

City of Dublin, Ohio

WORKFORCE DEVELOPMENT FEASIBILITY STUDY

Prepared for — City of Dublin, Economic Development Team

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EXECUTIVE SUMMARY

Introduction

This report provides qualitative insights, corroborated by a quantitative survey, obtained through in-depth interviews with Dublin businesses on the topic of addressing the IT skills gap and creating a workforce development strategy.

Background

The City of Dublin Economic Development team has a long-term vision and commitment to business leadership and sustainable workforce development. This commitment goes beyond short-term skills training to include long-term strategic and cultural support for the entire Dublin business community.

For this reason, the Economic Development team, along with Alloy Research and Brand Strategy, committed to a three-month qualitative and quantitative research study focused on uncovering the workforce development and employee training

needs beginning with a focus on IT and Healthcare companies.

Our efforts are in response to the IT skills gap, a specifically significant threat to technology and healthcare companies across the U.S.; Dublin being no exception. In a survey performed by TEK systems of more than 600 IT leaders (CIOs, IT VPs, IT directors and IT hiring managers) and nearly 700 IT professionals in North America, only 32% of IT leaders and 33% of IT professionals believe their organization has the skills in-house to address their needs. IT leaders cite an unqualified candidate pool and a mismatch of competencies as significant challenges to filling open positions. This problem is especially acute in technology and healthcare, as thousands of STEM jobs will go unfulfilled as companies struggle to recruit candidates with the necessary skills. This poses a significant threat to the current and future health of Dublin businesses.



The City of Dublin Economic Development team has a long-term vision and commitment to both business leadership and sustainable workforce development.

EXECUTIVE SUMMARY

Ultimately, the purpose of this study comes down to Business Retention/Expansion/Attraction/Creation, and Workforce - keeping companies and people in Dublin. It's also about bringing people to the city as a way to ensure growth for the future.

Feasibility Study Summary

Before beginning our study, the Economic Development team, along with Alloy, hypothesized the best way to address the needs of Dublin businesses was to create a shared, online learning platform that featured newly created content usable for employee training. The proposed platform would benefit the Dublin business community in three primary ways:

1. Retain and expand current relationships with Dublin's technology and healthcare business leaders.

2. Attract and foster new technology companies with unique benefits of skills training, recruitment, and other workforce strategies that are crucial to short-term and long-term prosperity.

3. Strengthen the brand position for the City of Dublin as a partner in economic and workforce development, and visionary thought leaders attracting new business from around Ohio, the U.S., and the world.

The three month research study was a way to test the feasibility of our hypothesized solution. As mentioned, the study was led by Alloy, with participation from Dublin Economic Development team members. The team conducted in-depth interviews with Dublin's business leaders and influencers, focusing primarily on the IT and health sectors. The insights uncovered in the 21 qualitative interviews were then corroborated by a quantitative survey of 144 respondents.



A three-month qualitative and quantitative feasibility research study.

EXECUTIVE SUMMARY

The in-depth interviews revealed many hidden needs of Dublin-based businesses. Primary needs include talent recruitment support, training cost support, and access to several specific training topics.

Though training programs to address these topics would certainly have value, the study ultimately proved that the original hypothesis (the creation of an online training platform) is not feasible and should not be pursued by the City of Dublin.

Rather, the City of Dublin should implement a strategy that helps companies in a more immediate and tangible way. There are a variety of ways and strategies to go about this, however, research validates the use of very specific approaches as seen beginning on page 55 of this document.

Top-line Strategic Recommendations:

Research revealed three primary avenues the City of Dublin can pursue to help the Dublin business

community. Each involves varying difficulty level and time commitment. Below is the top-line of each strategy. More information is available further in the document.

A Tactical Approach:

- Strategy one is a tactical approach that involves a minimal amount of risk and a varying amount of impact. This strategy offers a primary benefit of supporting specific discussions with small businesses. It also serves as points of emphasis or “reasons to believe” in Dublin’s overall commitment to tech companies in general, specifically in connection to the brand identity currently being developed. It is important to note, however, that these tactics are not meant to be flagship offerings, as they are harder to sustain and more easily duplicated. Please see more details about this strategy on page 55.

(Continued on next page)



Creating an online platform offering newly created online training is not feasible.

EXECUTIVE SUMMARY

Place Branding:

- Many businesses we talked to made it clear that recruiting talent into the Dublin, Ohio area is an uphill battle. Companies cited a lack of awareness of the community, limited attractions, and even weather as an obstacle in hiring and retaining top talent. With this in mind, there is an opportunity to capitalize on current branding efforts and commit to sending a unified message of who Dublin is today and who Dublin will be tomorrow for both employers and employees. By leveraging place branding strategies, both the city and its businesses can align under a common understanding of what the city believes. For more information and quantitative research on the Place Branding strategy, please see page 56.

Align Columbus 2020:

- Much like the insights leading to the Place Branding strategy for the City of Dublin, research also revealed a more obvious awareness problem for Central Ohio. The efforts of Columbus 2020 have done an excellent job of offering independent municipalities an opportunity to take advantage of

the unified message of the 'One of Us' campaign. However, it seems few are fully committed to building a city identity around the larger brand of Central Ohio. By uniting surrounding municipalities, and making an effort to speak in a unified voice, Central Ohio and Dublin can increase awareness to the area and in turn reduce the difficulties of recruiting and retention. For more information on further utilizing Columbus 2020, please see page 58.

Closing Comments

Lastly, The City of Dublin Economic Development team, along with Alloy Research and Brand Strategy, would like to thank all of those who participated in both the qualitative interviews and the quantitative surveys that are outlined and discussed within this document. Your support and participation are instrumental in the success of this project and the future of the Dublin business community. Thank you.

- Paul Priddy & Asa Schultz, ALLOY



Research reveals three strategic opportunities for the City of Dublin.

RESEARCH METHODOLOGY

- | Goal
- | Research Question
- | Research Participants
- | Methods
- | Areas of Inquiry



RESEARCH METHODOLOGY

Goal	<ol style="list-style-type: none">1. Understand the specific nature of the IT skills gap to better address business retention; expansion; attraction; and creation efforts; and2. Assess the need for an online learning and development platform for the Dublin business community.
Research Question	What struggles does the Dublin business community face, and what strategies can help companies bridge the gap?
Research Participants	<p>Participants come from IT and healthcare IT companies in the City of Dublin, and range in company size, seniority and role. (n=21)</p> <p>Quantitative corroboration achieved through survey from Dublin-based businesses representing a broad range of industries. (n=144)</p>
Methods	Semi-structured in-depth interviews were conducted, with 1 primary interviewer, and 1-2 additional, lasting approximately one hour.
Areas of Inquiry	<ul style="list-style-type: none">• Previous learning methods used, and their effectiveness• Skills gap awareness and impact. Missing skills in teams, company.• Levels & Quality of cross functional interaction.• Contextualized Learning.• Experiences with coaching, and the effectiveness of coaching.

