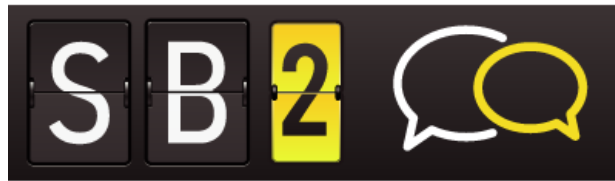


SARASOTA & BRADENTON



Regional Strategy

SB2: Education and Business Partnerships

August 6, 2014; 11:30am-1pm

IMG Academy, 4350 El Conquistador Parkway, Bradenton, FL 34210

[Wes Roberts]

Welcome to the 2014 SRQ SB2 series. This is our second ever gathering of that series here in IMG's beautiful meeting space that they provided to us.

A big thank-you to IMG for making this possible and helping us to expand, a big round of applause. You always clap if you're eating someone's food, right? I mean, that's a requirement. They've been a fantastic partner. Without IMG's support we wouldn't have been able to expand and add the additional locations. So now we're able to be downtown Sarasota and then here in Bradenton, alternating months.

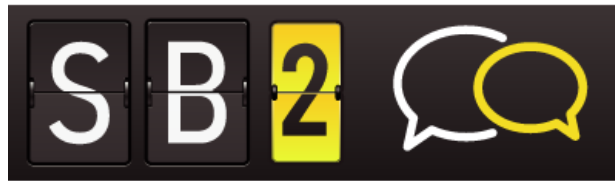
Today's discussion should be very interesting. I have quickly found that being a moderator of these discussions is one of the best parts of my job. This has been an unexpected enjoyment for me. Today's discussion is education, private and public challenges in partnerships with the business community, which is a mouthful and we will chew our way through it as we discuss.

Something that I like to share is the origins of the SRQ SB2 program. Myself and my business partner, Lisl Liang have been engaged and involved with community programs and community events for years and years. One of the things we've seen as a media company, even though our readership spans both counties, a lot of times there are weak partnerships and weak engagement between the leadership in the two counties. One of the small things that we thought we could do is bring leaders from both counties, put them on a panel together, talk to them, have conversations. I don't think we can take 100 percent of the credit for it, but in last three of four years, there has been a sea change in terms of the engagement between the two counties. I have been tremendously satisfied by that and I think it's good for all of our success. IMG is going to talk about sponsorship in just a little bit.

As I said, IMG is a series sponsor. I also want to thank our collaborative sponsor, CS&L CPA's. Please applaud for them. It takes support. It takes funds. It takes engagement. Without both of those organizations, we could not be putting on this valuable program.

In a moment, I will bring out our opening presenter, Jason Puckett who will be able to talk about some of the really exciting stuff that's going on with IMG. However, before we get to that, I want to bring out Jacob Ogles who is *SRQ Magazine's* senior editor. He will mainly let us know how the audience will be involved in our discussion today.

[Jacob Ogles]



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Thank you so much. Again, I am Jacob Ogles, senior editor at SRQ Magazine—
srqmag.com, all our products. Thank you all for coming today. You'll notice there are question cards on each of your desks that have blanks for you guys, if you choose to fill in questions. Towards the end of the panel we will send our staff around to gather those questions. I'll be leading that part of the section where we ask you questions to the panelists and get them to answer as clearly as possible. Thank you very much for coming. I didn't see any elected officials that I rushed by too quickly. Is anybody here? Oh, hey. How are you doing? Pat Zunz from Longboat Key. Thank you. We've had several Longboat Key members at our events and we love seeing you here. Thank you very much for coming.

[Wes Roberts]

Additionally, just thank you to the audience, as well. This is a really quite sizeable gathering for only the second of our Bradenton events. So I think that goes very well. Our Sarasota events took a year and a half, but they're now selling out. We're filling out the space they were in and it's a large space. I think we'll do that even quicker at this rate, which is good. OK. Jason Puckett is the manager of Business Development with IMG performance. I got to introduce him last time. There's a new system today. Where do you want to be? I'll hand you the microphone.

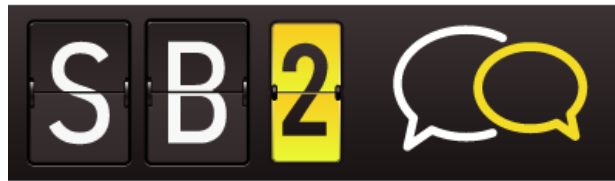
[Jason Puckett]

Good Afternoon. Thank you for coming to IMG Academy Country Club. I wanted to share a bit of information about IMG Academy and who we are. Over the last 5-6 years, we've grown quite significantly and I thought you might want to hear some information about us and where we're going.

Thanks to SB2, people are asking me "Why are you guys involved" and "Why are you guys sponsoring this series?" And really, it's because we are a part of this community and we want business leaders and decision makers like you to know that. We are not just a campus that is sheltered behind these walls that does not interact with the community.

We have 900 plus full time students who not only live here but also their families have bought second homes in this area as well as we have 750 full-time employees throughout the year here, as well. So, what is IMG academy? We first and foremost are an academic institution. We are here to help kids get ready for college but part of our focus is also schools.

We have a great success rate with our kids and we help them get ready on and off the field. We have a 98% rate of students that will get an academic scholarship and the reason there is a 2% loss there is that the other 2% go professional. The mass majority are getting ready to go to college. It's a wide range of division one and division three schools and really just helping them take that next step in life. So, it's exciting for us we just completed last year a brand new stadium that houses our sports, but also State Championship events.



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We'll be hosting a NCAA division II Track and Field championships in 2016. We also hosted major league soccer spring training here. We have a field house now that can not only accommodate our sports but groups that may want to use our conference room facilities.

We'll have SB2 there next year. We're adding to our resident's hall, so our students have a place that they can stay and we can expand our student base as well as a new academic center and sports performance building. So, really we wouldn't be able to do all of the things you see in the picture here without the support of local, state, regional funding. That's really helped us grow and we're very thankful for that.

But, really just wanted to share with you on the education side that we are about helping our students get to college and we have a fantastic team on our academic side, we were not just all about sports and we are apart of this community. Thank you, Wes.

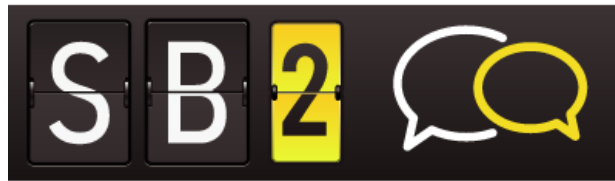
[Wes Roberts]

Thank you, Jason. Our panel has some tremendous community leaders on it. I think the more you hear their voices, the less you hear my voice, the more we're going to learn. So, rather than me introducing each one individually, what I'd like to do is allow each of our guests to tell a little bit about themselves in just a couple of sentences, the bare bones of their history and current position. And I always add in a question that I would like each person to answer that tells us a little about who they are as a person. Maybe, each person could share a little about who they are, a brief anecdote given today's discussion, a teacher, a mentor, or a teaching moment that inspired you and had a big influence on the path that you found yourself on. I'll hand the microphone to Allen and start with you.

