



Business Regional Advisory Board

Accounting/Business Management & Entrepreneurship/ Marketing & E-commerce



DATE : November 15, 2019

LOCATION:

CISCO
130 Theory #100
Irvine, CA 92617

TIME:

8:30 am TO 2:00 pm
Doors open at 8:00 am

Our funding agency is requiring attendees to sign in and out!

CTEoc District Members: No Charge
Non CTEoc District Members: \$150.00

Contact Vital Link for cost information:
(949) 646-2520 / Aurea@vitallinkoc.org

PLEASE RSVP BY November1, 2019!

Industry Panel Discussion Items

- Emerging trends and changing standards in the industry
- New materials, products or workplace methods being developed
- Current and future job market in Orange County
- Skills alignment with entry level positions
- The most important job skills wanted in an employee
- Weaknesses in skill sets of current job applicants
- The level of in-house training available in the industry

Resource Information Provided

- Sample job descriptions
- General salary information
- Industry trends

ROP Instructors Register Through the Link Below.

Coastline ROP
RSVP to:
Tammy Iversen
(714) 429-2244
tiversen@coastlinerop.net

NOCROP
RSVP to:
Jennifer Stead
(714) 502-5800
jstead@nocrop.us

CTEp
RSVP to:
Please RSVP through the
[registration link.](#)

High Schools and Colleges:

[RSVP HERE](#)

Contact:
Aurea Lawson
CE Coordinator
Aurea@vitallinkoc.org
949-646-2520



CTEoc Leadership Committee

- Kathy Johnson – VL
- J. S. Coke – Co-Chair
- Raquel Requena Ramirez – Co-Chair
- Elizabeth Arteaga
- Dorsie Brooks
- Myra Clarke
- Kenia Cueto
- Marilyn Cunneen
- Israel Dominguez
- Dana Encheff
- Tracy Foreman
- Lisa Green
- Raine Hambly
- Kari Irwin
- Jillian Johnson-Sharp
- Nancy Jones
- Merry Kim
- Lisa Knuppel
- Sara Kong
- Megan Labare
- Veronica Lew
- Grant Litfin
- Martha Payan-Hernandez
- Scott Reindl
- Raquel Requena-Ramirez
- Kathleen Reiland
- Alita Salazar
- Lorraine Sanchez
- Marianne Schaeffer
- Kim Thomason
- Debra Vanschoelandt
- Michael Vossen
- Paul Weir
- Annie Younglove

School Districts

- Anaheim Union
- Brea Olinda
- Fullerton Joint Union
- Garden Grove
- Huntington Beach Union
- Irvine
- Laguna Beach
- Los Alamitos
- Newport-Mesa
- Orange
- OC Dept. of Education
- Placentia-Yorba Linda
- Saddleback Valley
- Santa Ana
- Tustin

Regional Occupational Programs

- OC CTEp
- Coastline
- North Orange County

Community Colleges

- Coastline
- Cypress
- Fullerton
- Golden West
- Irvine Valley
- NOCE
- Orange Coast
- Saddleback
- Santa Ana
- Santiago Canyon

A Program of:
Vital Link Orange County



Business, Accounting, & Marketing

Regional Advisory Board

Friday, November 15, 2019

CISCO 130 Theory #100 Irvine, CA 92617

Educator's Agenda

8:30 – 9:00 am

Registration/Networking

9:00 – 9:15 am

Welcome

9:15 – 9:20 am

Regional Director: Cathleen Greiner

Updates from the Regional Director

9:20 - 10:30 am

College Panel:

- *Focus: Programs/Certificates/Pathways*

10:30 - 10:40 am

OC COE

10:40 – 10:45 am

Break

10:45 – 11:30 am

Industry Panel

- *Focus: Trends, Soft Skills, Recommendations*

11:30 – 11:40 am

Break

11:40 – 12:40 am

Break-out Session

- *Business - Rm #. Main Room (Laguna 1 & 3)*
 - *Focus: Technical Skills/Job Requirements*
 - *Employer Support*
- *Accounting - Rm #. Bolsa Chica*
 - *Focus: Technical Skills/Job Requirements*
 - *Employer Support*
- *Marketing - Rm #. Balboa*
 - *Focus: Technical Skills/Job Requirements*
 - *Employer Support*

12:40 – 1:10 pm

Lunch/Networking

1:10 – 2:00 pm

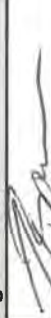
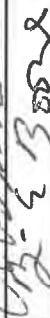













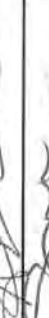
PLC Speaker: Rand Brenner







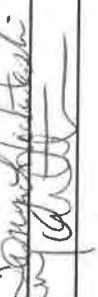

Licensing Consulting Group



Business, Accounting, and Marketing Regional Advisory Board @ CISCO

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High Schools		Last Name	First Name	School	District	Title	E-Mail	Time Out	Signature
1	Bammer	Joshua	Edison HS	HBUHSD	CIBACS Teacher	jbammer@hbuhsd.edu	2:05		
1	Barro	Mary	Edison HS	HBUHSD	Teacher	Lbarrros@hbuhsd.edu	1:04		
1	Boone	Brian	Edison HS	HBUHSD	CIBACS/CTE Teacher	bboone@hbuhsd.edu	2 -		
1	Bronkar	Jason	Edison HS	HBUHSD	CIBACS Teacher	jbronkar@hbuhsd.edu	2:05		
1	Chan-Nauli	Melissa	HBUHSD District	HBUHSD	Special Programs Administrator	mchan-nauli@hbuhsd.edu			
1	Chlarson	Lori	Edison HS	HBUHSD	CTE Instructor	lchlarson@hbuhsd.edu	2:05		
1	Cooke	MJ	District Campus	AUHSD	AIME Director	cooke_m@auhsd.us			
1	Cunneen	Marilyn	HBUHSD District	HBUHSD	CTE Facilitator	mcunneen@hbuhsd.edu	2:05		
1	De Stefano	Chris	Edison HS	HBUHSD	Teacher	cdestefano@hbuhsd.edu	2 -		
1	Duran	Sylvia	Rancho Alamitos HS	GGUSD	CTE Business Teacher	sduran@ggusd.us	1:15		
1	Emerson	Lorena	Fountain Valley HS	HBUHSD	Teacher	lemerson@hbuhsd.edu			
1	Foreman	Tracy	HB Adult School	HBUHSD	CTE Dept. Coordinator	tforeman@hbas.edu			
1	Gasinski	Beau	John F Kennedy HS	AUHSD	Business/CTE Teacher	gasinski_m@auhsd.us			
1	Hayden	Kathe	Marina HS	HBUHSD	Teacher	khayden@hbuhsd.edu	2PM		
1	Head	Bill	Gerald P. Carr Intermediate	SAUSD	CTE/STEAM Teacher College and Career Readiness	bill.head@sauusd.us			
1	Heron	Holly	CTE	GGUSD	Counselor	hheron@ggusd.us			
1	Hirst	Sheridan	Newport Harbor HS	NMUSD	Teacher COUNSELOR/WORK BASED LEARNING	shirst@nmusd.us			
1	Hurtado	Oswaldo	Cypress HS	AUHSD	Coordinator	hurtado_o@auhsd.us	2:00pm		
1	Jarjoura	Rola	GGUSD	GGUSD	CTE Teacher	rolajarjoura@att.net			
1	Kong	Sara	PYLUSD	PYLUSD	Counselor on Special Assignment	skong@pylused.org	2:05		
1	Madrid	Albert	Valley HS	SAUSD	Teacher	albert.madrid@sauusd.us	2:00		
1	McCance	Sarah	Fountain Valley HS	HBUHSD	Teacher	smccance@hbuhsd.edu	1:10		
1	Park	Judy	TUSD	TUSD	Counselor on Special Assignment	jpark@tustin.k12.ca.us	1:00		