INTERVIEW INSIGHTS

| Dublin Community Insights

- | The Dublin Magnet
- | Local Thought Leadership

| Training & Learning Insights

- | Digital Saturation
- | Soft Skills are the Hard Skills
- | Cost Mitigation
- | The Status of Employee Technical Training

| Recruiting & Retention Insights

- | Culturally Successful
- | New Talent Nightmare
- | Employer Branding Arms Race



DUBLIN COMMUNITY INSIGHTS



Dublin Community Insights

THE DUBLIN MAGNET

DUBLIN - A MIDWEST IT MAGNET

Qualitative Insight: Dublin Faces a Universal Problem of Attracting and Retaining Quality IT talent.

In-depth interviews with numerous businesses showed that Dublin businesses are challenged with talent recruitment and retention. One company describe recruiting challenges of having to “sell” Columbus to potential talent, which serves as one of the “greatest hurdles” in the hiring process. Another company representative spoke of a settling strategy used. Saying, “We need the B players because the A players are going to leave in a hot minute. They are going to be in Chicago, California, whatever...”

If this problem goes unaddressed, it will have severe and adverse implications for the future success and development of the City of Dublin.

These difficulties stem from the low number of multiple talented IT professionals (individuals possessing both strong technical skills and soft skills) and the extremely high demand for these talented individuals nationally. Local employers compete not only with one another, but also with tech giants like Facebook, Google, and the allure of the West and East Coasts. The result is that Dublin businesses are forced to take extreme measures, often in the form of salaries, flexibility, and specific project requests, to even begin to compete.

Difficulty finding the right talent is one of the primary causes of the IT skills gap. Research indicates that more often than not, employers had the training resources they needed, they just didn't have the people that needed to receive the training.

One option for Dublin is to choose a strategic and externally facing voice that differentiates itself in a clear and compelling way. Aligning on a single voice would involve defining the identity of Dublin as a Midwest IT magnet, and positioning the city based upon this identity.

Strategic Opportunity : Combating Recruitment Challenges Requires Dublin to become a “Midwest IT Magnet.”

It's important to understand exactly how the City of Dublin is perceived. Once the perception of Dublin is known, the city can begin to own its true identity.

Being an “IT Magnet” may fit Dublin's identity. However, it will be important to be sure this identity is authentic before creating external campaigns communicated by the City of Dublin.

Survey results revealed that currently Dublin is overwhelmingly viewed as “A nice place to live” (from 144 survey respondents). It is important for the City of Dublin to explore these results further if they wish to be identified as a nice place to live, or as a tech hub of the Midwest, or a combination of the two. What's important is that Dublin focuses its efforts on one pillar of excellence moving forward that serves as its greatest strength. Whichever positioning the City chooses, the positioning must match the identity. Otherwise, efforts will fall short.

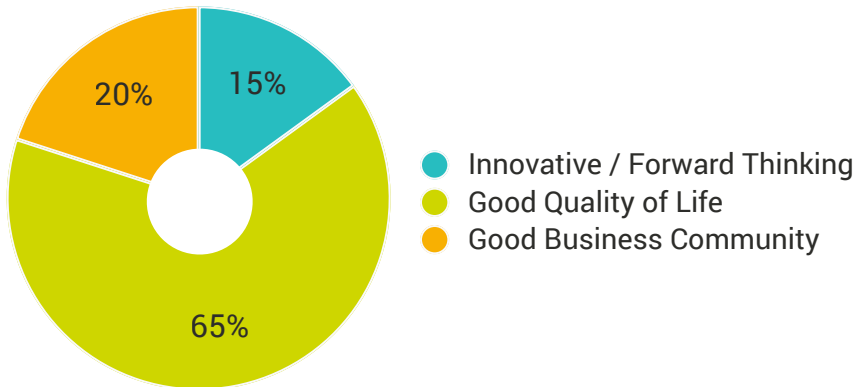
DUBLIN - A MIDWEST IT MAGNET

Quantitative Survey Findings: Who is Dublin?

Respondents were asked to describe Dublin in a few words in the survey.

The results were overwhelmingly positive, but somewhat generic. Generic responses indicate a lack of differentiation of the City of Dublin to the people that live and work there.

Q40: In a few words, how would you describe Dublin as a community? (Comment Box)



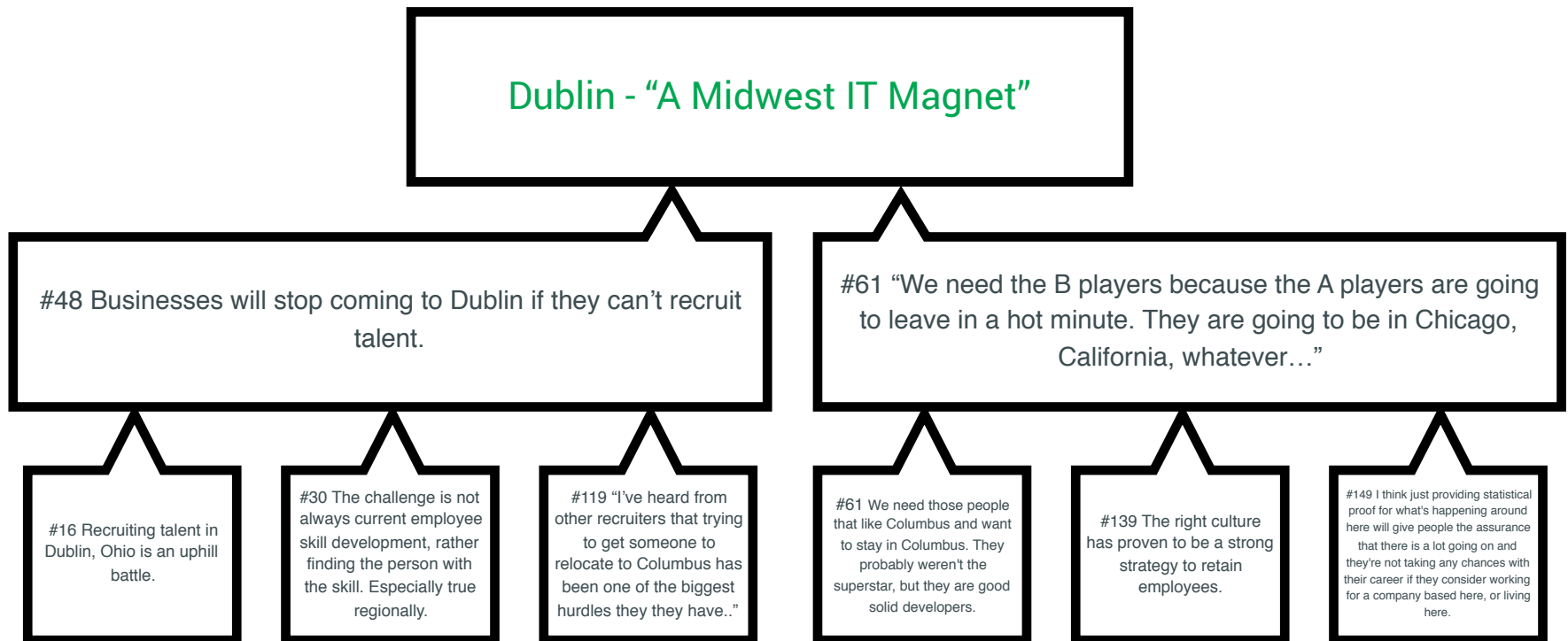
Open ended responses, sorted into 3 primary categories.