[Allen Carlson]

Thank you. It's a pleasure to be here and thank you all for coming. A little bit about my company and myself—I'm Allen Carlson of Sun Hydraulics. We have 750 employees here in the Sarasota-Bradenton area and another couple hundred around the world, so about one thousand worldwide. Half of what we produce here locally gets exported to some other place—places like Korea, China, Germany, Scandinavian countries, England, South Africa, Australia, New Zealand. If you went into our shipping area, you'd find about 50 international locations. So, we are a net exporter of products. We actually import very little. Our business is an engineering company, so we design and manufacture hydraulic components that can be used in equipment around the world. We are a public company. We were founded in 1970. The founder is Bob Koski. Bob has passed but his wife; Bev is still in the area. They started it by themselves in 1970 and it has grown to about a 210 million dollar company within the national locations.

My background is in engineering. I'm not from Sarasota. I grew up in Wisconsin on a small dairy farm. From there, I went to engineering school. I worked in the Southern Wisconsin area for about ten years, moved to Ann Arbor, Michigan, working in Ann Arbor for another ten years. From Ann Arbor, the company I was with relocated us to an



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international destination, which they considered at that time to be Arkansas, kind of a third world assignment, if you would. I spent ten years in Arkansas; very successful with that operation and the reward for being successful was a trip back to headquarters, which was Michigan. I opted to come to Florida to find a new job. I've been here about 18 years and really enjoy the area. A little about the education thing. I guess, thinking back on my life, there were a number of people who were instrumental in taking ownership of me. But probably the number one was my high school algebra teacher. I really didn't get algebra. And he actually took an interest in me and began tutoring me, after hours, in hours, whatever it took to get me through algebra. One day, probably half way through me algebra year, it finally clicked and I got it. And I'm actually pretty good at algebra these days. It was his efforts, back when I was a junior or a senior in high school.

[Mary Glass]

Good afternoon. I'm Mary Glass, the executive director of the Manatee Education Foundation. The foundation was founded in 1988. Marge Kinnan, who was an educator and a school board member, founded it when they had some seed money from some people in the community. And they didn't know what do with it, so they started the Education Foundation. I am pleased to have three of my board members here today too, so I'm glad to see that—our chairman Ross Hodges. But also, I wanted to say that the exciting thing is that it was a change in career for me about seven years ago. I had worked more in the corporate side of business and really did more in the real estate area. When I joined the foundation, the thing that was exciting was to see the changes that would take place in the classroom.

If I could just add, that was the big thing for me, the faces of the children. Blanche Daughtrey Elementary School when we gave them the STEM lab materials and we walked in with a camera because we wanted to document some of it. And by the time we had the materials in there with their boxes, and they were sitting in teams, the camera started rolling and they didn't even notice anything. They just went to work. And to see what they produced and how they were able to lay it out like little engineers was really fascinating. So for me, the education, the things I've seen since I've been on the job. I did have a geometry teacher that taught me a lot and I think it helped with the creative end of things and was always pleased that I was able to take classes at the Ringling Museum on Saturdays. So those were the moments that I think really helped me because I grew up in Sarasota. I went to Saint Martha's from kindergarten through 8th grade. I've seen the community change. It has changed for the better and I'm excited about where we're going.

[Susan Scott]

Thank you. I'm Susan Scott and I'm from Mary's sister organization, the Education Foundation of Sarasota County. We were also founded in 1988 and actually the Education Foundations in Florida, there's 67 of them and they were created by the state legislator to be connected to all of the school districts. So there are 67, almost 67, some of the smaller counties don't have one. Our job and our mission is to help every child reach



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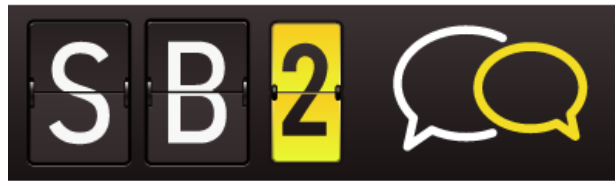
their potential and we support them in ways that the school district isn't able to, either from funding or from outside their mission. For example, we provide computers and technology for kids outside of school that can't afford it. We do a science fair. We do a lot of professional development, so our teachers can be the best possible teachers for our kids. So I, like Mary, was in the private sector for years. I'm a banker, a recovering banker by trade. I decided to end my career, my 43-year career in the business world with something that's really near and dear to me and that's education. Education is everything to a child. To be able to, raise them selves out of poverty or to reach their potential and become a doctor with a PhD.

This is really what excited me about this opportunity. I have to say one more thing—that this community. I have been in Sarasota and Manatee communities for 26 years. I see Ray Dow in here. I can't see because of the windows, but—Ray, are you the third woman chair of the Manatee Chamber of Commerce? I was the first woman chair of Manatee Chamber of Commerce, which is very exciting. And I've also led the economic development corporation in Sarasota County, years ago. We recognized that the community with great school system is such an economic benefit for the employers in our community. I think the employers recognized that. We've been very fortunate to have—I'll just point out Mr. Carlson has been on our board. He mentioned Bev Koski. She was a teacher at one point and time and was also on our board. So the business community has been so supportive of education. I don't know what else to say except thank you all for being here and taking an interest in this. I see somebody from Willow Smith over here and Willow Smith has always had someone on our board and we're very grateful. My inspirations have been many teachers. I was fortunate. I had nuns as teachers and I went to an all-girls school and there were no excuses. It was a geometry class, an algebra class, there was no distinction. Males were meant to exceed in this subject and little girls don't have to worry about it. These nuns, they held our feet to the fire. Every one of them, whether it was my English teacher—I'll say that I had an algebra teacher and geometry teacher that did the same thing. Teachers have always been my inspiration.

[Jan Pullen]

Hi, I'm Jan Pullen and I'm really happy to be here and that you all are here as we have this discussion about education and business. I am the head of school at Saint Stephen's Episcopal School and I've been there for 27 years as an administrator, the last 12 as the head of school overseeing all the operations of a school that has about 680 students from pre-12th grade. Also, part of that number is we host the US U17 soccer team. So that's an interesting aspect of who we are. Education, when I think back—we're so fortunate in Sarasota and Manatee County to have choices and I'm representing the private schools as Saint Stevens is an independent school and as you hear about IMG, there are so many choices with public schools, charter schools, Christian-based schools, parochial schools, and even the home schools and online schools.

