takes a holistic view of the conditions and challenges facing our great state and offers a continuum for expanding the impact of community leaders across the state. Created in 1982 by the Florida Chamber of Commerce, Leadership Florida seeks to build a sense of statewide community by identifying and educating individuals who have the passion, commitment and positioning to help make great things happen.

The individual contributions of nearly 1,300 active Leadership Florida members are multiplied by their collective strength and enhanced by the distinct and diverse regions of Florida in which they reside. The members of Leadership Florida are dedicated not only to their local communities, but also to the statewide community of Florida.

From its vibrant annual classes, to active region groups, to its broad committee structure encouraging long-term involvement by all members, Leadership Florida is a dynamic organization designed to promote statewide leadership. While leadership programs exist locally and in many other states, none rival Leadership Florida's ambitious class offerings.

Knowledge is a key element of leadership, and each Leadership Florida program is designed to enhance understanding of issues critical to Florida. Leadership Florida also develops bonds among Floridians who combine their talents and resources to build an even greater Florida, community by community.

Of the **2,549**
graduates
of existing Leadership
Florida Programs,

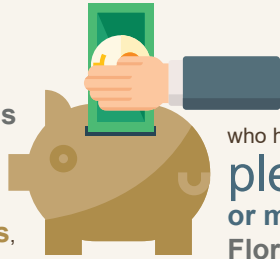


52%
(1,299)
are **active**
members
of the organization.

WHERE HAVE WE BEEN?

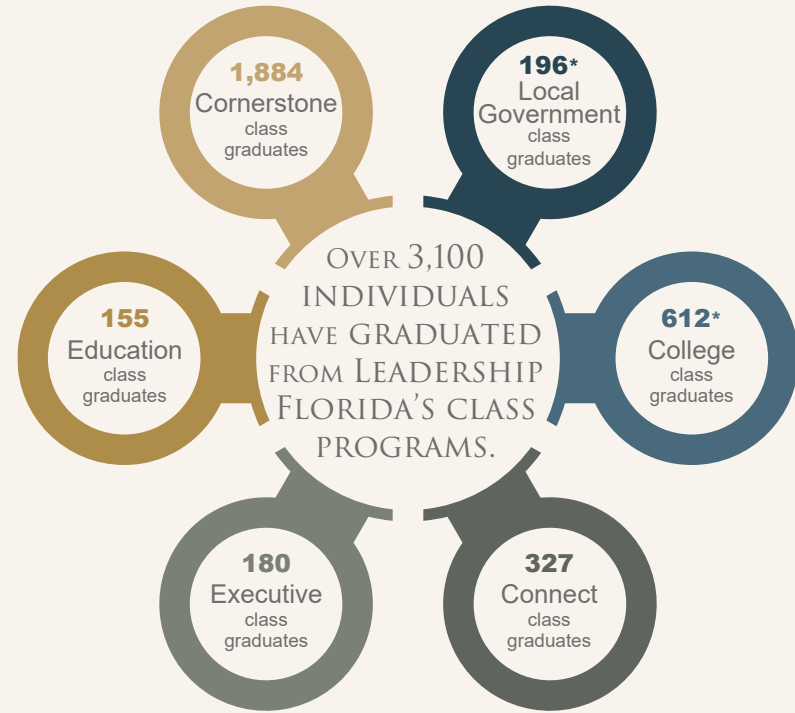
<p>1982</p> <p>The Florida Chamber of Commerce launches Leadership Florida.</p> 	<p>1986</p> <p>Glenda Hood, Cornerstone Class 1, becomes the first female chair; she later becomes Mayor of Orlando, and later Florida's Secretary of State.</p> 	<p>1988</p> <p>Leadership Florida hires its first Executive Director.</p> 	<p>1989</p> <p>Wendy Walker becomes the Executive Director, a position she would hold for 28 years.</p> 	<p>1990</p> <p>Leadership Florida begins tradition of recognizing outstanding service to our state with awards.</p> 	<p>1991</p> <p>In response to a challenge from President Jimmy Carter, Leadership Florida begins its mission to "create a sense of statewide community."</p> 	<p>1993</p> <p>Leadership Florida hires nonprofit leader John Gardner to help the board create a diversity strategy.</p> 	<p>1995</p> <p>Leadership Florida produces the Symposium on Statewide Community for Freshman Legislators.</p> 
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Nearly **20%** of Leadership Florida's active members, **230** individuals, are **Lifetime Members**,



who have **pledged \$6,000 or more** to the **Leadership Florida Endowment Fund**.