Last Name	First Name	School	District	Title	E-Mail	Time Out	Signature
1 Peterson	Carrie	Marina HS	HBUHSD	CTE Teacher	cpeterson@hbuhisd.edu	2:15	
1 Ross	Jason	HBAS	HBUHSD	Assistant Principal	jross@hbuhisd.edu	1:20	
1 Rybaczyk	Laurie	Corona Del Mar HS	NMUSD	Counselor	lrybaczyk@nmusd.us	2:00	
1 Santiago	Joanna	Valley HS	SAUSD	CTE Instructor	joanna.santiago@sausd.us	2:00	
1 Scanlon	Brian	Valley HS	SAUSD	Teacher	brian.scanlon@sausd.us	2:10	
1 Strachan	Robert	Edison HS	HBUHSD	Teacher	rstrachan@hbuhisd.edu	2:10	
1 Tukia	John	Marina HS	HBUHSD	Guidance Specialist	jtukia@hbuhisd.edu		
1 Whiteside	Tonya	Aliso Niguel HS	CapoUSD	Teacher	twhiteside@capousd.org	2:10	
1 Whitmore	Matthew	Edison HS	HBUHSD	CIBACS Teacher	mwhitmore@hbuhisd.edu	2:10	
1 Yap	Alberto	Orange HS	OUSD	Teacher	ayap@orangeusd.org		





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NOCROP									
Last Name	First Name	School	District	Title	E-Mail	Time Out	Signature		
1 Cueto	Kenia	NOCROP	NOCROP	Business Partnership Manager	kcuetto@nocrop.us				
1 Hernandez	Esmerelda			ROP Instructor					
1 Hernandez	Lupe			Instructional Programs Manager					
1 Kairis	Gail	NOCROP	NOCROP	Admin, Instructional Programs	gkairis@nocrop.us				
1 Kough	Jamie			ROP Instructor	jkough@nocrop.us				
1 Prado	Jenn	NOCROP	NOCROP	Adult CTE Programs Manager	jprado@nocrop.us				

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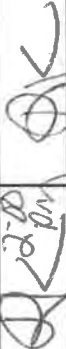
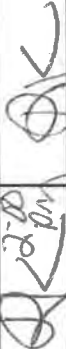



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CTEP									
Last Name	First Name	School	District	Title	E-Mail	Time Out	Signature		
1	Damon	Susan	Richland HS	Teacher	sdamon@orangeusd.org	8:30			
1	Duran	Sylvia	GGUSD/CTEp	CTE Business Instructor	sduran@ggusd.us	8:00			
1	Escala	Julie	OCDE	Instructional Programs Assistant	iescala@ocde.us	9:20			
1	Foss	Joyce	OCDE	Curriculum Specialist	jfoss@ocde.us				
1	Foster	David	OCDE	Career Education	dfoster@ocde.us				
1	Kubes	Christina	GGUSD	Curriculum Specialist	ckubes@ggusd.us	8:00			
1	Weir	Paul	OCDE	Coordinator. CE	pweir@ocde.us				

NOT
w/ CTEP

Business, Accounting, and Marketing Regional Advisory Board @ CISCO

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Coastline ROP		Last Name	First Name	School	District	Title	E-Mail	Time Out	Signature
1	Asrar	Hasan		University HS	IUSD	Coastline ROP Specialist	HasanAsrar@iusd.org		
1	Keating	Roger		Ocean View HS	HBUHSD	Teacher	rkeating@hbuhsd.edu		
1	Shafer	Todd		Westminster HS	HBUHSD	ROP Teacher	tshafer@hbuhsd.edu	2:00 PM	
1	Suzer	Gurkan		Trabuco Hills HS	SVUSD	Teacher	Gurkan.Suzer@svusd.org	2:10 PM	
1	Volo	John		Ocean View HS	HBUHSD	Teacher	jvolo@hbuhsd.edu	2:10	






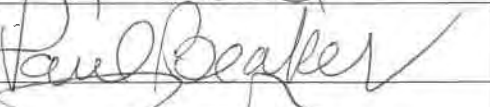


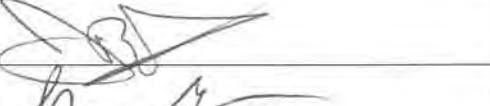






Colleges								
1	Snow	Margie	Coastline College	CCCD	Adjunct Faculty	masnow@chartner.net	1.5	<i>Margie Snow</i>
1	Tchaikovsky	Bennet	Irvine Valley College	SOCCCD	Dept Chair	btchaikovsky@ivc.edu		

Orange County Regional Advisory Board

Business/Marketing/Accounting

Friday, November 15, 2019

My signature below signifies that I agree to serve as an Orange County Regional Advisory Committee Member for 2019-20.

Name	Company	Signature
James Haynes	Haynes & Associates, CPA	
Alvin Fong	Cie	
Richard Carroll	CoAdvantage	
Paul Beakes	ERM Insurance Brokers	
Rand Brenner	Licensing Consulting Group	
Jessica Martini	Southwest Airlines	
John Dade	High Ridge Futures, LLC	
Steve Getman	Insignia Industries	
Nina Steffen	NRS Marketing Solutions	
Patti Larson	SunUp Group	
Alexander Elliott	AW Elliott & Associates	
Nicole Cox	Ernst & Young	
Sanjay Dalal	oGoing	

Business/ Marketing/ Accounting Regional Advisory Board

College Panel

Friday, November 15, 2019

Cisco Systems

130 Theory, Suite 100, Irvine, CA, 92617

College Representatives

Samreen Manjra, Accounting Instructor, Cypress College

Barbara Hawksley, Professor, Golden West College

John Russo, Business Faculty, Irvine Valley College

Arabian Morgan, Professor, Orange Coast College

Donald Bowman, Department Chair of Accounting, Saddleback College

Steven Deeley, Business Professor, Santiago Canyon College

Regional Resource Representatives:

Cathleen Greiner, Regional Director, Business and Entrepreneurship

Jacob Poore, Research Analyst, Orange County Center of Excellence

Kathy Johnson, President, Vital Link: I want to introduce to you, Cathleen Greiner, our Regional Director for the Business and Entrepreneurship.