We're very fortunate that there are choices for parents because there isn't always one place that can meet the needs of the children. Saint Stephen's was founded in 1970. We are an Episcopal school, welcoming all faiths, so we have an aspect of the spiritual that's



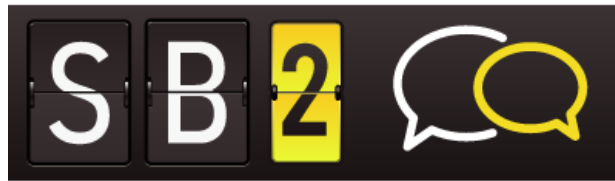
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a part of who we are. We have a good number of those in other religions and we welcome them to the school. We place at 100% of our kids going to college every year—that really is our mission. A really well rounded education is what it’s all about. I look back and my whole life has been going to school. Whether I was three years of age, a young child going to preschool...I’ve actually been on the school schedule my whole life. I’m gearing up, the kids are back on the 18th. It’s interesting, I just finished my doctorate at the University of Pennsylvania in May of last year. So, know nothing but education. There have been many educators throughout my life that have influenced who I am. I will tell you the thing that probably most influences the way I am now is the children, because we have wonderful children in our world. To see them be inspired by those and then connected to get back out in the world. It’s interesting how this discussion today really has so much meaning because it’s a cycle. You educate them because they can go out and get jobs and come back. I’m just happy to be a part of that. I love what I do and have done it for a long time.

[Jeff Hazelton]

Hi, I’m Jeff Hazelton. I’ve got a career in healthcare technology that I’ve had for about 15 years. I’m a part of a company called BioLucid. We’re in a hub downtown Sarasota. What we do is, we create applications for iPad and mobile platforms that are used worldwide for physicians to help them explain things more visually to their patients. We’re a bit of a blend of the digital health and digital arts field. We’ve hired about 20 Ringling graduates since we begun. We’ve got about 35 employees and we spend our time in that world, trying to create digital art that helps communicate. It’s a relatively new field. My own personal background is “premed gone bad.” I began my career trying to go to medical school and actually became an artist along the path. It was something that I had to pull back later in my career. It’s interesting to be an artist and to have spent the majority of my career in health care technology.

We’re now creating applications that are being used in about 30 different countries. We’re producing them here in Sarasota. From an educational standpoint, I’ve gotten involved locally trying to help educate about what we need as employers here in technology for us to have viable technology companies that can compete and produce these sorts of applications that are now being used in many different ways. If I had to say I had a mentor along the way—in college, I had a premed advisor, Dr. Barbra Stoll. She was instrumental in discouraging me about continuing along my path to go to medical school because I was in one of the school plays in college and I decided to try acting in the play *Grease*. She said that when she saw me dancing up on the car in *Grease Lightning*, she said “You should be an artist, not a doctor.” I guess I can credit her. I turned out alright. So, we’re doing new and interesting things and I’m here to help the community understand what I feel or what we feel is important to be teaching, so we can have these sorts of jobs here in Sarasota and Manatee county to drive the future of this exciting new field that is exponentially growing every year. I’m here to provide that support if I can. We also have been involved in the Gulf Coast Community Foundation. We were honored to be the recipient of the STEM Smart Innovation Award. That’s sort of what pulled me into this whole world, talking to the middle school teachers about this



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exciting, new way of educating students. Also, I've been an instructor at Ringling College of Art and Design in the department of motion design, teaching animation and iPad development for classrooms.

[Wes Roberts]

Hang on to the microphone. You talked about the STEM Smart Initiative that I know BioLucid is very engaged with. One of our concerns as a discussion process is how the engagement between business and education helps the community, our economy, and our quality of life. Is there a valid self-interest that's there? I think that it's a good thing in helping bring STEM education and the kind of learning that that reflects to a local community, in terms of your hire.

[Jeff Hazelton]

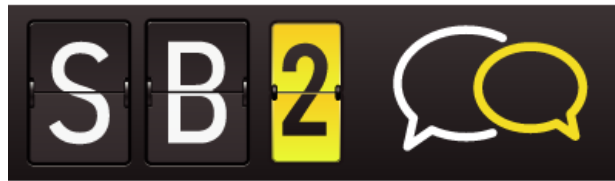
Absolutely. It's a win-win. We are looking to hire local graduates and keep talented students that graduate from our colleges, and even from the high schools, here. I think it absolutely helps the companies that are here trying to do these sorts of things. We're on that cutting edge of industry, which is rapidly changing all the time. These students that are graduating, they're going to join that world and it's going to be rapidly changing on them. So, they need to learn in a way that mimics that and that they're always on their toes and looking at the next thing. Certainly it helps companies if we can have that sort of resource here and even bring our technology into the classroom. We talked about that quite a bit. This is a very visual way to learn about anatomy, disease, and physiology. This is stuff that, if students see it in a way that's engaging, will help them understand it better and maybe strike a passion within them to go on and study in that field.

[Wes Roberts]

I'll continue that with Allen. First of all, how many people does the company employ? Maybe you mentioned it earlier. And then, are you able to hire locally? Do you have to additionally educate people when you hire locally? Do you seek from outside the area? How does that work for you?

[Allen Carlson]

We have about 750 employees locally and another couple hundred throughout the world. We create about one hundred new jobs per year. That's through attrition. 800 new employees. If you have normal attrition, you're looking at about 50-75 employees per year that you need to replace because they're retiring or moving onto some other job. Additionally, as a growing company, we need to hire more employees because we're growing. All in all, we're hiring about 100 employees per year. Where do we get them from and where do they go? Well, I would say the majority of them are local people but not always. We hire from engineering schools like Michigan, Dartmouth, Georgia Tech, Florida, Florida State, USF, UCF. That's where we get our "technical talent," if you would. I mentioned some local schools and some of those are local kids that went off to school and are coming back. Some of them are from Wisconsin or wherever. Some of



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them are from outside the US. We have three new employees right now—two of them are from China and one is from South Korea. They will go back to China and South Korea after they spent sort of an internship at headquarters. So that's kind of the background. Our motivation is to be able to hire people who want to be here and people who want to be here are likely to be long-term employees with the company. And generally speaking, if they're from the area, we have a much better chance of hiring good, long-term employees with the company.

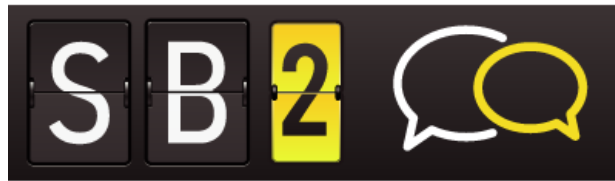
So, we want to create a pipeline, and it's beginning to work. We began ten years ago trying to create this pipeline of talent. And it may not just be engineering students, it may be people on our faculty that are doing technical jobs, programming robots and doing things that are factors. It's a full gambit of entry-level positions to PhDs, engineers, and everything in between. What we find works for us is, we do not hire skills. We hire for the attributes the employee has. Do they get to work on time? What is their attitude? Those are much, much bigger factors in success than skills. So, you hear this thing about skills gap. There probably is a thing as skills gap but that's not the issue. Skills gap is a small piece of the equation. What we struggle with is finding employees with good attitudes. That's what we focus on and the skills come very easily. There are lots of courses in the area where they can pick up skills like welding, wood shop, blueprint reading, mathematics or whatever. For us, it's all about hiring attributes and not skills.