Leadership Florida members have **served** in **hundreds** of **political offices** locally, statewide and nationally.



* No longer active programs.

1997

The **College Leadership Florida** program is established.



1999

Leadership Florida partners to produce "**The Florida Formula**," a toolkit to address problems facing Florida communities.



2001

Leadership Florida creates the first ever **Executive Leadership** program.



2002

Leadership Florida launches its "**Faces of Florida**" campaign to raise awareness of prejudice and help to reduce its impact.



2008

Leadership Florida collaborates with NBC News to produce a live **Presidential Primary debate** at Florida Atlantic University.



2009

Connect Florida is established; its Institute Program is modeled after the Cornerstone Class.



2014

The **Leadership Florida Education** program is established.



2017

Leadership Florida selects **Wendy Spencer** as its next **President** and **CEO**.



WHERE ARE WE GOING?

THE FUTURE OF FLORIDA

The Florida Chamber Foundation projects Florida may add as many as five million new residents by 2030 across all regions, with the most significant gains coming in the next few years as the Baby Boomers head to retirement. The demographics for the state will shift as well; by 2030, nearly one out of every four Floridians could be over the age of 65, and today's largest ethnic group, non-Hispanic whites, will account for less than half of all residents – making Florida a “majority minority” state. The state's population and workforce will be increasingly multi-generational, with Millennial and GenZ residents accounting for an increasing share of Florida's leaders.

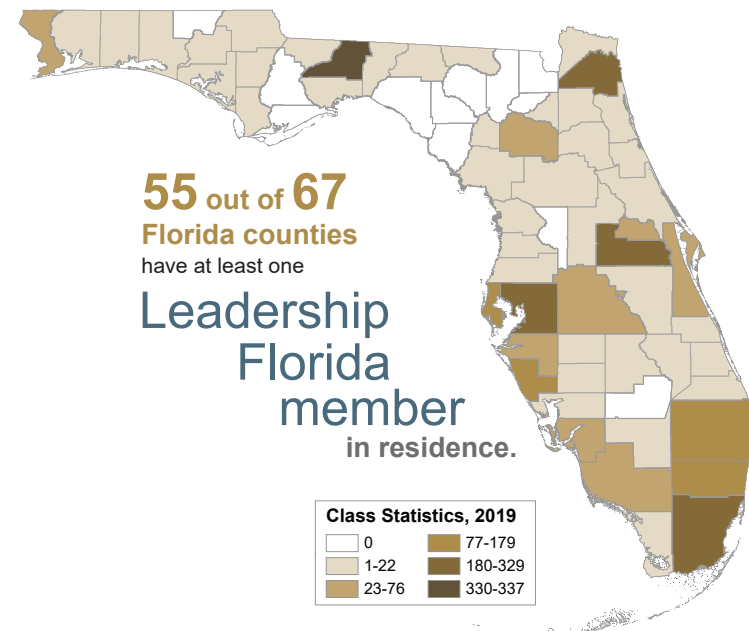
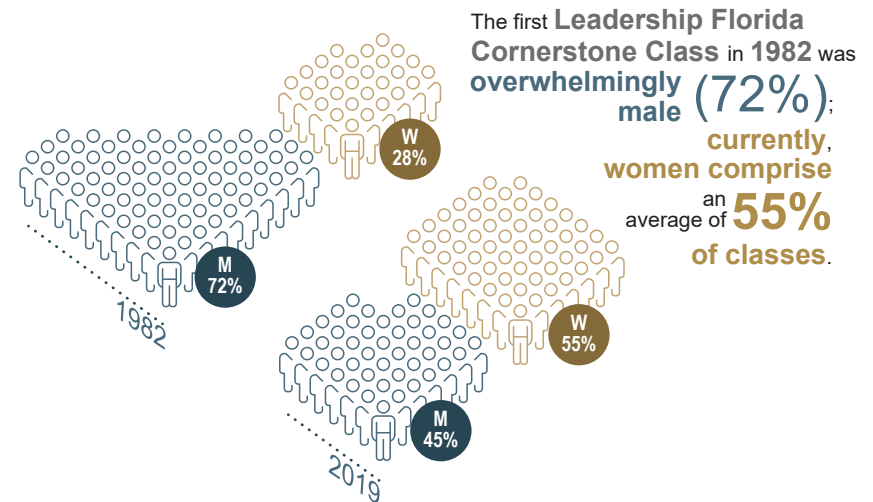
Florida's economy will shift along with the demographics, with emerging industries related to innovation, technology and logistics flourishing along longstanding strengths such as agriculture, construction, tourism, military and financial services. Some estimates suggest more than half of all jobs in 2030 could be in industries or occupations that do not exist today.