Strategic Steps: Consider Place branding for the City of Dublin.

Place branding will involve the support of an outside firm; this strategy will support a long-term vision of who the City of Dublin is now and in the future. This vision will allow the city to be recognized both regionally and nationally and serve to recruit and retain more talent.

Learn more about this on page 56.

INSIGHT PYRAMID - DUBLIN AS A MIDWEST IT MAGNET



PLACE BRANDING

The most recent publication from the world renowned brand expert, Jean-Noel Kapferer, speaks of Place Branding (specifically thinking of towns as brands) as a necessity that “all municipalities will perforce have to turn to brand concepts to manage their town more efficiently and contribute to its growth.” This insight, along with a flurry of town and city branding efforts over recent years, further supports the evidence of place branding being a viable option for the City of Dublin.

Cities including Philadelphia, Pittsburgh, Buffalo, Nashville, New Orleans, Indianapolis, Cincinnati, D.C and Denver, to name a few, are working to put their most appealing credentials forward and solidify their positions of growth for the future. Additionally, smaller towns such as Covington, KY (right), have gotten into the mix to ensure positive growth in the future. Benchmarks are listed on the next page.



PLACE BRANDING EXAMPLES



Covington, Ky: Building Greater long-term Identification

To separate itself from the shadows of Cincinnati (located directly across the Ohio River), the small City of Covington worked to create a brand identity that spoke with one voice, the voice of Covington. As the mayor of Covington says, "By speaking with one voice, under one brand, we will present a united front with all our individual programs contributing to the City of Covington's reputation for excellence in leadership, innovation, and community service." -covingtonky.gov

For more information on Covington, visit the City of Covington website.



Philadelphia: Leveraging Universities and Internships

Philadelphia leveraged its strength in young university talent by creating a robust internship program, "Campus Philly." In just a few short years, Campus Philly has contributed to 76 percent of natives staying in-town (up from 60 percent in 2006), and 51 percent of non-native Philadelphians staying in-town upon graduation (Source: "Americas Declining Cities Try to Attract Millennials")



Pittsburgh: Fostering Startups

The city utilizes a program called Innovation Works which is part of a robust talent acquisition campaign. The goal of Innovation Works, in the organization's words, is to be "dedicated to making Southwestern Pennsylvania a center for innovative startups and tech investors from around the country" (innovationworks.com). Programs like Innovation Works, Imagine Pittsburgh (A powerful job aggregator), and strong universities have increased Pittsburgh's 25-29 and 30-34 populations by nearly 2% respectively from 2010-2014.

For more information visit innovationworks.com



Cincinnati: Engaging Young Professionals

Like the Columbus area, many people just aren't aware of the benefits of living in Cincinnati. That's why the city has focused on connecting young talent with local businesses and community events through programs like HYPE, C-Change, and Cincy Next. The goal is to help young professionals truly engage and experience the city which will help them become life-long residents. (soapboxmedia.com "The battle for talent..")

REGION BRANDING EXAMPLES



“The New North”

For some cities, though, a regional branding strategy is taking shape. The “New North” in Wisconsin is a great example of a region using its combined strengths to recruit more people and keep more people in the area.

With a core value of collaboration, the New North (a collection of 18 counties in Northeast Wisconsin) has a mission of “ harnessing and promoting the region's resources, talents, and creativity for sustaining and growing our regional economy.” This vision of the New North is to be nationally and globally competitive for job growth while maintaining a superior quality of life.

Currently, the New North is a nonprofit organization that functions as a regional marketing and economic development organization that works to build collaboration among private and public sector leaders throughout the 18 involved counties. (Source: “[The New North](#)” website. Linked).



“Hello West Michigan”

“Hello, West Michigan” seeks to “increase the rate of success member companies have in their efforts to recruit top talent” ([hellowestmichigan.com](#)). A primary focus of the strategy is to assist “dual career” in their transition to a region. According to the initiative's website, 10 to 12 couples contact Hello West Michigan weekly, and a team member helps to connect them with a potential local employer in the region.

One primary benefit of Hello West Michigan is the centralization of relevant information to nearly arriving families. Rather than searching and hoping, husbands and wives are now able to find exactly what they need, when the need it which helps immerse more quickly and establish lasting roots.

(Source: “[Hello West Michigan](#)” website. Linked).

REGION BRANDING EXAMPLES



“Columbus 2020”

The Columbus 2020 initiative and the ‘One of Us’ campaign has done an excellent job of bringing attention to the Columbus region and of taking deliberate steps to create an ownable brand for the 11 counties involved. The results are clear: with 130,000 jobs created, \$7.5 billion in capital investment, and a raised per capita income by 17% since 2010 (columbusregion.com).

A unique aspect of Columbus 2020 is that surrounding municipalities are encouraged to use Columbus 2020 marketing materials for their benefit. This allows for the potential of immediate brand recognition for individuals who may have seen the campaign anywhere from the Columbus airport to Washington D.C. subways.

There is room for improvement, though.

As of now, research appears to indicate the Columbus region is still difficult to recruit to, and that municipalities are not activating the brand as much as possible. For more information about Columbus 2020, visit columbusregion.com

COLUMBUS
2020



Dublin Community Insights

LOCAL THOUGHT LEADERSHIP

LOCAL THOUGHT LEADERSHIP

Qualitative Insight: One of Dublin's Greatest Untapped Resources

For years, prominent individuals within the IT and Healthcare field have been investing in sharing their expertise and insights with the business community. However, our interviews revealed the voices of these individuals aren't always being heard.

Upon asking businesses what they would like most from the City of Dublin, one of our more recurring requests was that seminars and speakers be brought into Dublin, rather than businesses having travel long distances.

From this request, it became clear that there is a lack of coordination and identification of prominent individuals who are willing to share their knowledge and experience for the betterment of the Dublin business community.

Dublin would benefit exponentially from reaching out to these leaders and exploring ways to help coordinate their efforts in a more strategic and intentional way.

Strategic Opportunity: Unleash the Power of Thought Leadership

Identify and coordinate local thought leaders and innovators as a way to help provide affordable high-touch training and idea sharing for local businesses while also giving a voice to leaders in the community. In doing so, we can continue to reinforce Dublin's emerging identity as a technological leader. Activities could include hosting meet-ups and conferences or speaking at local venues formally and informally. There are many incredible leaders in Dublin that we can approach sooner, rather than later.

LOCAL THOUGHT LEADERSHIP

Quantitative Survey Findings: Dublin workers leave town for thought leadership.

The survey showed a significant opportunity for Dublin to host its thought leaders in a forum that could benefit the entire Dublin business community. 70% of respondents had attended a user group, Meet-up or speaker related to their work in the past year, but of those who had, less than a quarter listed attending an event in Dublin.