[Wes Roberts]

Now maybe hand it to Mary. When I talked to a parent of a one year old and a four year old and when I talked to other parents and certainly when I talked to other business people, a lot of my clients are entrepreneurs. I feel like I hear the same things all the time. I want there to be local opportunities where eventually, my kids can work and have a career. I hear that as a constant goal all the way up and down. Is that in any way on the agenda of the foundation? Are you “destination agnostic?” The more I thought about that, is that even a reasonable goal?

[Mary Glass]

Well Wes, you know the Manatee Education Foundation really wants to align with the district goals and some of those are career readiness, which is a big thing. So we align with partners. I mean, it just fits beautifully into our discussion today about where do you find partners? And that's kind of tricky sometimes because this school district has needs. It might be STEM labs right now or field trips or things like that but they don't have the funding to be able to do that. We know where some of the weaknesses are and where that funding needs to take place. So our focus is very much that—that's our sole mission, to support the school district with innovative programs and different opportunities. It's been fascinating lately because we get the technology students associations that we help fund that do things like build drones and we help them with different projects that they need, highly STEM related. Out of the two-hundred-something grants that we're funding next week, probably 75 percent of them are STEM related or literacy. I think that that



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partnership is so important with our foundation aligning with the district, aligning with the community to help fund these things so our children do have the best education.

[Wes Roberts]

Is that, sort of— this may be my first challenging question, I hope. When you're adding those kinds of opportunities for kids in the educational process, is that in some way acknowledging that a standard could be better? Like, is that inherently a criticism of the baseline?

[Mary Glass]

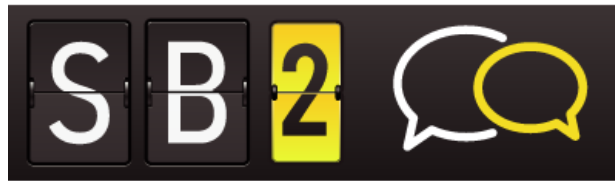
Well, we definitely know that we can do better. The baseline needs to be improved and one adjunct thing that's very large that we got involved with is the Annie E. Casey Grade-Level Reading. You know, we find that if students, by third grade, if they're not at that third grade level reading, the gap keeps on increasing and increasing. The community is coming together, I know in Sarasota and Manatee County, to work together because there are health issues and as Allen said, they addressed attendance and summer learning—things of that nature. So our community has a lot of work to do but I feel confident that we're finding ways to come together and we just need to communicate to a lot of the businesses what some of those needs are and how you can get involved with that.

[Wes Roberts]

I'll follow that up and continue that line of thought with Susan and say, what are the limits of the influence of the foundation? How can you move things forward when you see that they could be better? And this may be too big a can of worms, but what are some of the big players? As an outsider you hear about the foundation, you hear about federal, state, regulatory committees making decisions about education, you hear about the teacher's union influencing education. What's the balancing act as far as you all are engaged in?

[Susan Scott]

For us, we are a partner with the district. Our goals are to support what the school district's goals are. And as you know, a lot of times what the school district has to do and what the standards are come from the state legislature. I'll use the common course standards, for example. Our school district is adamant about implementing the common course standards with highly professional teachers who know how to teach. When you talk about raising the bar, I'm kind of agnostic whether common course standards are a good thing or a bad thing, but if you understand them, they raise the bar tremendously for our kids. I've seen the problems for a fifth grader, the standards for a fifth grader, and I could not begin to answer the questions and the critical thinking and the problem solving and the attributes that a child needs and the persistence and creativity and innovation that goes into that. So, we are in a position to be able to support the goals of the district. The big players in our community, the common course standards right now are college and



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career readiness. That is our mantra right now, to help our kids understand what the opportunities are for them after high school. And to help them become motivated, to have college and career aspirations.

If they're academically prepared with the common course standard as a baseline and they have the 21st century skills like critical thinking, problem solving, creativity skills, they're prepared to go into the world of work, to go into post secondary education after school. So, we're in that place that we support the school district with things they can't provide for the kids because they either don't have all the funding that they need or we help them accelerate it. One of our big players is the Helios Education Foundation, **which** is the product of a student loan company. They were not-for-profit so they created a 600 million dollar foundation. They fund Florida and Arizona. We just received a half a million-dollar grant from them to accelerate our teachers' expertise and a new way of teaching our kids. So it's not like where the standard is depth of knowledge. One level of depth of knowledge is they can repeat to you the definition of say, kinetic energy. The next level is they can describe to you what that means. The third level of depth of knowledge is, and this is where our business community comes in, to actually do a demonstration of kinetic energy. And I'll say this: Mr. Carlson's company has funded Project Lead the Way, an engineering program at Riverview High School. Those kids are getting a hands-on, real life job opportunity to see what the world is really like in that particular job. The depth of knowledge then, they become high-level learners at that depth of knowledge level.

[Wes Roberts]

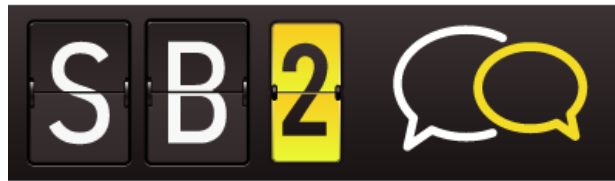
On a topic like this, we're going into detail on common core. I guess a structural question is, is the foundation able to advise? You, as the head of the foundation. This is such a politicized issue right now. If there was some curriculum approach you personally or your board felt was ineffective, then is the foundation in a position to say something?

[Susan Scott]

We definitely are. With that partnership with the district, and I've been working with our middle schools in this particular program. I've been working with the middle schools and the director and have said, "What if we did this?" "What if we kind of looked at it differently than the bureaucratic way that things are being delivered to the kids?" Also, our board being members of the business community, is able to push back on some things that the district wants to do that we don't think is going to be very effective in terms of developing college and career readiness for our kids. So our board has a very good relationship with the administration and the district.

[Wes Roberts]

Let me ask a question to Jan. In your bio it talks about 27 years with Saint Stephen's, which is tremendous. That's a duration over which you'd see a lot of change in education and the education process and you've been directly involved with it. For our conversation



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today and because Saint Stephen's is a private school, you may wish to answer both public and private. Are you seeing kids graduate school better prepared for the business world today than 25 years ago? Or the reverse, are they less prepared?

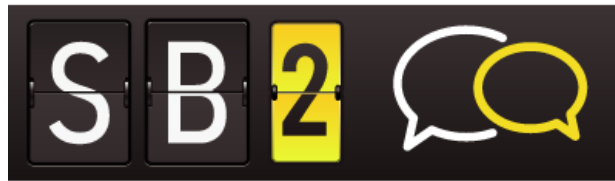
[Jan Pullen]

I will say that teaching and learning has definitely changed. With technology, technology is not going away. And we've had to incorporate how to teach with that. I know when I went to school, it was very much read, write and regurgitate. That's really not how it is. I think it's shifted and teachers are more like facilitators and so the answers are very much at kids' fingertips and it's a matter of how to get them thinking, analyzing and understanding creativity. There's no one answer and there are many ways to solve problems. And I think it's just different, to answer your question. They're differently prepared and I think what we're all trying to achieve. I know at Saint Stephen's specifically is that well-rounded child because you want them to be able to think on their feet. You want them to be able to take a problem or a project and work it through from beginning to end and not just answer the question.