As Florida evolves, so will our organization. Leadership Florida will enhance existing strategies and implement new ones to recruit high quality members who closely mirror Florida's increasing diversity, using new recruiting tools to analyze regions and find diverse candidates for classes and programs. By educating and empowering future leaders through Leadership Florida, the state will be prepared for global leadership, economic prosperity and a continued high quality of life.

LEADING THE WAY

Leadership Florida is well positioned for continued success. Membership applications from qualified individuals are at all-time high levels; educational experiences consistently receive positive evaluations; new member events are attracting many participants and sponsors; the organization's financial position is solid; and Leadership Team and member participation is high. Leadership Florida has experienced annual growth of 12 percent in membership. To meet this growing demand for member participation, Leadership Florida must continue to find ways to grow its resource base.

Leadership Florida is a top-performing organization highly valued by its members. By implementing this strategic plan, our members and the organization will be poised to continue enjoying quality Leadership Florida experiences.



STRATEGIC PLAN OVERVIEW

Following appointment of a new Chief Executive Officer in 2017, Leadership Florida's Board approved a strategic planning process. This process obtained input from members through several methods:

- A brief written survey of 85 Leadership Team members at the August 2018 Leadership Team retreat, followed by group discussion.
- An email survey of 1,246 members, which yielded 459 responses.
- Follow-up interviews with 33 members to explore more detailed responses to the survey questions.
- Interviews with nearly all members of the Strategic Planning Committee, an additional key survey group comprised of a blend of representative members, and the Board of Directors.
- A Strategic Planning Committee retreat in November 2018 to review the survey and interview results and develop the draft Strategic Plan.

This strategic plan builds on the top priorities articulated through the surveys and interviews of more than 600 Leadership Florida members. Members were overwhelmingly consistent in their feedback, identifying the relationships formed with other Leadership Florida members and the exceptionally high quality of educational and experiential programming as the two major benefits of the Leadership Florida experience.

The surveys and interviews also highlighted the challenges facing Leadership Florida as its size and range of programs continues to grow. Most respondents said Leadership Florida should focus on quality over quantity when developing programs. Rather than looking to increase membership by creating new programs, members overwhelmingly favored ensuring quality programming during and after the class year. In particular, the unique *"but for"* experiences only Leadership Florida can provide help sustain a high level of member satisfaction.

Another consistent theme from the survey and interview results was the desire to stay engaged with Leadership Florida and "do more." Members want to be proactive and involved in their communities as they are exposed by Leadership Florida to important issues and needs throughout the state.

As Leadership Florida completes four decades of service to its community of members and to the state, the organization must continue to evolve to meet the needs of current members and prepare for the members of the future. This Strategic Plan identifies priorities and desired outcomes to guide Leadership Florida during the next five years. These priorities focus on Leadership Florida's strongest, proven assets – relationships and programming – and provides a path toward growing these assets and through additional opportunities for our members to connect and collaborate.

LEADERSHIP FLORIDA PRIORITY AREAS

- Recruit Committed Members
- Engage and Retain Inspired Members
- Present Quality Programs

87% of members list
"Relationships"
 as a major reason
 they stay involved
 in Leadership Florida.



More
**regional
 activities**

is the **#1 thing**
 members would
 like to see.



PRIORITY #1: RECRUIT COMMITTED MEMBERS

Recruit high quality Floridians who care deeply about Florida's future.