30% of respondents said they could see themselves attending a Dublin-based speaker series monthly, and 82% stated that they would attend a few times a year or more. Additionally, 48%

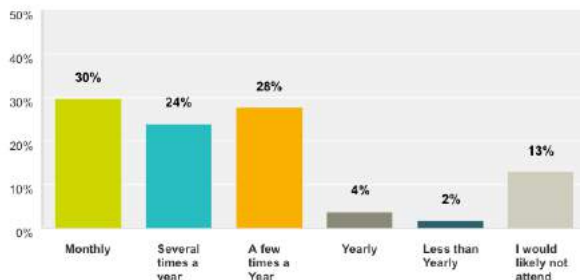
answered “yes” or “maybe” when asked if they had any interest in presenting at the speaker series.

Strategic Steps: Contacting Partners and Recruiting Speakers for a Dublin Speaker Series.

A Dublin-based speaker series would be an excellent first step in growing the Dublin reputation and offering companies educational opportunities to develop their employees.

We also see this as an excellent opportunity to pilot and test other workforce development opportunities.

Q18: If Dublin hosted monthly speaker events covering business topics and IT trends, how often would you see yourself attending?



Further thoughts from respondents:

“Due to its proximity this would be low cost and easy to reach.”

“Since I work in Dublin, I would find this easy to attend. I would also encourage my employees to attend as well.”

“I currently attend many events at Rev1, it would be nice if the DEC had more.”

INSIGHT PYRAMID FOR LOCAL THOUGHT LEADERSHIP

Local Thought Leadership

#245 “Find local people who presented at national conferences and host a talk on a topic in Dublin.”

#182 Helping others be aware of what MeetUps are available for employees to find their niche.

#36 Companies want speakers to come to Dublin, and companies also want their own SME's to speak on topics as well.

#181 "So, I would be personally, selfishly, I would be interested in attending, on behalf of (company) for tutoring, teaching, mentorship kind of stuff." - Prominent tech professional

#26 Bringing a content specialized trainer "to" a location, rather than "going to" an off-site location is viewed as preferable and cost effective.

#41 Companies are highly interested in the City of Dublin driving awareness of tech opportunities within the city.

#33 Companies are asking Dublin to encourage a culture of IT savvy and tech friendly. i.e. community get-togethers, best practice sharing, and "ways we can help each other."

#131 "Anything the city can do to help increase the population density of those types of core skilled individuals, since our business is information." - Business Owner

TRAINING & LEARNING INSIGHTS



Training & Learning Insights

DIGITAL SATURATION

DIGITAL SATURATION

Insight: There is a Proliferation of Available Digital Training Content.

Overall, businesses within the City of Dublin have access to robust online learning resources and training. This largely held true for businesses of all sizes. However, the challenge to retain current talent and stay cutting edge in a constantly changing business climate demands a more engaging experience than the typical “click-ed” curriculum can offer. Leaders of training and HR initiatives recognize the outsized power of in-person training and coaching over digital coursework.

The move away from readily available online training content can be clearly seen in the i.c.stars project championed by Ryan Frederick with Dublin based AWH. The program uses, “project-based learning and full immersion teaching,” as a way to provide “an opportunity for change-driven, future leaders to develop skills in business and technology” (icstars.org). Though this project is just beginning in Columbus, it has had incredible success in Chicago.

In fact, Dublin based IGS Energy has signed on as i.c.stars’ first client in the Columbus market (bizjournals.com).

This example, among numerous others, is a clear indication of the need to move away from online content and instead focus more on a more personal training platform. This will enable employees to participate in the most powerful forms of learning, right in their community.

Strategic Opportunity: Engaging in high-touch In-person Training.

The abundance of online resources offers limited growth and opportunity for Dublin to leverage. City of Dublin businesses would benefit from leveraging in-person opportunities that provide high-touch training on relevant topics as a way to help move companies and people forward in a more engaging and interactive way.

DIGITAL SATURATION

Survey Findings: The City of Dublin Should Not Develop Original Online Content.

The survey results confirmed the prevalence of online training and education.

58% of respondents used online training at their companies and only 15% said that it was “difficult” or “very difficult” to find the necessary training materials. 58% rated the effectiveness of this training type as “fairly effective” compared to only 8% that said it was “not very effective.”

Overall, companies using on-line training platforms indicated it was working fairly well for them.

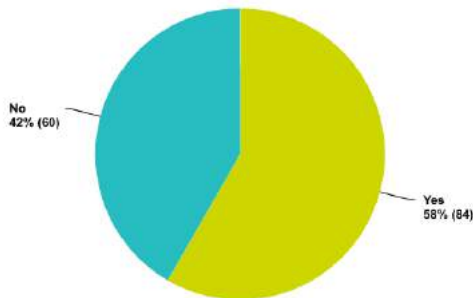
Strategic Steps: Focus on In-person Training and Education.

Research supports pursuing in-person training opportunities.

Though people were satisfied with their online training, when asked to compare it based on effectiveness to in-person training, 68% said that in-person training was “slightly more effective” or “much more effective” than online training.

The high rate of effectiveness attributed to in-person training reveals the need and opportunity to focus on in-person training.

Q23: Do you currently use online training (i.e., vendor supplied, MOOC, purchased courses, Lynda, LearningTree) within your company to train employees?



Q27: How would you compare online training to in-person training in terms of effectiveness?



INSIGHT PYRAMID FOR DIGITAL SATURATION

Digital Saturation

#310 "...Some different on-line resources we've found to be either really cost-effective or free." - Talent Acquisition and Development Specialist

#319 [Most impactful training] "I would say the in-person trainings have probably been the most impactful. We were really intentional about bringing people in." - Talent Acquisition and Development Specialist

#21 Employers purchase training from companies like "New Horizons."

#171 Local companies use industry-known training videos to help employees learn new skills.

#198 Currently there are online training platforms companies have access to.

#176 In-house lunch and learns are strategies used to introduce new topics or tech

#215 "the most valuable training is the training that turns the lights on for employees. The "ah ha" moment." - Local CEO

66 Companies want speakers to come to Dublin, and companies also want their own SME's to speak on topics as well.

Addison Robin
Market Analyst

Training & Learning Insights

SOFT SKILLS ARE THE HARD SKILLS

SOFT SKILLS ARE THE HARD SKILLS

Insight: The Pain of Soft Skill Development

The technologically advanced businesses of today require a new form of employee. One with highly developed technical skills and the personal, or “soft skills,” necessary to consult and interact at a high level. These specifications have caused a change in the way employers hire, as the job of an IT professional extends well beyond the comfort zone of coding and learning new program languages.

Dublin businesses face numerous obstacles in hiring the talent that fit the demands of clients. One major hurdle is that Dublin businesses are having to compete with national powerhouses for an already slim pool of potential hires. With a perceived lack of draw to the city, this is a daunting task.

The lack of an allure for top tier talent relegates Dublin employers (specifically small to medium sized employers) to settle for employees lacking some of the skills deemed critical. The difficulty in this is that training employees on the personal skills required to collaborate with clients have proven to be nearly unachievable. Businesses struggle to find and develop the right training to have a higher employee training success rate. This is causing issues as it relates to businesses staying

ahead of customer expectations which could have long-term negative impact on the overall health of the Dublin business community.