We were talking before we got going today and so much of what kids are having to learn today is how failure such a huge part of learning. I think that's different in this world. Those attributes that Al was talking about come into play because they understand not only the concepts and skills that come into play but also understand some of the feelings that go along with having success or not having success in the classroom. I think kids are more open, things are so much faster, things are hitting them mostly because of the technology. The education system has to keep up with that and make sure that things are innovative for them. One of the things we and many of the schools do is we have them go home and look at a video on their iPads and then come back to discuss it, rather than just discuss it in class. Because that allows kids to think on a wider range of their own feelings or being totally influenced by their peers. They come having formed their own opinions on things. I think that has helped us with moving education and preparing them. There are many answers to the problems and I think that would help with the business world. I know we connect with the business world in many ways, I was talking to Jeff, we have people come in and have them demonstrate the application of what's happening in the world so they see what we're teaching them really makes sense. Kids in this generation are really wanting that. They want to know, how does this work or fit in? In our economics class, we have a lot of speakers come in and share what they're doing. Their questions are good and I think kids are more free to ask questions than they used to be. I think it's getting better and better, personally. I'm very intrigued and motivated that kids are wanting to learn.

[Wes Roberts]

Jeff has been apart of the process of bringing the STEM program into schools and I've kind of been on the forefront of that or engaged in it. It sounds like we can go up and down the row and everyone will say problem solving is great and kids feeling inspired is great. I think we're all going to know that those things are great but did you find



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resistance? Or maybe you were talking to the past teachers, as we kind of hear earlier. What sort of resistance did you find when you were coming in as the business advisor?

[Jeff Hazelton]

I think that it's not really resistance. It's just education. What are the things that employers need? It sounds like Saint Stephen's is ahead of the curve from what I hear. I'm still getting familiar with what's out there. So when you talk about the core and what students are expected to know, there's a big movement around computing in the core. My main resistance or what I find is not well understood is, what are the facets of technology that are growing exponentially versus the ones that are not. So with IT in particular, that is something that everybody seems to understand. It's being taught in colleges but when it comes to computer science, it's not being taught or addressed in a way that, when we come through as employers and say that we need a programmer, we're not finding the candidates that we would hope for. I think there's always going to be that need of getting computing in the classroom early.

When we had the class at Ringling we gave iPads to the students to borrow. They see this technology; they're very familiar with the consumption of it. They use applications all the time. They probably would just as well do their work in PowerPoint. Even in elementary school—put away the construction paper and give me PowerPoint. It's amazing to see how children take this technology. If they don't learn to wield this power of being able to create something as opposed to say just play a video game instead of learning what makes it function and learning those core competencies. I know if computing is in the core yet. I don't think it is but it really needs to be. Every student that's being educated now should learn to write code or at least understand the process of it because it's not going to go away. It's everywhere and it's just going to continue. Other countries out there have understood this and are ahead of us in that respect.

[Wes Roberts]

I'd like to take the microphone again. I'm like a typewriter. One of the things we've heard again and again as we've gone around the table is prioritizing and valuing—for the foundations, for private school. Even IMG is talking about their students going to college. The implication is 100 percent college attendance is the success we need to achieve. As an employer with a broad range of employees, one question is, what percentage of your staff needs a college education? Can you speak to that? It feels a miss to me. It feels like that's not a 100% appropriate goal.

[Allen Carlson]

Sure, that's a common misconception that everyone needs to go to college and everyone needs to get a degree. In reality, people need to come out of schools with the capability to go on with their education. Life-long learning is good but it might not take place in the next four years. It may take place over the next 40 years. Our workforce for example, we have 800 employees, and probably of the 800 employees, if 100 of them have a four year



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degree, that means there are 700 people who have some form of education post high school. Maybe they've taken some classes along the way, maybe it's been one-the-job-training, who knows? So, it's a misconception. The world is full of college-degreed people who don't have a job and can't contribute to society.

Whether they're archeologists or lawyers or whatever, there are a lot of people out there that have advanced degrees and can't be productive or find a job. I'd like to just touch base on the last question if I could. The question you asked is are students better prepared today than in the past? I think you answered it very well from your respective. But I think if you answered it from looking across the board. If you look at Saint Stephen's or a school in Arcadia or you pick a school somewhere across the United States, I'd say the answer is both yes and no but it's generally not. I think the reason for that has to do less with education and more with talent. Any product that you make, the product is the function of the raw ingredients that you put into it and the processing of those raw ingredients. Education is a piece of the processing of those ingredients. Question whether the ingredients today are as good as they were 20 years ago. I think that the gap between the best students and the worst students is widened.

[Wes Roberts]

When you say ingredients, I presume you're not saying that the human genetic code is worsening. Are you pointing your finger at parents or where is the ingredient point coming in?

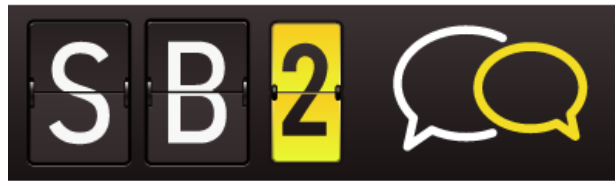
[Allen Carlson]

That's a great question and I don't know the answer. But I can say on average, little Johnny who is starting first grade today is not as prepared as little Johnny who was starting first grade 20 years ago. That's what I was observing.

[Wes Roberts]

There was a transition. I love being the moderator and asking questions that are other people's problem to deal with. I'll give it over to Mary. So, it maybe speaks to that. If you go back 100 years, I choose the number kind of arbitrarily but school and education was something that the average young person got when they were not working. They were working, if they were agrarian especially, they were working on the farm and witness our summer breaks and it was part of what happened. If the crops needed to be plowed, nobody went to school, they went and rode a tractor or stood behind an animal. So now we've transitioned and now it's kind of the point of this conversation and we're saying that education needs a bit of work and a little business connected to it. Have we gone too far? Should the foundation open work camps for kids? That doesn't seem good. What does that tell us? We've gone 100% the other way and how do we even get a student to see a business person? Whereas the other direction would have been kids who got to see a teacher were lucky.

[Wes Roberts]



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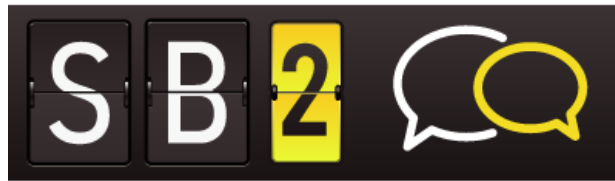
There are so many answers to that question but the one thing that comes to mind is the gap that we talk about. It's so huge. 66% of all students, that gap between kindergarten and third grade. If they don't catch up, they're left behind and that's it. So if they're not at grade level reading by third grade, then the gap just gets larger and larger. Do I think things are worse? They could be. In that, socioeconomically in Sarasota and Manatee County, I've seen the stats change in the percentages. We have a lot of schools that are 80-90% free and reduced lunch. Then we have our A-schools, our B-schools. We're a little different than Sarasota.