As Florida's demographics shift, Leadership Florida must find new ways to recruit members from a variety of backgrounds and experiences who are likely to become future leaders of the state. To achieve this goal, Leadership Florida will:

- Strengthen existing strategies and develop new ones to continue to recruit high quality members who closely mirror the diversity of Florida.
- Use new technology and tools to analyze areas and improve recruitment of a wide range of candidates for class programs.
- Encourage members in each region to share best practices in effective recruitment.
- Strive to enhance recruitment efforts to ensure a broad range of all types of Floridians participating in Leadership Florida programs each year.
- Renew the emphasis on lifelong engagement in Leadership Florida well beyond the class program year.

DESIRED OUTCOMES

- Leadership Florida will continue to attract and retain members with the highest quality credentials and the potential for significant contributions to Florida, their communities and to the organization.
- Leadership Florida will recruit members who can transition from their class into long-term engagement in the organization and its leadership.
- Leadership Florida will have strengthened its data on potential individuals to recruit as future members, as well as the status of former members whose participation has lapsed.



I found the program relevant, compelling and useful in my role as a CEO and a member of boards and commissions that make important decisions for Florida. My company sponsors this program, and we believe that it is a valuable resource for Florida's top leaders.

Executive Class graduate



PRIORITY #2: ENGAGE AND RETAIN INSPIRED MEMBERS

Educate, engage, and retain members during class and post-class activities who will remain active leaders for Florida.

As Leadership Florida evolves, its continued success will rely on its ability to retain and engage members for long term participation, service, and leadership. To achieve this goal, Leadership Florida will:

- Instill an understanding among members of how the Leadership Florida experience goes well beyond the initial class experience.
- Assess opportunities and develop programming to improve and enhance participation of existing members who are transitioning into different phases of their lives, such as members receiving promotions or considering retirement.
- Provide stimulating educational forums and experiences to inspire and motivate members to consider:
 - » How they can contribute to a better community, region, state and nation.
 - » How they can make a difference in the quality of life for fellow Floridians.
- Implement an improved communication system with members that is organic, intentional and strategic, where members will be connected to the organization and to each other. Use data collection and membership profiles to enhance collaboration and use technology to boost communications regionally and statewide.
- Explore the creation of an interactive database with a member issue/interest area platform to allow members to connect with other members who have shared interests, networks, resources and learning opportunities.
- Regularly use survey and communication tools to collect member feedback and gauge satisfaction where feasible.



Leadership Florida Education has been one of the most rewarding professional experiences I've ever had. I felt that my voice and perspective as an educator was respected, welcomed and appreciated. This program has empowered me to define my voice, thoughts and beliefs on issues impacting student learning in classrooms across our state.

Education Class 4 graduate



DESIRED OUTCOMES

- Leadership Florida will be prepared to integrate its growing membership.
- The Leadership Team will define the strategies with the most positive impact on member engagement and create more opportunities for engagement where appropriate.
- The Leadership Team will monitor and assess the success of new members' integration.
- Members will be well-informed about events, issues and activities in a timely manner.
- Leadership Florida will receive measurable increases to engagement at the region level tied to purposeful activities and participation in "but for" moments and statewide post-class experiences.



PRIORITY #3: PRESENT QUALITY PROGRAMS

Provide quality programs that contribute to lifelong learning and meaningful experiences, while building bonds of friendships and partnerships for life.

Leadership Florida will continue its commitment to high quality programs exceeding members expectations. To achieve this goal, Leadership Florida will take the following actions in its class and post-class programs.

CLASS PROGRAMS

- Continue to execute excellent high-quality programming for Cornerstone, Connect, Education and Executive classes by keeping the programs dynamic, unique, interactive, entertaining and educational – and therefore providing an exceptional experience members cannot have outside of Leadership Florida.
- Develop educational experiences inclusive of all generations.
- Encourage all class presenters to offer resources for members to individually learn more, volunteer, donate or advocate for causes and issues of interest to members.
- Provide provocative programming to stimulate dialogue for Florida-centric issues.
- Provide real-time content on trends and issues on the minds of Floridians.
- Whenever possible, provide dialogue offering information from opposing views so all angles of issues can be explored and discussed.
- Provide a good balance of learning and entertaining experiences to help build lasting bonds of friendship.

Over 2,500 individuals have graduated from Leadership Florida's core class programs.¹

¹ An additional 612 individuals graduated from 17 College Leadership Florida classes and 196 individuals graduated from 10 Local Government Leadership classes. Both of these programs have been discontinued.