A few companies, though, are fighting against the difficulty in soft skill development by hiring much younger employees. The strategy is to hire based on aptitude to learn, rather than hiring based upon previously mastered technical skills. The thought is that if a young employee possesses the right attitude, and aptitude, the company can integrate the employee into a more collaborative and ‘non-siloed’ working environment. Immersing young employees in these types of environments effectively resolves the issue of poor soft skills and presents an increased likelihood of having IT talent capable of both technical and social competencies.

Strategic Opportunity: Bridge the Gap with In-Person Soft Skills Training.

Though this challenge may be difficult to address, Dublin businesses can universally benefit by offering training that bridges the gap between technical skills and soft skills. Focusing on indirect factors like company culture and re-thinking how employees work together fosters and encourages working environments that are increasingly collaborative.

SOFT SKILLS ARE THE HARD SKILLS

Survey Findings: Soft Skills are Vital and Difficult to Train

Qualitative research revealed soft skills as vital to a company's success. Quantitative surveys corroborated initial findings as 82% of respondents identified soft skills as "important" or "very important."

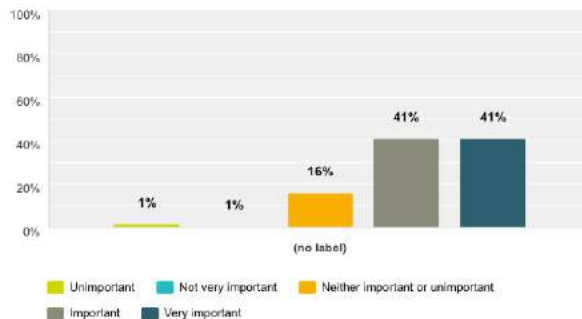
However, implementing this training was a mixed bag. 30% said they needed to implement soft skills training, but had not done it yet. 43% of those who had, said it was "neither effective or ineffective" and only 12% said it was "very effective."

The interest in soft skills showed in the topics of interest for the speaker series, coming in at the most requested topic, with 57% expressing interest.

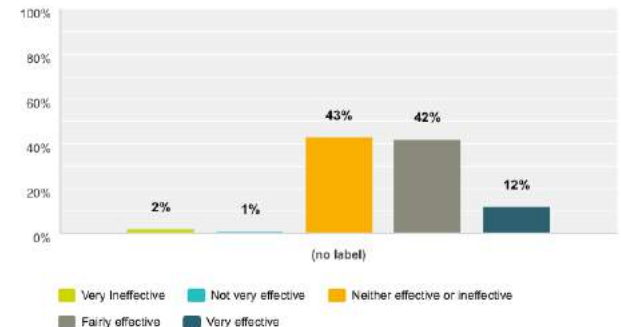
Strategic Steps: Highlight Soft Skills in the Dublin Speaker Series and Pilot Soft Skills Workshops.

For a skill so vital to a business' success, adequate or average training will not suffice. The City of Dublin has an excellent opportunity to meet this need through speakers centered on soft skills, and piloting soft skills workshops through the Dublin Speaker Series.

Q31: How would you rate the importance of soft skills to yourself or your company?



Q29: If you have implemented or participated in soft skills training, how effective was it?



INSIGHT PYRAMID FOR SOFT SKILLS ARE THE HARD SKILLS

Soft Skills are the Hard Skills

#216 You can't train the willingness to learn; curiosity, excitement, personal skills

#238 With the right training in place, people with the right personality flourish.

#79 It would be great if there was some way to develop soft skills in people

#156 "If the person has the good core skills... interpersonally, you either have them or you do't."

#127 Personality is attributed as the key element to career success

#240 "I need someone that is really good in technology but has a personality and wants to be customer facing."

#216 Case study of a 7 day bootcamp to teach unemployed college graduates basic business and personal skills

#116 "I don't need a robust programmer, I need a problem solver that uses existing tools and understand business aspects."

Training & Learning Insights

COST MITIGATION

COST MITIGATION

Insight: Time and Money Hinder Individual Training and Certification Efforts.

The cost of quality seminars, certifications, and off-site training is a barrier to employee development, specifically for small to mid-sized businesses. For this reason, many companies opt for a more “click-ed” approach which has proven to be less engaging and far less productive for employees.

Company leadership and training leadership agree that in-person education is the most powerful, but have to settle for online coursework due to budget and time constraints. Our in-depth interviews revealed that businesses were eager to participate when discussing this option and were excited at the possibility of reduced costs and greater access to training for their employees.

Strategic Opportunity: Make Efforts to Increase Accessibility.

Cost mitigation can be achieved by sharing certification classes between multiple businesses, offering streams of conferences at a Dublin venue, or hosting classes in Dublin to increase accessibility. Providing these solutions can serve as huge benefits for small businesses working to minimize travel time, and the costs of training while also improving training accessibility.

COST MITIGATION

Survey Findings: Mixed Responses

The survey results for this topic were mixed. The pricing question that compared in-person to online training yielded answers across the board, some willing to pay more for in-person, some who would pay less, others who didn't know or care.

We also saw that the decision to use online training platforms was driven by time and cost constraints for 35% of our audience, and overall, respondents saw in-person training as more effective than online training (See chart below).

Q27: How would you compare online training to in-person training in terms of effectiveness?



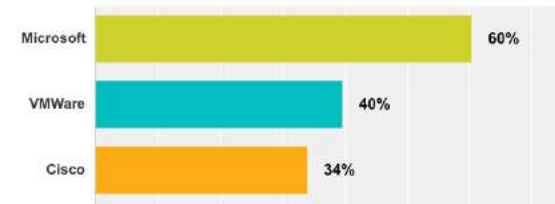
Strategic Steps: Test Through Small Pilots.

The survey responses lead us to believe that this may not be as sought after as the qualitative study suggested.

There are however still some opportunities to help the small and medium-sized businesses in our community with cost mitigation. If the City of Dublin chooses to pursue this, we suggest they:

1. Start small with a single certification and group of companies to pitch the idea and gauge interest.
2. Focus on the top 3 needed certifications and training providers: Microsoft, VMWare, and Cisco. (See below)

Q14: What types of certifications or training does your company use or need? (Select all that apply.)



INSIGHT PYRAMID FOR COST MITIGATION

Cost Mitigation

#140 “Hey, we’re bringing them in and it’s 500 bucks a person to go, we would do it because it would be a day or two and everybody would pool their resources and make it work.” — Local CEO

#145 Dublin should more effectively utilize the buildings and university facilities they have access to. (specific to hosting)

#220 Companies can apply for training subsidies through the State of Ohio

#47 The training almost always exists. It’s just a matter of paying for it.

#132 It’s both costly and difficult for businesses to find the right trainers to bring in to Dublin.

#243 Using vendor marketing money to fund certifications

#76 If that was made available in a subsidized fashion that would be amazing. (Specific to soft skills but relating to cost and access)

#58 We help the small guys by bringing training to Dublin

Training & Learning Insights

THE STATUS OF EMPLOYEE TECHNICAL TRAINING



THE STATUS OF EMPLOYEE TECHNICAL TRAINING

Insight: Skills are Specific and Tailored to Individual Organizational Needs.

Throughout the research, companies revealed technical skills demand to be extremely varied due to an endless variety of software languages being used. Various skill requirements create the need for unique technical training methods and strategies.