My thought is that we do need to look to other countries to improve because the one thing that I've noticed in the seven years that I've been on the foundation is that the Department of Education always seems to be playing catch-up. It's confusing when you're saying the common core, now it's Florida State standards, now it's this. There is a lot for our teachers to manage when they start school on the 18th. They're thrown a lot of things with the technology that they're faced with and the funding shortfalls too. So I agree that the children do need to be better educated in the technology area but I do know that in Manatee County, it's being able to fulfill those needs and have the proper technology in the classrooms. That's the other issue that we're faced with too. That's what it is, playing catch-up because things are moving so quickly that I think for our students, it's also a disadvantage.

[Susan Scott]

I think that things are very different now than when we were in an agrarian society and the skills required to get a job were very different than they were today. Today, for a person to get a job, it requires some sort of technical skill. When we talk about, we talk about everything from 4-year to 2-year, to technical school. That's college, post secondary education. I remember Levitra, a woman from the general electric foundation. I'm from Louisville Kentucky and GE has a big headquarters there. She talked about we'll have a job opening for skilled workers and we'll get 5 applications. We'll have a job opening for an unskilled worker and we'll get 150-500 applications for that position. I think the difference is the level of skill and the technical skills that are required for our job marked today.

A quick example of how we're working with companies that have job openings and they need technical skills. We've been brokering a partnership with SCTI and this particular company is a national company with hundreds of job openings that require this particular skill. So SCTI, they're going to fund a program to get kids trained here for these jobs and they hope to replicate. They'll sponsor the kids. They have everything from scholarships to attendance programs to internships to apprenticeships. They're even going to offer relocation packages to these kids. This is a very meaningful partnership that we have right here in this community. There are the jobs here for these skills. That's the key to it. For us we can train our kids and get them ready for college and careers and technical. But if there aren't jobs in our community, we're just barking up the wrong tree. And that's why I think it's very important like Sun Hydraulics or I'll use PGT or Tervis Tumbler for example. We know what their needs are.



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We're training our kids in our technical institutes as well as the higher degrees, so they can come back here and raise their kids. That's one of the things for me. Both of my children are here working in the community. We've come a long way and I think a lot of things have changed but the levels of what we expect from our kids are very different now than they were years ago.

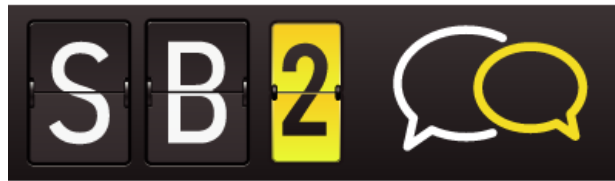
[Wes Roberts]

I'll hand the microphone to Jan. If you have something to say, let me ask the question and tack your answer on the question if you'd like. Coincidentally, two days ago I was interviewing a psychiatrist, a world-renowned author who has written a dozen books, sold millions of copies. Dr. Edward Hallowell, he's coming to town for a free black shirt and we're cosponsoring with Forty Carrots. They bring a different speaker every time. His book is *The Childhood Roots of Adult Happiness*. It was sort of a heavy conversation with him to be honest because the conversation really delved into—are we setting our kids up to be happy? Are we prioritizing that and not just success? He was really criticizing public schools, but that doesn't mean that private schools aren't the same way. He said what's happening in public schools is a travesty.

The public school system is about numbers and memorizing, a memorize- and-forget curriculum. Kids ought to be taught through Socratic learning, learn by doing. These things are deadening. Homework turns kids off. There should be no homework. Now, this is one person's opinion. He's also a multimillion-book writer with who knows how many locations all over the place. It certainly has influenced his opinion. Are we setting our kids up to be happy with our processes, our entire higher educational approach?

[Jan Pullen] Again, having been 27 years at Saint Stephen's and I was raised in the public schools but my experience has been in independent schools. In contrast it's just a different world where we are. We do admission testing. We take those in the 78th percentile and above academically. So the world I work with and who my teachers work with and who's sitting at our seats is definitely different than who's sitting in the public school seats. It's just a different approach. We are a school that—I totally agree with Al that not everyone has to have a college degree. At Saint Stephen's that is the mission of our school, to have kids be prepared for college and go into jobs after college. It's just different in the context of what we're working with. When you look at if kids are happy and what we are teaching them. Again, I come from the idea that this generation learns differently. Their world is fast-paced. Everything has been handed to them in a different way and one thing we have not spent a lot of time talking about is not only how the kids are learning but also how teachers have to teach them. I think the teachers' jobs as facilitators, is to facilitate in many different ways. They not only have to have the knowledge base themselves and understanding, and with the public schools, the whole common core and know what the government is saying.

We actually have some freedom at Saint Stephen's to have teachers be professors in their classroom and work to know what they are teaching is to impact those who are sitting in their seats. And again, you hear about programs in school that they're not only teaching



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the curriculum but they have to do things with safety and bullying. So when you ask about happiness, I think a lot of it is we've got to make sure we're teaching our teachers what the range is so the child is looked at and not just looked at academically. But are they looked at in the whole? I know at Saint Stephen's—my doctorate degree that I just got a few years ago, my whole dissertation was on emotional intelligence. We spent an awful amount of time talking about that.

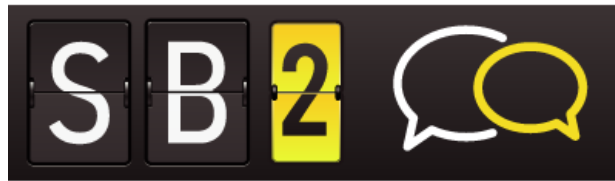
If any of you have done much reading or research about emotional intelligence, a lot of businesses are even looking at that and the fact that you want to be able to have a knowledgeable employee that understands themselves, how they're going to relate to people. Are they a happy worker or are they just a dreadful worker? I see the same thing with kids. Again, in this fast-paced world that we live in. Things are just changing so rapidly that we have to put some attention to that. We have to make sure that we are looking at emotional intelligence. We have a whole emotional intelligence initiative that we're trying to work with the kids with their own understanding of themselves and the others in the world. I think that helps with the happiness piece because you can work really hard at something, you can fail at something as you're trying to help them understand. But how does that equate out to where they feel it's successful or that they feel worthy? I think you teachers have looked at that whole balance in kids because there's a lot to juggle with that.

[Wes Roberts]

It's hard for me to phrase this question exactly, but when I asked that question about mentors, I thought about mentors in my own life and especially the education process. My mentors perhaps like Jeff and his own story, were people who made my life hard. My mentors weren't cuddly and they weren't easy. They made my life quite difficult in various ways. And from each of the touchstones, I've made a list of five or six. Those would be points I grew from, people I remember now decades later. A lot of other people who made life easy I don't remember as clearly. Is that part of how engaging businesses in the education process can benefit the education process by bringing in judgment that comes from, the sort of strict judgment when you're a business owner people have to produce or they can't be part of the team. That's not the way a school works.