CORNERSTONE

Established: 1982
Number of Graduates: 1,884
Audience: Leaders, age 40+



Leaders are chosen annually to participate in a stimulating and thought-provoking educational program consisting of sessions held in cities throughout the state. These sessions include programming on issues critical to Florida, leadership skills assessment and training, and relevant information on Florida's history, demography, diversities, and opportunities.

EXECUTIVE

Established: 2001
Number of Graduates: 180
Audience: New Florida CEOs/Executives



This 36-hour program provides an exclusive and unique opportunity for top executives new to Florida to better understand the state's economic, political and civic dynamics, and to connect with other statewide decision makers. Program content includes Florida demographics, history, trends, statewide economic and budget information, and interactive sessions with Florida's top government leaders.

CONNECT

Established: 2009
Number of Graduates: 327
Audience: Leaders, age 25-39



Leadership Florida Connect is the state's only leadership program that spans industry boundaries and focuses solely on developing Florida's existing and emerging leaders. Each session focuses on key issues and opportunities specific to Florida while intertwining leadership skills and development.

EDUCATION

Established: 2014
Number of Graduates: 155
Audience: Leaders in K-12 education



Each session provides participants with a comprehensive look at K-12 education from international, national and statewide perspectives for the purpose of advancing K-12 outcomes in Florida. Programs focus on educational systems, examination of best practices, schools, classrooms, partnerships and innovation.

“

This program expanded my view of Florida in unanticipated ways; it helped me realize that I'm on a lifelong journey of learning and growing. Leadership Florida provided me and 44 others with a space to share and celebrate this passion, and my experience here will have a lasting impact on my business and political future.

Connect Class 9 graduate

”

POST-CLASS PROGRAMS

- Establish quality programs, platforms, classes and activities for members across the state.
- Engage retired members for unique offerings, including intergenerational programming.
- Develop regional lists of people, places of interest and events. Use this repository of ideas to create “*but for*” Leadership Florida experiences – those adding special components to each activity beyond what members could experience on their own. This database will be shared with region leaders to develop events and activities for members in their regions and across the state.
- Design programming to support and enhance the experiences members value most: learning about new and emerging issues while hearing diverse opinions in a civil discourse platform.
- For regions: include training and technical assistance to pass on institutional knowledge, prepare region leaders, exchange best practices, offer shared and cross-region activities, stimulate new member recruitment and integrate new members into the region network.
- Establish and report on specific region performance measures and outcomes.

- Create pathways for members to connect to post-class experiences.
- Offer and execute one or two “*but for*” trips on an annual (or near annual) schedule for all members. Research member interests for international and national excursions.
- Assess the role Leadership Florida should play in hosting and/or supporting future political debates.
- Consider consistent education for all members regarding civility in discourse in all programs, including post-class programs.

“

This experience offered a second-to-none education about our state in context of the past, present and future. It was both overwhelming and inspiring to consider the challenges and opportunities facing us, but optimism prevailed when surrounded by such motivated, strategic and connected people.

Cornerstone Class 37 graduate

”

DESIRED OUTCOMES

- Leadership Florida will demonstrate measurable evidence of increased engagement over time in stimulating, purposeful activities that result in closer bonds.
- Leadership Florida will enlist and engage more Lifetime Members.
- Leadership Florida will achieve greater member satisfaction as manifested on evaluation survey results.
- Members will be seen as models of positive behavior and infuse that into the public discourse, and practice and exemplify civil, informative and multi-faceted discussions on timely, complex societal topics.

WHAT'S NEXT?

This Strategic Plan will guide Leadership Florida's members and leaders as the organization prepares to begin its fifth decade of service to Florida. This plan provides overall strategic direction to Leadership Florida, with the expectation of identifying specific priorities and actions on an ongoing basis. The Leadership Florida Board of Directors will direct Strategic Plan implementation, including setting priorities and milestones for specific activities and providing accountability for implementation.