Cathleen Greiner, Regional Director, Business and Entrepreneurship: I am going to talk about workforce development, employability, academic preparation and community building.

- Regional Directors and state wide directors, in California and we have our Chancellor's Office for the California Community Colleges providing support for this sector.
- A lot more of our students end up coming to the community colleges, increasingly by higher percentages, over the last several years. More students are coming from the high schools directly into the community colleges and through dual enrollment opportunities.
- Have you heard about the K through 12 Strong Work Force program? We all now work under that same grant and the focus again is both on career preparation, but also academic preparation and those 2 pieces go hand in hand as our students prepare for and enter the economy.
- We also talk about the disruptive economy. The report from the Orange County Business Council is called Dimensions of Defensibility Human Centered Design in an Automated Workplace. This is information about the kinds of characteristics and preparation our students need to have as we get into 2020. Disruptive economy, what that means in terms of workforce development and workplace preparation. I can partner consult work with all of you in the areas that I mentioned.
- What do Regional Directors of Employment and Employer Engagement do? The connection between business and employers, we serve as that bridge between the community colleges, education and business. We focus on enrollment. Labor Market is absolutely essential because as we know what kinds of openings there are in the various sectors; business and entrepreneurship being the biggest one right now with over 19,000 openings in Orange County. We have great opportunities for our students to engage in business.
- I also focus on networking. I have talked with some of you this morning about providing judges for various competitions, working with high schools, Unified School Districts, our

community colleges so that you have just in time information but access to both small, medium and large employers so that your students can gain internship.

- Skill building and upskilling for students as well as employees and finally building those types of industry partnerships that lead to clinical experiences and as I said internships as well.
- Also, aligning curriculum efforts and we had a meeting earlier this fall where both the Unified School District folks as well as the community colleges talked about having a stronger alignment between the curriculum at the high schools running right into the community colleges and for us to partner more strongly with, for example Cal State Fullerton.
- If you are interested in being part of that collaborative we are going to start that in spring of 2020.
- How do we tighten that guided pathway so that we can increase the proof that I was talking about and meet the demands here in Orange County?
- Changing dynamics of the workforce seems to be more and more into elements of the economy and the side hustle. We are learning all of that and it is important for us to be aware of the employability skills that are required for that.

Samreen Manjra, Accounting Instructor, Cypress College: I am also the co-advisor for our Business Club on campus, I serve on the Professional Development Committee, I attend the Planning and Budget Committee and I am on the Scholarship Committee.

- In our accounting program we have most of our students focusing on the AST in business. We are currently in the process of revamping our AS in accounting as well as our accounting certificate to include new classes in ethics accounting as well as QuickBooks.
- We offer support to our students through supplemental instruction. We have 2 leaders that provide sessions 4 days a week for an hour and a half; we also have 4 to 5 accounting tutors that also provide support to our accounting students.
- We also provide our students with an annual accounting career day. This year we had 6 speakers and we had about 12 different organizations, we had about 175 students attend our annual accounting career day.
- We provide our students with an alumni panel so that way students who transfer, can come back to our campus and share with our current students how they are doing, what are some tips for success at the 4 year institution.
- We also offer an internship through the Cypress Chamber of Commerce. For our management and marketing program we also have most of our students focusing on our AST in business.
- We offer certificates in small business management, marketing, retail management, and social media marketing.
- We provide our students every semester with an opportunity to participate in the Shark Tank business pitch competition; with our CIS and also computer science department we have a lot of our students focusing on the AST in business but we also offer an AS in CIS.
- We will be offering a new AST in computer science. We also have an AS in cyber defense, and we have a very active cyber security club on campus.

Barbara Hawksley, Professor, Golden West College: I am in the business department where we have accounting and business administration.

- For our accounting department we have the Associate of Arts degree. We have the IRS enrolled agent certificate of specialization.
- With the management we focus on the small business development as well as entrepreneurship.
- We have the entrepreneurship small business startup. We have 2 levels of that as well as an Associate of Arts degree in marketing. We have had our business departments, highest awarded associate transfer degree enrolled in West College last year when we had almost 70 students graduating with an ADT.
- We just started with an entrepreneurship a dual enrollment program with the Huntington Beach Union High School District. We have 40 students enrolled at Huntington Beach and Fountain Valley High Schools and we also have students from the surrounding high schools attending those courses.
- Some of our new upcoming offerings include a true business degree. We are focusing on international business. We have an advanced transportation and logistics director stationed at Golden West focusing on a logistics program within the business department; the focus is on international business.
- We also have up and coming, 2 noncredit certificates, in the area of the California Tax Education Council. We are applying to be a provider for them so that students can actually go ahead and be certified on the tax accounting.

John Russo, Business Faculty, Irvine Valley College: I'm in the entrepreneurship and management department.

- In our division we currently have 6 different disciplines, CIM or Computer Information Management system. Have a strong cybersecurity, we have held many of the competitions on campus ranging from junior high up; we have a number of 8th-9th graders that are part of that program taking the CIM classes in the evenings.
- We also have a real estate program, a paralegal program, and accounting, entrepreneurship, and management programs.
- In our business/management, we offer a number of degrees and certificates. The AST, the transfer degree, we also have business management. We have retail management as well, that are some of our big focuses. We honor over 300 degrees in the business area each year, we have one of the highest degrees earned in the school that is from business department.
- In terms of entrepreneurship, our program consists of 13, 8-week classes, 1 and 2 units. We have a couple of 3-unit classes that are transferable. Our short classes are designed for those that are ready to start a business, are thinking about starting a business down the road, maybe somebody who wants to learn how to write a business plan, understand the business model canvas, get a taste of accounting for entrepreneurs and so we have structured it in a way where they can earn certificates within either a semester or a year because we have 3 classes to take to earn a certificate. We have stackable certificates in the entrepreneurship department.
- We also have dual enrollment, currently working with 3 high schools in the entrepreneurship area in the Tustin and Irvine Unified Districts; where we have created classes one of them being a UC Cal State transferable class, in Intro to Business. We teach that in the fall and in the spring, we teach a combination of 3 of our entrepreneurship classes that will earn them a certificate.
- These are a pathway leading into IVC, Intro to Management and Intro to Business class kind of leads them into the pathway to be able to take business management or maybe even the AST.