[Jan Pullen]

As I was thinking of this panel, there were so many different ways when I look at our school where we have people come in and speak. Whether we have field trips or whether the kids go out into the community, doing community service. I think any time you can have the kids understand where this leads to, and then also we've had several panels of our alum who have come back, who have jobs. We've had people from the community come back and a variety of jobs that are saying to kids, "know how to talk on the phone," "know how to start a project and end a project," "be open." About 86% of our kids play sports, so they understand the team approach. You've got to be a team player. I just think that is one of the great things within a community. The more businesses and education can work together, that's the model for the kids to understand where happiness can come



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from, as well as success because they know what people are looking for. They also know what they have to do to get there.

[Wes Roberts]

Jeff, did you have thoughts on that question? In terms of mentors and the challenges they throw at you.

[Jeff Hazelton]

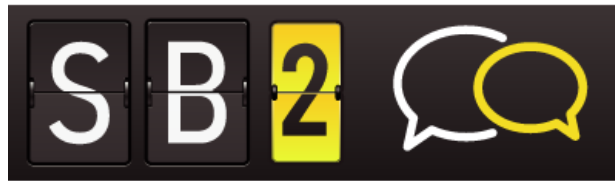
I think whenever we can have challenges and we overcome them or we fail, that's the best opportunity for growth. We hire a lot of recent graduates, so we see this everyday. What I've found is it's important to have someone who's passionate about what they do or bind and connect their passion with what your company does. That's really where you can get the best productivity from employees. I think it's important for students to understand that it is about following what they're passionate about ultimately, but there's going to be some hard work along the way. They need to understand that the people out there that are successful didn't just end up being successful just right out of the gate. They had failures, they learned, they modified what they were doing and they ultimately got to a point where they are successful in what they're doing so they can see those examples. I think that's the main thing. Mentors don't necessarily make it easier for you. They challenge you.

I didn't want to hear that I should go to medical school. But at the same time, you're right. An artist can actually have an effect, you can serve the same purpose but in a different way because that's what you're going to be happiest doing. So I think that's important. There's so much access to knowledge online that people can learn about anything, about the flip classroom and those sorts of things where it's just continuously a growing resource. We have to think about how we teach and become experts in fields that we can practice in the classroom as opposed to just hearing information for the first time and then being expected in the little time we have to master it. I think it's a great approach and I'm starting to see more and more of it as I look at how education is evolving.

[Wes Roberts]

I'm bumping up against my time limit here. I see Jacob lurking behind me, about to give me the yank. We're coming to the end. If people have questions, please hold the questions up so we can gather them if we haven't already. That always buys me time for at least one more question. So Mary, I'll ask a question to you. In some cases, I might be throwing out questions that may be dramatic to try and say, is there a way that we can do things differently? When we talk about engaging kids in a problem solving process and getting a business involved, would our kids graduate from high school better prepared for whatever they do next if half of high school was an internship—if half their hours, they were interning with actual businesses?

[Mary Glass]



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I'd say that would absolutely enhance their learning experience, for sure. The other trend I'm seeing is student on student with programs like AVID where 5th graders help the little ones. I know the school district is looking for funding around that. Again, it's with the reading program, with STEM, with all those. Not only the community and businesses but also student on student, the older children helping the others, that's another trend that's good. I do think it enhances the student's experience if they can actually go out and visit the companies, be inside, see what's really happening. I know Lockheed Martin is a good example of that. That's one of the big players in Manatee County that has helped around the science fair. Talking to the children about how there's going to be this huge opening of jobs in the next few years that they can't fill and talking to them one-on-one and bringing them to the NASA and seeing what's going on. Those are unforgettable things for our children.

[Wes Roberts]

One last question. Maybe we can answer very quickly, each person down the row in just a couple of sentences. Allen, if you could take it first. It's going to be a different question for the businesses versus the people in the education field. How would you call out to businesses to participate? How do you say, "Here's how we did it. It's not so hard. Get involved."

[Allen Carlson]

I don't think it's a matter of looking at the business, per se. It's looking at the employees in the business. Our employees are encouraged to go out into the community and participate in any way—in causes of education, philanthropy, whatever they want. We support their initiatives and we support our employees to take the initiative.

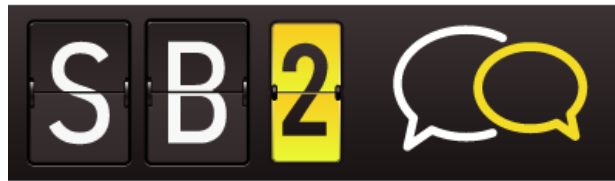
Wes Roberts: Sort of the same question, but maybe reversed a little bit. Like, come on this is how you do it. It's not so hard.

[Mary Glass]

I also find that if we leverage when we have a program—I'm going to give an example like Florida Power and Light and Bright House Networks— they came together to help us do field trips to the South Florida Museum. It's getting those people together that maybe can help us with the transportation. There are ways, small ways or large ways. If it's needs that you have, it's helping the kids and their education. There are many ways you can. That's an open door.

[Susan Scott]

I'll just piggyback on what Mr. Carlson said. His employees do things for us like science fair judges. The last time I was at a science fair, there were 160 judges. I met five Sun Hydraulics young engineers. Here they are interviewing these young kids with their science fair projects. You just saw the kids' faces light up hearing the stories of these young engineers, how they got involved and what inspired them. It's that employee



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involvement, that community involvement, that connection to our real businesses in our community so our kids can have role models and can be inspired by what's going on. There are classroom grant readers, science fair judges, volunteers in our events and programs. It's so important to have that one on one contact with the businesses, that face-to-face contact with the businesses and their employees and our students.

[Wes Roberts]

We have run over, so if anyone in the audience needs to leave, don't feel bad but you will miss out on extra credit, just so you know.

[Jan Pullen]

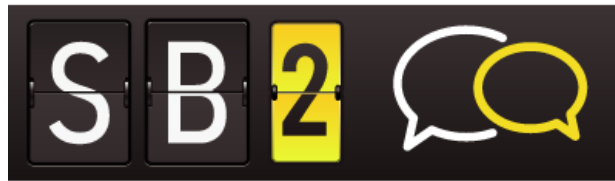
I'll just say that we have really strong partners in education programs. I think businesses out there should try to think what helps if they do support schools. An example is—Willow Smith is here and we've built a couple buildings at Saint Stephens with them. They've come and educated our kids along the way. We have a green middle school, so we teach them all about what it means to be green. Our kids are proud and give tours of the building based on what Willow Smith did, teaching our children about that building. We have a mote club that comes up. We have a dock in the middle of our campus and have a bayou that goes out to the Manatee River. The boat club comes up about three or four times a month and takes our kids out to have practical experience out there. I think it's really that partnership that's—I think schools need to reach out more and businesses need to think how they can help schools.