Additionally, those IT skills that are not as business specific and more overarching in the IT field often already have a significant amount of pre-existing online training.

Research indicates it would not be in the overall best interest of our companies and the City of Dublin to attempt to generate new content, especially online content, that attempts to address the average or generic needs of IT companies.

Strategic Opportunity: Focus on Strategic Communication.

Areas of opportunity could include communicating emerging technological trends (a common request from many), soft skills training, recruiting best practices and approaches and other less narrow popular topics of interest to Dublin businesses.

Survey Findings: Training Priorities

Surveys helped verify this insight. Focusing on broader business topics, and emerging tech trends will bring value to the largest audience.

The top four topics for **all respondents** were: *1. Soft Skills, 2.General Business Topics, 3.Culture and 4.Collaboration Techniques*. The top four from **IT respondents** were: *1.Security, 2.Soft Skills, 3.General Business Topics and 4.Internet of Things*.

INSIGHT PYRAMID FOR THE STATUS OF EMPLOYEE TECHNICAL TRAINING

The Status of Employee Technical Training

#184 Every job is different so employees go through highly specified training to their job.

#194 Companies are interested in learning the newest/latest and greatest tech that they can implement into their own companies.

#19 Corporate requirements drive training. Example, keeping Microsoft gold level.

#297 New technologies often come with established training that, with the right culture, can be learned quickly by employees with high existing tech aptitudes.

#292 Each program has a unique set of skills required to become effective.

#39 Software development is emergent by nature. New problems require new software. It's hard to train for that.

#241 Dublin needs to "Find those partners that are looking to move their concept of technology, and fund the trainer and certifications, that's a tremendous value to mid-tier companies."

#204 Certification tracks change so companies are forced to be nimble.

RECRUITING & RETENTION INSIGHTS

Recruiting & Retention Insights

CULTURALLY SUCCESSFUL

CULTURALLY SUCCESSFUL

Insight: Culture Linked to Strong Training and Retention.

Businesses that implement focused strategies to develop a particular culture tend to have fewer problems recruiting new talent, training emerging talent, and advancing established talent.

For example, one larger IT company we spoke with wanted to build a culture of collaboration and innovation. To achieve this, they revolutionized the way they worked. Rather than having employees work in silos that limited cooperation, this company began implementing paired programming approaches to foster a more collaborative community. The result was breaking out of task-focused activities and instead working toward more generative ideas that enabled employees to develop products rather than just ‘write code.’

We also spoke with a company who faced difficulties engaging and developing employees who seemed to be promising upon

hire. The solution was to help these employees understand the upward trajectory they could achieve. To do this, the employer worked to guide developing employees through their roles with step-by-step training. This approach worked to boost confidence in newly hired employees and also push current employees to achieve more. In the end, this company built a culture of constant improvement.

Strategic Opportunity: Offer Training Programs that Help Shape Cultures.

The City of Dublin could work to improve cultural awareness by hosting workshops for companies specifically interested in the topic. Hosting workshops would also work to improve the overall perception of Dublin business culture. In addition, these offerings could position Dublin as an exclusive IT community where top talent can find the desired ‘upward career trajectory.’ This would reduce the risk of losing the great talent companies work so diligently to train and develop.

CULTURALLY SUCCESSFUL

Survey Findings: Behind Soft Skills, Focus on Culture.

Respondents rated their own business' culture highly, and are certain of its importance.

Many respondents have been making efforts to improve culture, with some success, with 47% saying there had been an effort to improve culture, with moderate success.

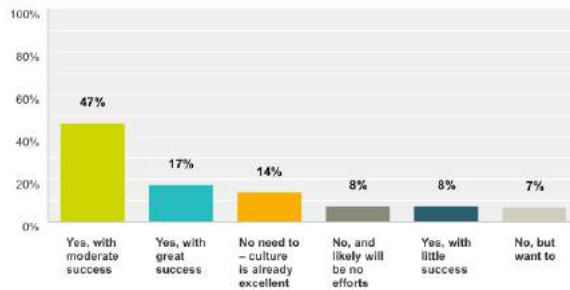
Culture also showed strongly in topic requests for speaker series, coming in at #3 overall, with 40% of respondents expressing interest.

Strategic Steps: Give Cultural Help where Needed and Grow a Reputation of Cultural Excellence

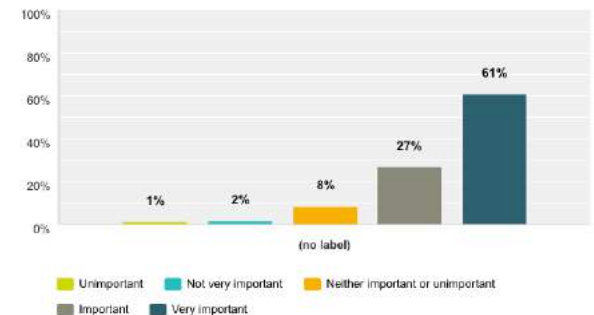
Culture is essential to businesses, and the results of the survey back that up. Respondents ranked their culture well, but are always looking to improve it.

With such a topic of interest, exploring cultural workshops, wellness programs and culture coaching can be a long range opportunity to create a reputation of incredible business cultures to draw talent in the City of Dublin.

Q33: Have there been efforts to improve your culture?



Q34: How would you rate the importance of culture to your company?



INSIGHT PYRAMID FOR CULTURALLY SUCCESSFUL

Culturally Successful

#208 Investing in employees helps them invest in you back.

#249 Establishing a clear culture determines what type of people will work with you and for you.

#262 Companies have created "culture guilds" to help control culture as new employees are hired.

#202 People leave their current company because they feel like a number, not like a valued person.

#238 With the right training in place, people with the right personality flourish. (step by step training)

#248 The mission of a company determines its culture. Companies without clear mission won't have clear culture

#69 People want to be valued. They want to feel like they are going to be rewarded.

#10 If you have the right people, the right development will take place



Recruiting & Retention Insights

NEW TALENT NIGHTMARE

NEW TALENT NIGHTMARE

Insight: There is an Alarming Scarcity of New, Capable Talent.

As suggested in previous insights, businesses have extreme difficulty in recruiting the right talent. Common sense would suggest focusing on recruiting from the local area, engage with local universities, and take advantage of Dublin's appeal as a great place to live and work. The problem with this strategy is that Dublin businesses have an extremely difficult time finding local talent to hire.

Secondly, many companies struggle with navigating visa requirements as a significant portion of the Columbus Region's IT community are not permanent residents of the United States. Visa requirements cause more of an issue for the small to medium sized companies as allocating the time and resources for following procedures can be daunting.

To address the challenges discussed above, many businesses have rethought their internship programs. Increased focus on connecting local, emerging talent, even as young as high school, has helped both identify potential hires, as well as develop brand loyalty to a particular company that may carry through schooling until a job offer is necessary.

Companies would benefit from rethinking ways to create new talent pipelines.

Strategic Opportunity: Focus on Engaging Sooner and Communicating More.

The City of Dublin and its businesses could benefit from implementing an organized, city-wide internship program to offer both students and employers an opportunity to gain access to one another and create new connections to help address employee recruitment challenges.