- High schools are seeing the value in taking college classes as opposed to the AP classes.
- Business has not really been offered and many cases you get some of your econ that you have to take but entrepreneurship starting a business, the creative thinking, the entrepreneurial mindset is something that seems to be in high demand at the high schools.
- We are currently working with one of the new high schools that is being built in Tustin Unified TIDE so we are working with them in developing that program and offering some of our classes there as they develop their curriculum from an entrepreneurial standpoint.
- We put on our 1st pitch competition last spring. One of the things that we are focusing on is this concept that having an entrepreneurial mindset and being an entrepreneur does not just mean business. It is cross discipline and you might be a biologist, a hairdresser or a dancer and you have an idea for something that can lead to entrepreneurial opportunities and so we open it up cross discipline. We had our top 10 that presented to industry judges and panelists and they got great feedback and our top winner won \$1,000. That award actually went to one of our dual enrollment high school students. We opened it up to those high schools and he did a great job and he ended up winning the \$1,000. We have more of those competitions that we are going to be planning again in the spring.
- We also have involved our students with competitions out in the community. NACE, National Association Community College Entrepreneur, conference was just here. One of the IVC students was part of that and got the opportunity to pitch there and did very well.
- Orange Coast College just hosted a pitch competition for the entrepreneur organization, the Global Student Entrepreneur Awards and we involved our students. I want them to see and understand what goes on in the entrepreneur community.
- Last year we offered an entrepreneurship industry certification through Certiport; students can take this industry certification test, earn badges and a certificate that is industry recognized.
- We are looking at getting some of the entrepreneurship classes to be general education, as we talked about the entrepreneurial mindset I know some colleges are using the ELI, Entrepreneurship Learning Institute, to become part of the general education path. We are looking at the importance of that entrepreneurial mindset and that is the focus of that class.
- Our retail management certificate, we are part of the Western Association of Food Chain. We have an advisory board meeting 2 times a year where we collaborate with some of the major grocers; they offer industry certification that ties into the retail management certification. This is required for many of their employees to get into management through the grocery industry, we are looking to expand that into other retail not just grocery but that is a very strong certificate.
- Our Business Leader Society on campus has been doing a lot of great events between workshops, pitch competitions, we have guest speakers come in. We have an active group on campus.

Arabian Morgan, Professor, Orange Coast College: I am an accountant faculty member and currently the scheduler for our division of business, accounting and computer science classes.

- We have an honors business law class. Along with that we begin a mock trial club which is a little new for us but we are trying to get students interested in different aspects of law and so this is one way we are doing it.
- We have an accounting society where students get together in the area of accounting, we have some exciting speakers that come in and help us with that.

- We have internship opportunities through our career center with our students and our faculty member's sponsor and help participate in that. We have one sponsorship and are working with Kathleen Greiner, through a faculty member that is supporting a student doing an internship.
- We offer a variety of certificates in our business and accounting classes: marketing, leadership, entrepreneurship, real estate and these are primarily certificates of specialization but they can lead to certificates of achievement as well.
- In accounting we have several certificates that we offer. Certificates of specialization which include payroll, cost accounting, individual as well as corporate tax planning.
- One of the things that we are doing, as we are elevating our student correction certificates of specialization into certificates of achievement so that these will go on their college transcripts.
- We have a business pitch competition called Pirate's Plank, similar to the Shark Tank. We have a number of screeners going through all of the panelist's presentations just to see which ones we are going to showcase on our night.
- We are focusing on getting students on different pathways but we want to make sure that they are able to get certificates of achievement moving forward just so it is noted on their college transcripts for any employer to see.
- Finally, we have our biggest transfer program with our AST in business, we continue to support our students and for them not only transferring but being successful once they get to that 4 year institution. We are working with Fullerton and Long Beach and a few of the other schools like SC and UCLA just to make sure that they are training them appropriately at OCC.

Donald Bowman, Department Chair of Accounting, Saddleback College: We offer about 10 certificates and Occupational Skills Awards, OSA. Certificates around 20 units and OSA is around 9 units, over the span of business leadership, entrepreneurship, global business, retail, marketing, human resources, project management focus.

- We have around 55 courses that overlap other areas such as applied manufacturing or others like culinary arts and entrepreneurship which crossover.
- We offer entrepreneurship accounting to individuals looking for basic accounting knowledge to take into their businesses.
- Exciting thing going on in business is we are reaching out and have established some college courses on high school campuses. This is a growing area. The next evolution of this is, college courses being offered to high school students but we want to get some of the high school instructors that meet the college minimum qualifications to be able to teach these courses. That is a growing area getting students in the high school level to actually move into the college.

Kathy Johnson: Are those inside or outside the bell schedule?

Donald Bowman: They are offered after school hours but they want to try to get them into the regular school time. That is the goal.

Kathy Johnson: And I would presume those would be with your direct feeder high schools?

Donald Bowman: Yes. As many of the other schools, we offer the core courses for transfer and also offer 3 certificates.

- The main certificate is a focus for those who need to come back and get additional accounting courses to qualify for the CPA exam, we call that our accounting specialist and it meets the minimum 24 unit requirement. We also offer additional courses so they can get to the 30 units, full requirement plus other courses that they may be interested in.
- We offer a computerized specialty program, geared more toward those that want to go out and start a bookkeeping business or that are already in some kind of personal accounting business and want to expand their skills; we focus on QuickBooks to get those skills up to speed.
- We have a tax specialist. Golden West, you were looking for a C Tax certification?

Barbara Hawksley: Yes, we are in the process of that.

Donald Bowman: To prepare taxes for fees in California you have to be either be California Tax Educational Council certified person, an enrolled agent, CPA or an attorney.

- Our sister school Irvine Valley College offers C Tax Certification, people who take that program can immediately go out and start preparing taxes for a fee if they pass the state test.
- We are focused more on an enrolled agent side, preparing students for the Federal tax exam and also to get some specialty tax courses for those that are getting ready to take the CPA exam. We have a robust accounting society. We focus it towards accounting but also general business and prepping people. We have CPA speakers come in, we have how to write resumes, how to interview for any kind of a business profession and it has been growing over the last 3 years.
- All colleges up here are part of Gap 4+1, it is in partnership with Cal State Fullerton. GAP means Guaranteed Accounting Program for 4 years and then plus one, which is entry into the Master's program.
 - This was a beta test started about 4 years with Irvine Valley College and Cal State Fullerton. Cal State Fullerton wanted to increase the quality of the knowledge and preparation of students entering the accounting program because there was quite a large dropout rate once students got into their 1st or 2nd junior level. This was to get people interested in the beginning and then prepare them not only in accounting but in business communications and different ways to interact.
 - It was so successful that Cal State Fullerton wanted to roll it out across the community colleges in South Orange County.
 - Cal State Fullerton is one of the top employers of accounting professionals in the Orange County, I believe everybody on this panel is part of this roll out. We have been meeting for the last 3 months, trying to put together consistency across the community colleges.
 - The cohort program where either Saddleback, Orange Coast, Cypress, Golden West, or Santiago we would bring in; each one of us would bring in a cohort of about 20 students.
 - They would be in the program for 2 years and those programs we are trying to set up would be consistent across colleges. Those students would stay together in all their classes. So when they go over to Cal State Fullerton and they go into the accounting program, they are not just blasted onto a big 4 year university campus, they already have some connections.
 - We are looking at possibly having a cross cohort event so not only the Saddleback students but they can meet all across the county so now there may be 140 students

moving onto the campus at one time that have a similar background and know each other.

- We are going to be reaching out to the high schools to sell them this program, the benefits and try to get those students that have an interest in finance or accounting; into a fixed program cycle that will carry them all the way through. At Cal State Fullerton if you have a 3.3 GPA in accounting, you automatically are admitted to their Master's program.

Steven Deeley, Business Professor, Santiago Canyon College: I am the Department Chair for Business and Computer Science. We offer a lot of the same certificates.