[Wes Roberts]

Before Jeff answers, Allen has to go. Let's do a round of applause for the whole panel.

[Jeff Hazelton] Just to echo the comments we've just heard, to let employees or employers know that there are opportunities out there going into the schools to talk and share their experiences. To have the schools open to employers coming in. I think whenever we've had experiences like that, they've always been successful. We've judged competitions and we always end up connecting with the instructors that are there and say it'd be great if you came back. I think just to facilitate that in any way we can because it's exciting for us when we get to share knowledge or even get together like with Talent for Tomorrow, we put together a computer science action team. Every single person that we asked was available. These were heads of a lot of the technology companies in the area and wanted to come in because they see every day that we all have the same issues and problems finding the talent that we need. They're eager and it's fun for us to get together and talk about what we can do to make this better. I think just let the opportunities, facilitate them in any way we can, would be a benefit. Everybody is usually willing and eager to put some effort into it.

[Wes Roberts]



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Thank you. I'm going to turn it over to Jacob. We have run over. I want to be sensitive to everyone, especially on our panels. We have a record number of questions. I'm worried that everyone sitting out there wrote a question and is waiting for it to be answered. I think what we'll do is ask two questions. The rest of the questions, we'll see how it goes. The rest of the questions will be provided to the panel and they'll be able to answer them, maybe not all of them but Jacob curates them. When we print the transcript, hopefully those questions that didn't get asked today will get asked at that point.

[Jacob Ogles]

Thank you, Wes and thank you very much to our panel and to Wes for navigating this complicated subject matter. I wanted to ask this question from Lisa Timms: What do schools themselves look for when they're adopting new programs and what type of programs do you need to implement into your own curriculum? Jan, I'll go ahead and pass this straight to you. Maybe the foundation can speak, as well.

[Jan Pullen]

For us, we are always making sure that the basis, and that's where common core comes in, you still have to be able to know your multiplication tables in third grade and there's that common thing that comes through every grade level. It's always that fact of keeping that core base of what you're wanting, whatever that core is. That's different than what it is for the public schools but whatever that core base is, you want to enhance it and enrich it by giving the kids exposure and opportunities to think a little differently. One of the things we look at and emphasize is that the world has become more global. One of the challenges we've had is how do you connect that global world into this world that we're still trying to teach this foundational learning.

This is where those 21st century skills that we keep referring to of creativity, communication, critical thinking, analysis come in because you want to have those opportunities where you can bring those in. I know for us, we've got signature programs with our global initiative where we have our kids Skyping with kids all over the world. We have 12 sister schools around the world. It's that innovation that we're trying to look at. The whole STEM program that everyone has referred to today is kind of a buzzword out there. What it really means is that teachers who are teaching English are actually looking at how technology and engineering and mathematics and science all play into literature and literacy. I think it's that broad range. Again the kids today have had such exposure. They're not in the same world that I grew up in. They're exposed to so much and it's got to be exciting and challenging for them.

[Susan Scott]

Just to add real quick, the criteria that our school district uses and we use when new programs are implemented is there evidence that they can actually improve student performance. We just implemented a program in the middle schools. Where it was implemented the level two performers and the level one performers, 50% of them have



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moved to level three using this new program. That's the evidence-based programs that we will find for our district. A lot of times, we'll give students the opportunity for students to do something creative and create their own research so they can try something. But it is about student performance.

[Mary Glass]

Just real quick, I wanted to add that in Manatee County, we ran into a different sort of situation where we ended the year and a couple companies came together with the foundation matching. There were funding shortfalls for the program. Everybody chipped in and helped them get through to the end of the year. That's just another reason why Adopt a School is such a wonderful thing.

[Jacob Ogles]

This question is from Henry Laurence, a candidate for congress who's concerned about the gap in education technology compared to other countries. He was asking if students should be required to do a book camp with no computers so they can problem solve without the aid of computers and calculators.

[Jeff Hazelton]

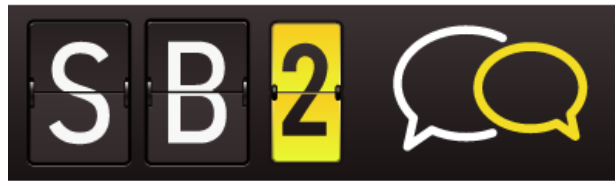
I think that, without the aid of those things, that's not reality. That's not real life. We have those things here. It's about taking those things that we have at our fingertips and using them in the best way that we can. If you talk about where we are in comparison to other countries, if you look at co.org or some of the other organizations that have been put together by some technology leaders where we're comparing every student in China who's learning computer science versus 5% of us. It's a pretty stark contrast. People talk about outsourcing and all of the other activities that are going on. It's not merely the cost of labor, it's the skills, the knowledge that we have that we're being educated in that's causing these types of jobs to go overseas. That exercise of removing the equipment and technology that we'd be using normally is probably not the best approach.

[Henry Laurence]

I didn't mean get rid of the computers. I asked kids who were doing some stuff that didn't have computers available to do calculations. That's what I'm talking about. I'm not talking about getting rid of technology.

[Jeff Hazelton]

So doing math without a calculator so that you can do it in your mind. Yeah, mathematics is essential so you have to learn to do that and learn those critical thinking skills if you want to be able to do that. I understand your question now. That's an approach we need to know. That's a core way of thinking.



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They haven't taken away from performance standards a child's ability to calculate without a calculator. They have to be fluid in their multiplication tables and be able to apply the addition and so forth.

[Jacob Ogles]

We will be sending all of the panelists the questions that we couldn't ask. I was going to close with one. We had several duplicates. People who are here as citizens, concerned about education are basically asking how that group can help you guys out.

Like you said on so many levels, volunteer, going into the classrooms, helping with funding. Really just reaching out—there are many needs and many things that need to be fulfilled. With that, I'd just say call us.

We have a program called PALS, Partners in Education. We have 9000 signed up to be tutors and volunteers in the school system directly working one-on-one with student and teachers. That's one of the most basic ways and one of the most valuable way you can support.

I would say the same thing. Just get out and see where you can fit into the education system because it is really rewarding. I love my day everyday because you have the little three year old, four year old, five year old who says the darndest things. It makes you smile. Being around high school kids is very intriguing and not scary. They're wonderful and want to succeed in this world. But I'd also say this: if you have an opportunity to celebrate teachers, having traveled to places around the world like china, where teachers are so valued, one thing we forget here in America is that we should be valuing the teachers. There are hundreds of teachers in Sarasota and Manatee County and we should be taking our hat off to them.

[Wes Roberts]

Thank you all for your engagement and involvement. A special thank- you to Frank Levey with the Citizens Concerned about Education. Their organization, there's a lot going on. The best way for people to find out more is by searching for the Strategic Doing Conference. It's on September 6th at Robert L. Taylor Community Center, organized by the Citizens Concerned about Education. A big thank-you again for our panel. Thank you to you all, IMG, CS&L. Have a wonderful rest of your day.