To initiate Strategic Plan implementation, Leadership Florida will:

- Maintain a strong and engaged Board of Directors and Leadership Team, and enlist these leaders to develop progressive and creative ideas for motivating members to engage collaboratively.
- Implement a plan over time to match the growth of the organization to sustain quality member engagement.
- Continue to sustain financial support for Leadership Florida through Lifetime Members and long-term partnerships with business, civic and nonprofit organizations.
- Structure Leadership Florida's staff to support growth and engagement with members. Over time, leadership will identify and/or secure funding to hire staff to meet the goals for member recruitment and retention, superior class programming, enhanced resource development and quality activities for members statewide.
- Evaluate the needs and demands for placing and/or assigning staff to support individual region activities and explore the idea of placing future new staff positions to be located in geographically strategic locations.
- Ensure and promote a strong member-centered "customer service" culture and practice where staff supports and serves the membership.
- Continue to communicate the role of Leadership Florida in supporting the statewide community of Florida.
- Monitor progress toward Strategic Plan implementation by establishing and tracking progress toward key indicators and the desired outcomes identified in this document.
- Adjust Strategic Plan implementation as needed over time.



ACKNOWLEDGMENTS

STRATEGIC PLANNING COMMITTEE, 2018-2019

- Mike Freed** (Cornerstone Class 33)
Shareholder, Gunster, Jacksonville, Chair
- Glen Bishop** (Connect Class 8)
President, GBE, Monticello
- Ashley Brown** (Cornerstone Class 31)
President & CEO, Women's Resource Center, Sarasota
- Rena Coughlin** (Honorary Member)
CEO & President, Nonprofit Center of Northeast Florida, Jacksonville
- Al Dotson** (Executive Class 10)
Managing Partner, Bilzin Sumberg, Miami
- Jason Emmett** (Executive Class 10)
President, Duffy's Sports Grill, Lake Worth
- Adriana Ficano** (Connect Class 6)
Associate VP, Broward College, Fort Lauderdale
- Jim Gilmore, Jr.** (Cornerstone Class 29)
Partner, Gilmore Hagan Partners, Jacksonville
- Tony Jenkins** (Cornerstone Class 21)
Market President, Central Florida, Florida Blue, Lake Mary
- Beth Kigel** (Cornerstone Class 29)
Vice President, HNTB Corporation, Palm Beach Gardens
- Felecia King** (Education Class 3)
Educator, Lockhart Elementary Magnet Hillsborough, Valrico
- Michael Munz** (Cornerstone Class 32)
Partner, The Dalton Agency, Jacksonville

- Jennifer Newton** (Connect Class 8)
Director of Consumer Financial Services Compliance,
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- Debra Pace** (Education Class 3)
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- Pam Peters** (Cornerstone Class 24)
Winter Park
- Avis Proctor** (Cornerstone Class 36)
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Tallahassee Community College, Tallahassee
- Pam Rauch** (Cornerstone Class 27)
VP, External Affairs and Economic Development, Florida Power & Light
Company, Juno Beach
- Ryan Reiter** (Connect Class 8)
Director of Government Affairs, Kaufman Lynn Construction, Delray Beach
- Katrina Rolle** (Cornerstone Class 31)
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- Bill Shepherd** (Cornerstone Class 36)
Partner, Holland & Knight, West Palm Beach
- John Streitmatter** (Cornerstone Class 23)
Director, Leadership Research Institute, Palm Harbor
- Mario Trueba** (Cornerstone Class 19)
Regional President South Florida, iBERIABANK, Miami
- Randall Vitale** (Cornerstone Class 32)
President, Hoffman's Chocolates, Fort Lauderdale
- Allen Weiss** (Cornerstone Class 20)
Executive Consultant, Naples
- Wendy Spencer** (Cornerstone Class 24)
President and CEO, Leadership Florida
- Christine Lucas**
Vice President, Operations and Chief of Staff, Leadership Florida



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Vice President, External Affairs and Economic Development,
Florida Power & Light Company, Juno Beach, Chair

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Lawrence Lyman (Connect Class 4)

Vice President, Tactical Electronics Corporation, Winter Park

Carlos Orta (Cornerstone Class 15)

Coral Gables



Michael Stephens (Cornerstone Class 35)

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Marvin Wilmoth (Connect Class 6)

Managing Principal, Generation Development Group, Miami Beach

Mark Wilson (Cornerstone Class 26)

President & CEO, Florida Chamber of Commerce, Tallahassee

Ex-Officio:

David Childs (Cornerstone Class 35)

Shareholder, Hopping Green & Sams, Tallahassee

Wendy Spencer (Cornerstone Class 24)

President and CEO, Leadership Florida

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