- We are very transfer focused; I am going to mention three really strong programs in our area.
 - The 1st is, we have an exceptional online real estate program. The last couple years they have been ranked in the top five nationally.
 - The past year in conjunction with local companies, we established a program, training students in enterprise resource planning the software. They are finishing up their 2nd semester. It is a small group at this point, but I think almost all of them have job offers.
 - Lastly, this spring we are starting a program in industry robotics.

Kathy Johnson: When we think of real estate most people think of sales, at Santiago Canyon it goes beyond sales. They do property management. I know Alana has been meeting with individuals, not just regular residential property management, but homeowner association management, which is a new area that she is tapping into along with escrow and loans. It is a broad industry sector, beyond the sales.

Arabian Morgan: We have several of our business courses offered online such as marketing. We have some entrepreneurship and our real estate program is offered online. I believe you can get an entire certificate in real estate online.

- For our accounting programs we are going in the opposite direction of Saddleback. Our Accounting 1 class is online. We pulled our Accounting 2 back from the online program just to tighten it up a bit just to make sure that students are being more successful than they currently were being. For our evening classes that include cost accounting, income tax and payroll; those have been pulled to really just be in the classroom experience. Our sister school of Coastline, offer these courses online, we think we have a good dichotomy, we are okay with sharing.
- In our ethics class, we are rolling it out to be an online course this summer or at least hybrid in nature.

Q: Kathy Johnson: What is the ratio on the hybrid?

Arabian Morgan: In the hybrid classrooms we are looking at three hours, once a week, each class and maybe one hour online if needed beyond that.

John Russo: We offer a number of online classes in management, entrepreneurship and real estate.

- Most of our entrepreneurship classes were structured as hybrid this semester; they are 1 and 2 units, shorter classes, they would meet for about an hour and a half each week and then the other component of it is done online. It gives us a great opportunity to

collaborate, group activities, discussions; we looked at the enrollments and we try taking some of them fully online so we have seen an increase in enrollments.

- We have a number of high school students. I am teaching marketing right now online and I probably have 5 to 6 high school students in our feeder schools that are taking the class online.

Q: Kathy Johnson: Which marketing class is that?

John Russo: The Principles of Marketing, our introductory marketing class. We are seeing more and more. During the summertime there is a high enrollment of high school students in the Intro to Business class as well as in our Legal Environment. They like the opportunity to be able to get started with their college career. Many of them are doing okay. Some are seeing the rigor and getting a taste of what college is like and struggling, but the opportunity is there for them to start dual enrollment and get credits.

Barbara Hawksley: We offer many of our classes online particularly in the business department. Some classes like Business Communication, Intro to Business Writing; we offer as a hybrid, so that the students engage with each other in a face to face context. We found that has been very successful, especially in the evening time, we have high enrollment. The Intro to Business class is a very high enrollment class, during the winter intersession and during summer school. We also have a lot of the newly graduated high school students come in and take those classes, we see that as very successful.

Samreen Manjra: Our classes are mainly hybrid and in person. We do not offer many classes if any online. Our version of hybrid classes will vary in terms of the percentage in person versus the percentage online, we have not gone full online on any of our classes.

Steven Deeley: We offer just about everything online. Some of our hybrid classes for instance, our core accounting classes, are entirely online and they come on campus for the exams. Our programming classes are face to face.

Audience Member: With the online classes, are your students successful?

Kathy Johnson: Success rates and does it make a difference whether it is the high school student, or someone who is in community college, or someone who is coming back to college?

Donald Bowman: Focusing on the 2 core classes 1A and 1B Financial and Managerial, we see a pretty high drop rate in the 1A.

- Students who think accounting is going to be easy who do not have the discipline to stay current, they drop out and we see a lot of them come back and take it in person. For the 1B, the drop rate is low, and I think the reason is because if they successfully took 1A online, they are prepared and ready for 1B.
- I send information out 2 weeks before the semester starts and inform them on how much time they are going to have to take, given the weekly schedule; they do not have a chance to get behind. We have proctored exams. They have to come in and take. It is an articulation agreement with the 4 year colleges, I always ask a survey and I will have about anywhere from 75 to 100 students depending on the semester; overwhelmingly I would say in the 95 plus percent they all want that daily or every other day schedule.

They do not want everything due at the end of the week and I ask them why and they said it makes us stay on track. So that seems to be kind of the formula to help it be successful.

Kathy Johnson: Are they your traditional college age student or are they individuals who are already in the work force and they are coming back for new courses?

Donald Bowman: Mostly college students.

Steven Deeley: The perception of the online class is that they are easier. I think we are doing a good job of trying to change that perception. They are more challenging, you need more self-discipline.

- The way they structure the class, we have deadlines; we are procrastinators we will turn it in on the deadline. If you have everything due on that Sunday night that is when they are waiting so, if we spread it out I think that works well.
- The rigor is a little more challenging. One of the things that we really try to do with online is trying to make it more closely related to having that interaction with the instructor. Whether it be through videos, live webinars using our Zoom through Canvas and those tools are really trying to create that interaction that is the missing piece of the online and why many students do not like it.
- Some of the high school students that are taking the classes are the top high school students.
- Don had mentioned, a number of students will come in and take tests on campus yes so some of you may or may not know this but our learning management system Canvas, has a tool called Proctorio. It is a way of taking the exam but monitoring what they are doing and we can monitor their screen.

Kathy Johnson: And they know this?

Steven Deeley: Yes, it all has to be informed up front. It can monitor the room, head turns and it can monitor if you are going to other websites. A fully online class, they should not have to come to campus for anything; there are lots of discussions over that so if we are doing it fully online how do we monitor cheating and making sure the person is taking the test.

Kathy Johnson: The 15th college district that was going to be totally online, is not going to have that personal connection; has it had an impact on you? Do you see that as affecting or disrupting what you are doing at the community college level?

Donald Bowman: We have not seen an impact for Saddleback. We all offer online courses, some hybrid, some pure online. Coastline does an outstanding job because they are mainly an online focus, what I am hearing from my constituents is that this time we are not seeing an impact. Professionally and personally, I do not know exactly where that is going to go in the long-run and I do not know if anybody here is starting to prepare for anything there or if they have seen any impact.

John Russo: From my understanding of it, so far, I think we are not seeing a big impact because the number of classes and types of classes they are offering is very limited. They do not have accounting, marketing and entrepreneurship classes.

Arabian Morgan: OCC has not seen a drop off yet. I say yet because knowing that the business courses are not being offered now, especially with the accounting piece, you know if they find the instructors that are willing to use some materials that we normally would not use ourselves; we might see some of that shift but right now we just have not.

Kathy Johnson: The other one with online, when the community colleges are working together and partnering up with is LinkedIn, which bought Lynda.com. Lynda.com curriculum was being made available to the college students. Do you see that as a disruptor or as an enhancement within the classrooms?