NEW TALENT NIGHTMARE

Survey Findings: High School Opportunity

The difficulty of recruiting new talent was not quite as great as expected, but still significant, with 41% rating it as “difficult” or “very difficult” to recruit talent from college or high school.

College internships were prevalent, but only 15% of tech companies offered high school internships. Low high school internship is likely linked to a difficulty in navigating liabilities, class schedules, and various other challenges, however, the benefits of finding ways around these obstacles can lead to long-term advantages and the potential for new talent pipelines.

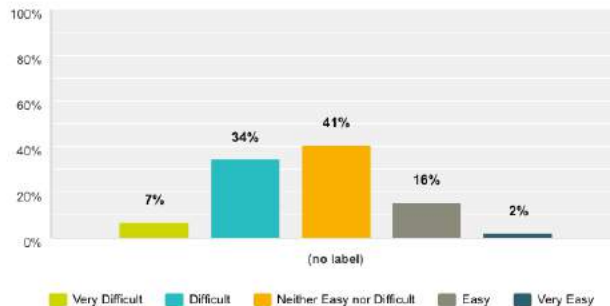
The difficulty of recruiting rises dramatically after the new talent phase, with 68% rating it “difficult” or “very difficult” to find talent above entry level.

Strategic Steps: Boost the Local Talent Pool, and Dublin’s Education & Businesses Collaboration Reputation.

By focusing on educational programs, we can boost both our new talent pool and homegrown pool of senior talent. Next steps for this would include:

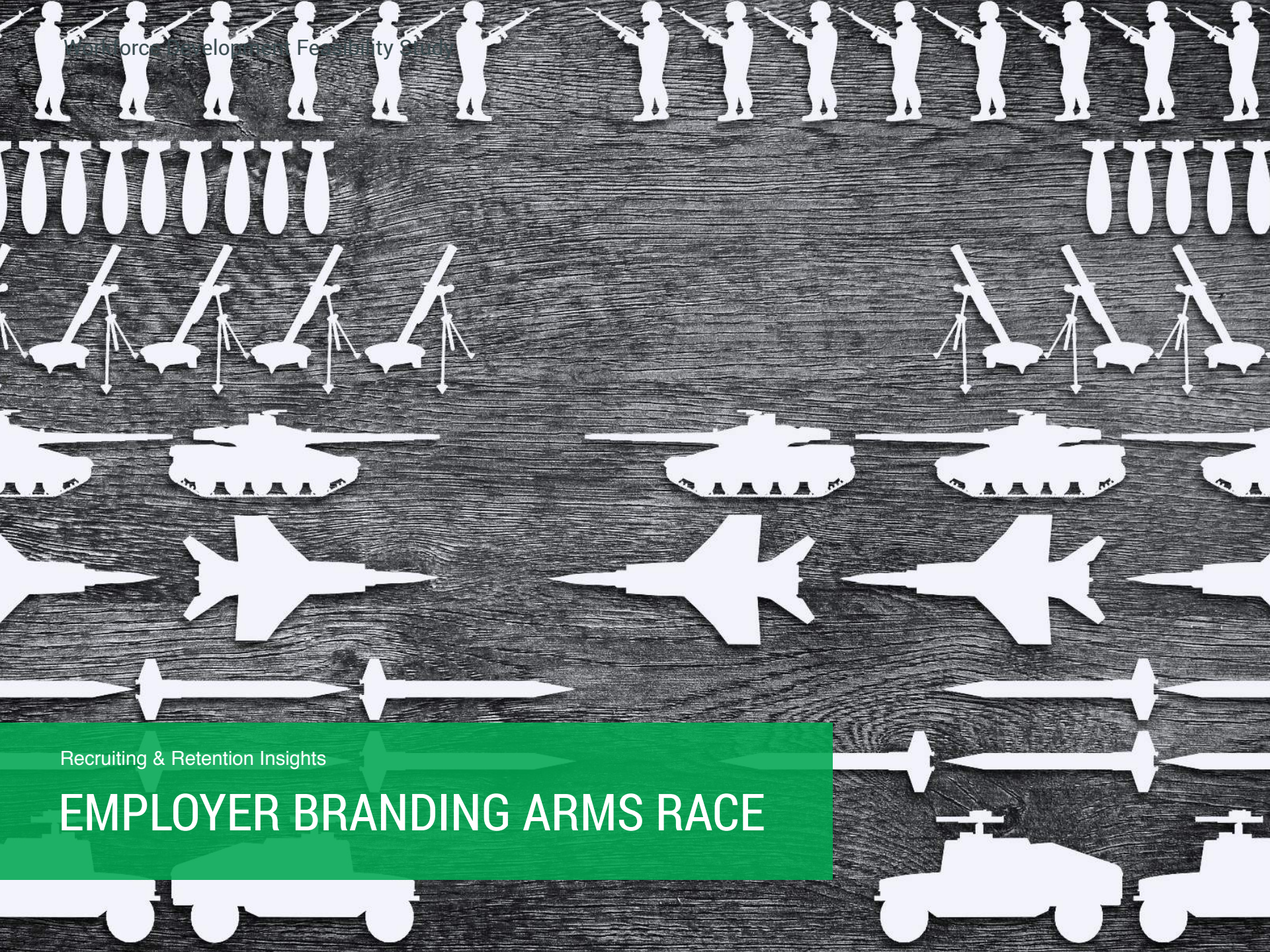
1. Reaching out to companies who have implemented successful internship programs (as a way to share and learn from one another).
2. Collaborate with Dublin Schools, Tolles Career and Technical Center, and area companies to explore the possibility of creating a curriculum for students alongside local businesses.
3. Host career fairs for Dublin high school students to increase exposure to tech career opportunities earlier in their education.

Q8: How would you rate the difficulty of identifying and recruiting talent from college and/ or high school?



INSIGHT PYRAMID FOR NEW TALENT NIGHTMARE





Recruiting & Retention Insights

EMPLOYER BRANDING ARMS RACE

EMPLOYER BRANDING ARMS RACE

Insight: From Employee Beware to Employer Beware.

As we've discussed, finding new capable talent can be challenging for employers. And, if and when they do find talent, keeping them can be even more challenging. Because good talent understands they are in demand, they've begun to take advantage of employers. These highly sought-after employees are commanding Bay Area salaries, flexible working situations, and new benefits packages.

The power of the employee and the overall struggle to keep and retain strong talent has prompted what we are referring to as an "Employer Branding Arms Race." Many employers are doing everything they can to boost their image as an attractive place to work: offering free soda, modern offices, high-end salaries, and even in-office bars to keep their valued employees happy and feeling appreciated.

Employers also noted the importance of thinking about and acting on company advertising and branding. Just a few years ago, this was not something many tech and healthcare companies realized the importance of. Now, with the struggle to find good talent, businesses are looking for ways to get the word out that they have good paying jobs with great opportunities for the right employee. We found this to be especially true for small to medium sized businesses.

Strategic Opportunity: Embrace the Age of Powerful Employees.