Barbara Hawksley: I see that as an enhancement. I have taught Microsoft Excel on different levels to students and I have incorporated some of those tutorials and videos along with the ones from the Goodwill Community Foundation tutorials; they really help and the students are thrilled about having the tutorials in addition to your own tutorials using Relay.

John Russo: It is interesting to look at it as competition, but I think it will definitely be an enhancer. I use some of those tools that the students did not have access to and now they do. Our role as instructors has changed from the knowledge expert to the facilitator. Anybody can go online and learn things but by facilitating we are bringing those tools together and making them accessible to students.

Kathy Johnson: In the area of demographics. Do you see the high school population coming in or are you seeing more of reentry, existing people who are already working in the industry being the majority of your population? Do you keep track of that influx?

Steven Deeley: Putting together some of these program reviews right now, I noticed the percentage has shifted in some of our areas more towards the traditional college age student; 18-21 making up a higher percentage. Because people are financially conscious now, those who might have gone to 4-year schools out of high schools are now going to 2-year schools. The economy is quite robust, and your older students will go out and work. Historically when we have a recession, we have more people enrolling. Our enrollment is slightly declining.

Barbara Hawksley: In our business program, we see a lot of the students between the ages 30-35. When I hold my office hours on campus, and I have a lot of the online students come in the age varies. I think even with our entrepreneurial program a lot of the people who actually have small businesses come back into our program to learn new skills. We are well rounded in that sense.

Kathy Johnson: Talking about gig economy and the importance of, an individual who is doing their own start up or their small practice, understanding the business side is really important. Do any of the colleges have courses that relate to human resources?

Donald Bowman: We do. We also have 2 human resource certificates, which focus on that skill set.

Barbara Hawksley: Yes, at Golden West College in our management program we have a Human Resource Management certificate of achievement.

John Russo: We have a human resource class; we do not have a certificate right now looking at developing it. When we look at the Circle of Excellence data that Cathleen Greiner had brought up, one of the highest demands was in human resources and the lack of certifications.

Kathy Johnson: A growing trend that comes up for small, midsize businesses and startups, is the outsourcing of their human resource department because they do not want to build a whole department.

Arabian Morgan: At OCC our human resources is taught within the management and leadership classes, and a little in hospitality classes. We do not have a dedicated human resource class, but we definitely cover a lot of the material. At a recent Advisory meeting for our accounting department we were paying special attention to the outsourcing that is going on, even in the accounting area. It is a challenge but there is opportunity if there are some entrepreneurially minded folks who want to pick up on the outsourcing.

Kathy Johnson: With the outsourcing, it could be to a company that is doing the accounting and HR. A lot of temp agencies have in their long term temps, they come in twice a week. We see accounting being outsourced in different ways, they do not need to have people, especially the smaller startup companies.

Arabian Morgan: Unfortunately, higher public accounting firms, their outsourcing goes overseas.

Kathy Johnson: Any advice you can give to the instructors at the high school about preparing their students to come in the community college level. What would you tell these instructors at the high school level or even the career counselors that are here for students who are expressing interest in this field?

Donald Bowman: Having interacted with panel members here on different projects, reach out to your community colleges, if they do not reach out to you and try to develop a relationship because all of us are ready to step into that lower realm to grab the students. To try to get them interested in something that they can move outside of high school and already be prepared; have a focus or exposure on what they want to do.

Barbara Hawksley: I would encourage your students to tour, come to our career days, getting your high school students familiar with our campus. We used to have an articulation agreement with the Accounting 100 in Ocean View High School; we would like to reinstate that and any other type of articulation agreements with your campus or anybody else's campus.

John Russo: Give your students the opportunities and exposure to classes above and beyond what they are taking in high school. Through dual enrollments, I have had students take the business class and say I have decided I do not want to go into business; and I thought that is kind of a win because it is helping them find what they want to do and what they do not want to do. As we think about the entrepreneurial mindset and hopefully our employers will touch on this in our trends panel; the entrepreneurial way of thinking that failure is okay, that creativity, looking at challenges as opportunities and instilling that mindset is really valuable. Understanding that entrepreneurial mindset.

Samreen Manjra: Encourage your students when they are thinking about what college they want to go to, take a deeper look at what they want to do in terms of a career path and actually

spend more time researching. Coming on campus for career events, for understanding what we offer for just the orientation days. Also, going to the Career Center or figuring out what clubs we have on campus so that way they can see the broader experience. Research, so that way they are not switching majors multiple times in community college.

Audience Member: Jason Ross, Assistant Principal from Huntington Beach Adult School in the Union High School District. For the real estate program, you have to be 18 years old to take the test but do students have to be 18 to begin the program?

Arabian Morgan: As long as the high school student qualifies to enter a community college, they can start taking classes, they just need to wait to take the final test.

- My advice for high school students coming in is to talk to a counselor at the community college, make sure they are on the right path to accomplish what they are looking to do. If they want to eventually transfer to a specific 4-year school there may be specific classes they should be taking.
- Even though we still encourage students to come and get a broad experience we just want to help them focus and I would also encourage them to understand that community college is an option for them before entering the 4-year school.
- We get them to a higher level of thinking and way of doing things but it is not just dropping them in the water and say okay now it is time to swim on your own so we want to provide that intermediate gap for them.

Kathy Johnson: We have a presentation by Jacob from the Orange County Center of Excellence. Jacob please share the information you have for this sector.

Jacob Poore, Research Analyst, Orange County Center of Excellence: We did the Sector Analysis Project. Our full name is the Center of Excellence for Labor Market Information.

- We are a technical assistance provider, funded through regional strong workforce program; funds to provide labor market information to Orange County Community Colleges for CTU program planning. Strong workforce planning so that we know what kind of jobs our students can get and what we can do in our programs to help them get into those jobs and earn living wages.
- There are other centers across the state. With Sector Analysis Project, we wanted to start with quantitative labor market information data and see where are the labor supply gaps and where do programs exist to fill those gaps.
- Understand and identify those 2 parts and then we invited faculty and administrators from various Orange County community colleges to come in, take a look at that data so that we can discuss the institutional and regional challenges that each of the colleges face in Orange County.
- What they are doing to close the supply gaps, where their programs exist already and come up with a bit of a regional strategy to closing the supply gaps in business and entrepreneurship and train our students to enter the work force.
- We start with labor market information, the quantitative data to put that in front of all of our faculty and administrators and see what their thoughts are; then we talk about things we might have missed and talked about areas where there are challenging to expanding programs.
- Labor market information refers to demand and supply. Demand is the number of annual job openings and opportunities for our students or anybody out in the work force so that employers can increase productivity.