Dublin would benefit from finding ways to work with employers in designing employee-centric benefit programs that may feature increased employment flexibility, more educational opportunities, and an employee friendly atmosphere right here in the Midwest.

EMPLOYER BRANDING ARMS RACE

Survey Findings: Conflicting Results

Only 10% of IT respondents said it was either “difficult” or “very difficult to retain current employees, with 62% saying it was “neither easy nor difficult.” We are unsure of the reason for the low numbers but believe the difficulty is being understated, based on qualitative and literature review. It is possible the difficulty of finding new employees overshadows the task of retaining current employees. These results suggest the need for further quantitative research.

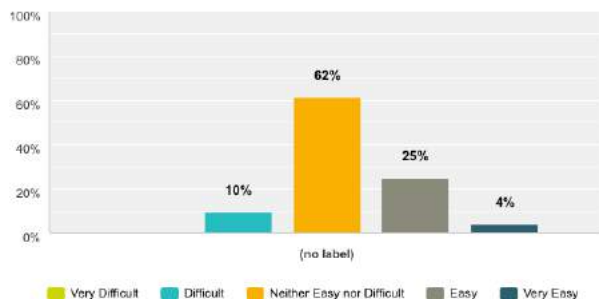
People did struggle with tailoring benefits programs, with 33% saying it was “difficult” or “very difficult” to tailor benefit programs to attract or retain employees.

Strategic Steps: Give Support in Tailoring Benefits and Wellness Programs.

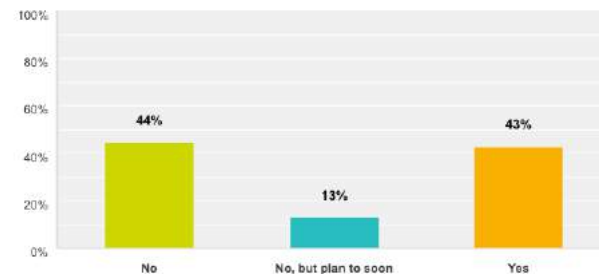
Providing resources to guide Dublin businesses as they tailor their benefits and wellness programs could be a great benefit to the business community.

Additionally, the conflicting results of the qualitative study suggest the necessity for additional research into the difficulty for employers to retain current employees.

Q11: How would you rate the difficulty of retaining current employees? (IT Responses)



Q36: Do you currently have an employee wellness program at your company?



INSIGHT PYRAMID FOR EMPLOYER BRANDING ARMS RACE

Employer Branding Arms Race

#22 Companies want an avenue to broadcast why they are great.

#33 Companies are highly interested in the City of Dublin driving awareness of the tech opportunities within the city.

#66 Companies need a way to connect with people.

#17 Recruitment is either luck or done by an outside firm.

#316 "a lot of it's just getting our name out there to those universities."

#13 Visibility is an issue from both the worker and employer perspective.

#257 So, again, from the city's standpoint, I would look for ways to leverage Ohio University, companies like Cardinal Health, and maybe even start-ups or start-up environments to try and leverage what Ohio University is doing, to kind of create more of that health care technology mix.

#335 I think that one of the things that I've seen with lots of training programs and workforce development programs is you need two fundamental things at the beginning, awareness and access.

STRATEGY CONSIDERATIONS

| Implement Strategic
Tactics for Immediate
Success and Local Impact

| A Long-term Strategy for
Regional and National
Impact

| Further Align with
Columbus 2020

04

STRATEGY OPTION 1

SUPPORTING DUBLIN'S BUSINESS COMMUNITY FOR LOCAL IMPACT

STRATEGIC STEPS

Immediate Strategic Tactics to Achieve a Long-term Vision

These tactical options propose a low risk to participants and the City of Dublin, yet they can yield tremendous long-term payoff. The main benefit for a tactical approach is to support specific discussions with small businesses. They also serve to act as points of emphasis or “reasons to believe” in Dublin’s overall commitment to workforce development.

The Vision: Make Dublin a Midwest IT Magnet

1. Create Dublin Speaker Series: Leverage Dublin’s thought leaders by facilitating discussion to help meet immediate needs of local businesses. Prioritized topics for the speakers series are listed below. Additional topics can be added as the speaker series becomes established.

- **Culture improvement and training:** Create reputation of incredible business culture in Dublin.
- **Talent recruitment and retention:** Assist companies with talent retention, recruitment, and professional development.
- **Additional topics yet to be determined.**

2. Pilot Soft Skills Workshops: Address the topic that is top of mind for many Dublin companies, and pilot training methods to help bridge the soft skills gap.

3. Explore Cost Mitigation Strategies: Focus on the top 3 certifications and training providers: Microsoft, VMWare, and Cisco.

Top Topics of Interest (Q38)

All Respondents

1. Soft Skills
2. General Business Topics
3. Culture
4. Collaboration Techniques
5. Employee Training & Retention
6. Security Topics
7. Internet of Things

IT Respondents

1. Security Topics
2. Soft Skills
3. General Business Topics
4. Internet of Things
5. Employee Training & Retention

STRATEGY OPTION 2

PLACE
BRANDING
FOR THE CITY
OF DUBLIN
FOR REGIONAL IMPACT

PLACE BRANDING FOR THE CITY OF DUBLIN

A Long-term Strategy for Regional and National Recognition

Place Branding involves digging deep into the DNA of a town—otherwise known as its Identity—and leveraging the strengths this identity presents as a way to communicate what a community truly stands for and believes in. Place Branding (not to be confused with Dublin’s current visual identity or visual guidelines) offers the opportunity for Dublin to strategically focus on an ownable idea in the minds of current and future residents.

Successfully branding the City of Dublin will differentiate it from peer communities. Although it's necessary to be at par on multiple city offerings (school, business, life), the strongest brands recognize the need to focus on a single idea supported by only a small set of strong attributes or services.



There is everything to be gained, not by reproducing the past and what the town once was, but by reinventing it on the basis of the values, competencies and ideals that have moved it throughout its history.

~J.N Kapferer on Towns as Brands

STRATEGY OPTION 3

**FURTHER
ALIGN WITH
COLUMBUS
2020
FOR NATIONAL IMPACT**



FURTHER ALIGN WITH COLUMBUS 2020



Leverage Partnership with Columbus 2020.

Statistics from the Columbus 2020 website suggest the regional branding strategy has been a tremendous success. The organization's efforts have brought 130,000 jobs to the region, substantially increased the amount of capital investment, and raised personal income. With that being said, research also indicates companies are still struggling with finding the right talent and plugging into the right talent pipelines.

Quotes like, "Recruiters have to "sell" Columbus/Dublin as a great place to live and it's not an easy task," and "One of the greatest hurdles (selling Columbus)," indicates that cities surrounding the region may not be completely united under the common ColumbUS strategy. A lack of community unity around the message of the campaign can explain why its companies continue to struggle with recruitment and retention.

It will be important for the Central Ohio community to strategize together on how they would like to adopt the message of

Columbus 2020 in a more strategic way. Or, pursue other strategies that they feel might be more impactful. In either instance, it's crucial the Central Ohio region unify under a common strategy as a way to recruit and retain more talent.



It's crucial the Central Ohio region unify under a common strategy...



THANK YOU!

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