- Other things that go into occupational data are things like wages and job growth.
- We provide the students and worker training for workers to go out and get jobs. We look at programs offered at the community colleges and how those programs are related to occupations.
- We look at the demand and the supply together to see what the gaps are.
- Looking at it from the community college perspective we wanted to only look at the middle skill jobs, typically requiring more than a high school diploma but less than a Bachelor's degree.
- Looking at this data there are some disclaimers and limitations
- A student can earn more than one award so we might be over counting some of the supply for some of the occupations and then earning that award does not necessarily mean a student is qualified for an occupation and the reverse.
- We want to make sure that we are not only looking at where there is a supply gap but we also want to make sure that our students will be able to go in and earn living wages.
- Orange County is expensive place to live but you are right it is looking at this wage here which is \$17.39 an hour which comes out to about \$36,000 per year and that is to meet basic necessities. But if we can get students into these jobs we can at least say you will be able to support yourself and maybe potentially a family if you are making more than that.
- About 21 different occupations and the take away here is that there are supply gaps in all but one of them. There is a lot of opportunity here for our community colleges to train students to go into these top middle skill jobs that pay living wages. The wages are over the \$17.39 mark and some of them are looking at the entry level wages \$23-25.00 an hour range for some of these and then with more experience students can move into the median wage.
- Once we add up all the demand and supply, there are about 26,000 annual job openings that employers expect to fill in Orange County. We are supplying about 6,600 awards per year in business and entrepreneurship which means we have a gap and this is what Cathleen Greiner mentioned earlier about 19,000 awards to close that gap to meet the demand of Orange County employers
- Employers tend to hire students before they complete their training because they are trying to fill these jobs. Because there is really high demand or maybe that is because some of our programs are just too long and we are giving students the skills that they need but they are not able to get their degree or certificate because they do not want to take the 2 or 3 additional classes.
- Dual enrollment is another great way that we can encourage more students to enroll in business and entrepreneurship programs.
- We talked about entrepreneurship, another way of saying you do not have a good way to measure entrepreneurship skills and if we are supplying enough for that and entrepreneurship could be used across a variety of sectors.
- We did not look at knowledge skills and abilities at all so that is something that we would have to validate with employers to see what they are asking not only maybe from an education standpoint but what they want our students to know in order to succeed in their companies.

Audience Member: Entrepreneurship is a tough one to track because if an individual is doing something on their own, they are an independent contractor, they are working for other people but they are basically an entrepreneur and they are employed; how do you factor that into the statistics and keep track of all those people that are employed but they are not in a company or maybe they are working under their own name?

Jacob Poore: It is not included in this data, we can take a look at the data and see those who are self-employed. There are data sources that provide that and something else to point out is, some people have expressed interest in seeing how many small businesses there are in Orange County as a proxy for that. Other centers across the state have done that before and people have even suggested looking at small business applications. We can look at our data and toggle between each of those occupations and see how many people are employed, how many of those are self-employed versus employed in a traditional employer.

Audience Member: The jobs showed are they for next year or for the next decade? What time frame does that cover?

Jacob Poore: This is for the next 5 years, the 26,000 openings is each year for the next 5 years through 2023, there is a lot more when you add them up.

Audience Member: Is the information you presented for Orange County or LA and Orange County?

Jacob Poore: Just Orange County, we hear that a lot especially from our colleges that are in Orange County, like Fullerton or Cypress. We know our students can come from a variety of areas so this does not include LA or the Inland Empire, there would be a lot more opportunity there too.

Audience Member: I just came from jobs for the future workshop and the state gave us all kinds of things but thinking outside the box with entrepreneurship. We are talking about skill sets, every employer will hire and then train since everything is changing so quickly. Those are some statistics I know will be more difficult to get but something that is true about entrepreneurship programs and I do not know how to bring those statistics in here.

Jacob Poore: This is just the first phase. We wanted to get everyone on track with our data, what we would like to accomplish in phase 2 is validation of the knowledge skills and abilities. We know that community colleges and high schools offer a lot of courses that can teach somebody a skill but does not necessarily train them for an occupation. We know employers want those skills so it is something that we are going to look into doing in the future as well.

Audience Member: Something that perhaps in some regions is more valid than in Orange County, when you are looking at the disparity of trying to bring up the economics of certain backgrounds that are not as high up. Looking at the racial divide, of course it is not something that is built into communities but that is what raises communities.

Jacob Poore: That is why we want to look at the living wage jobs as a starting point and we know that can vary in different parts of Orange County.

Kathy Johnson: Thank you Jacob, we always appreciate you providing us with this information and being a resource for the education community. It is time to close down this session so give a thanks to the colleges for being a part of this information session. We will take a break then then come back for our Industry Trends Panel session.

Business/ Marketing/Accounting Regional Advisory Board

Trends Panel

Friday, November 15, 2019

Cisco Systems 130 Theory, Suite 100, Irvine, CA, 92617

Trends Representatives:

Nicole Cox, Insurance Manager, Ernst and Young

Paul Beakes, Senior Vice President, ERM Insurance Brokers

Jessica Martini, National Accounts Manager, Southwest Airlines

Alvin Fong, Chief Operating Officer, CIE

Patti Larson, CEO and Managing Partner, Sun Up Group

James Haynes, CPA and President, Haynes and Associates

Kathy Johnson, President, Vital Link: During this panel we will be discussing trends in the industry in general. Trends can be from different kind of sources; workforce demand, soft skills, and then we're going to provide you with recommendations and advice that the advisors might have for either you or for your students who would be entering the industry.

Nicole Cox, Insurance Manager, Ernst and Young: We are one of the big four accounting companies; we offer services in audit, tax, and consulting. I've been with the company almost six years and I primarily serve our real estate clients.

Paul Beakes, Senior Vice President, ERM Insurance Brokers: We are here in Santa Ana. ERM is a full-service commercial insurance firm that specializes in addressing workers' compensation, insurance fraud, and cyber fraud. It's a very serious issue in Southern California, it takes a specialized workforce that we train in house.

Jessica Martini, National Accounts Manager, Southwest Airlines: I'm based in Long Beach but I manage a portfolio of accounts that are in San Diego and Las Vegas; I handle the relationship management between Southwest and 50 of our top customers for those areas.

Alvin Fong, Chief Operating Officer, CIE: We focus on launching, accelerating, and ultimately exiting startups. We take an idea and bring it to life. We also worked with fortune 1,000 companies to figure out what that next phase of innovation needs to be for them and we build exclusion and make sure we get customer engagement around those experiences.

Patti Larson, CEO and Managing Partner, Sun Up Group: We are a business strategy, brand positioning and go-to-market company located in Tustin. We're really good at helping companies that have had some success but are looking for that next level and helping reposition their brand as well as helping leaders get out in front of their logo.

James Haynes, CPA and President, Haynes and Associates: We do tax work and consulting, mainly for small businesses. I was a CFO for 10 years for various size companies.

Kathy Johnson: A small business trend, Generation Z will contribute to small business success. 40 percent of Gen Z will be the consumers in 2020. The economy will continue to grow.

- A side job could be a great way to get your feet wet and be an entrepreneur.
- In accounting trends, data analytics used for auditing and reviewing for decision making, outsourcing of accountant duties that allow small businesses to focus on their operations.
- Then marketing trends, personalization helps you generate more audience, create more micro-segments, and then increase use of user generated content. People feel like they're a part of your brand's journey.
- What are the trends that you see in the industry and the direction they are going; that our instructors should know about?

Alvin Fong: I would say disruption is the name of the game these days, nothing is sacred, everything is on the table and there are different ways to do it.

- Even high school students can be entrepreneurs. If you have a webcam, access to the internet and a smart phone you can do a lot of things.
- It could be a great entryway into a new career, there's not a linear path. Growing up we're swayed that there's a linear path, the answer is that it's zig zaggy in life.
- Disruption will come and attack the folks who have gotten comfortable in what they're doing. We see this in companies who have been around, very successful for 30-40 years, these are fortune 1,000 companies, incredibly profitable every year up until the last two years. It is because of companies like Amazon.
- Use Facebook to show ads. It is incredibly cost effective and you can splice it by age demographics and interest. There's just a lot of tools for people to be able to accelerate success. You don't have to be in a big company or have big resources anymore. In fact, the scrappier you are, the higher success you're going to have in this new economy.

Patti Larson: It also applies to the personalization.

- Internet, social media and all of that transparency is key. Think about personalization. You can't hide behind your logo anymore. Because of the ability for anyone to go and find out reviews and to research. People have exposure to all different tools today.
- Studies show that people don't want to see generic ads anymore. Understanding the buying preferences of your consumers is really important and how you bring that into your strategy.
- Data strategy, analytics and those skills are a hot topic for employers.

Kathy Johnson: Jessica, your marketing or your approach in your business is focused on business to business, as opposed to consumers. Share with us the trends when it comes to communicating from one business to another.

Jessica Martini: There are parallels in terms of how we approach our customers. There are a lot of other companies that are coming up even in the airline industry, for example JSX.

- They crowd source private planes and you can fly on a private plane for a price that's comparable to what you would fly on a traditional carrier. So, what we think of as even as a traditional model of an airline is changing.
- Being able to be nimble in your approach to customers.
- There's also a lot more specialization in terms of how we're connecting with our customers when it comes to how we're analyzing their data and how we're marketing to them.

- What was traditionally under the umbrella of a salesperson and my role has now been split up. So there is a dedicated analyst and a dedicated marketing person; everything is customized for every customer.

Kathy Johnson: I personally have experienced cyber security issues in the past. Talk to us about the trends and why the insurance folks are so deeply thinking about this aspect of a companies operations.

Paul Beakes: Quite frankly we are scared to death of what we're seeing. There's no easy answer to addressing how clever these thieves are. They are from outside the United States, outside the jurisdiction of the FBI, they're really clever, they will request ransoms of a million dollars or more payable through bitcoin sent to accounts outside the US and it is totally untraceable.

- The trends I'm seeing in the industry is not good for different reasons. Our industry is aging, we are starving for youth to come into this industry to learn our craft.
- The risk today is greater than ever before especially in California as it pertains to the labor risk, EPLI coverage, employment coverage and liability work. Employers are being sued over absolute nonsense.
- We have been working hard to bring in paid interns. We want to bring in youth and train them our way in the risk management arena that we specialize in.
- Account manager with 5-6 years of experience with a high school education and general computer skillset can be making \$100,000 or more with full benefits.
- I don't know how to talk to the employment community, the schools. I offer \$18 an hour to start with full benefit. We'll get you licensed, and we'll get you professional designations that you can take to any company in the United States with a massive demand for that designation. Not one phone call or email came in.
- How do I communicate to people in colleges? We are starving for folks that want to learn these fraud, and cyber issues that we will train and educate and pay very well for.
- I know the colleges are teaching one aspect of the insurance industry, folks that would work for a carrier. But there's no training for an organization that actually sells their insurance, that's what the independent insurance broker is all about.

Nicole Cox: I think that everything that everyone has shared so far is what I feel.

- Data analytics is a huge buzz word right now especially digital disruption. These are the two biggest trends that we're seeing now.
- In this digital age, many companies have a lot of big data and they have no clue what to do with it. Many companies are now looking to their accountants to help them break down that data is especially as it relates to their financial statements and to determine what it is telling us.
- I see in schools that there are no Excel programs, no data analytics, IT programs or application systems that are being taught to students. College it's the same story.
- My advice to you all as teachers, counselors and professionals who work with students, encourage them to get started now in understanding how to break down big data. A practical application is Excel, so learning how to work with pivot tables.
- Decrypt is huge and if you don't know the data you don't know how to decrypt, you don't know where the decrypting is happening. So, it's really important that students understand how to really break down that data.

Kathy Johnson: What are the trends for CPAs and accounting departments?

James Haynes: One of our governing bodies, AICPA, has promulgated that we watch our data security. We do tax work, business consulting, we have a lot of sensitive data in our systems.

- We are very highly regulated with regard to how our security is managed. I don't use DocuSign. I have a document signing program that is embedded within my tax program that I can use to send my clients their tax returns and documents. They can send documents to me so we can make sure it's secure and safe. That's a huge issue in our business at this point because of identity theft.

Alvin Fong: I think data is absolutely critical, you have to know what's happening and there are many factors that you can now model out a lot of different scenarios.

- To run a business and grow it you have to both understand the data and also know contextually what that means. I think that's difficult for people to understand what is actually happening in the world.
- If you look at your Facebook feed, you have to ask yourself "why I am seeing this?" What am I not seeing and that's the challenge that we give to our teams all the time. What are those underlying trends, what are you seeing that has a data map to that?
- I think the best analogy we use is pilots. They fly by sight and they also fly by instrument. The best one's know how to do both because there are times when you can see things and other times you can't. The data may be telling you something wrong so I think it's merging all those.

Jessica Martini: We have a lot of people that want to come and work for us, but how do you find people who want to come and work for you for more than six months before they get promoted and go somewhere else?

- Something you can impress upon your students is putting in time anywhere is really what's going to help them grow their career. We have a lot of smart, young and educated people who come out of school who know just as much as we do, if not more. But they sit in an interview and say I can't wait for you to promote me or I can't wait to go somewhere else in six months and that's really tough.

Nicole Cox: We are experiencing the exact same thing. We have a lot of talented candidates who want to come in, but they simply don't want to work hard.

- Accounting is an industry that requires a lot of work up front especially in your first few years.
- The problem that we're running into is a lot of our recruiting and hiring department associates have never been CPAs or accountants. They don't truly understand the number of hours and the amount of hard work that goes into this career. I think when they go out to pitch and sell to our students, they're selling this work life flexibility, which is something that is earned after a while.

James Haynes: I agree, I came through public accounting through large firms, I've been in the industry for about 30 years.

- My dad worked for two companies my entire life, one of those he owned. He was a pharmacist and he owned his own pharmacy. He worked for 35 years until he passed away.
- Today that's not the case at all, when I was in the industry, we would change jobs every 5-6 years. It's now happening twice a year, generally speaking.

Patti Larson: In our firm, we've started to focus on strategic discovery when we go through the hiring process, and as educators, I think it would be helpful to work on that with your students.

- What do you want to be aligned with from a company brand? Is this the personal brand that you want to be associated with? Strongly encourage your skills and aptitude tests. What are your preferences? Where do you want to go? Be prepared to pitch the employer on that.

James Haynes: As a reformed consultant from one of those big firms, the key is authenticity and message.

- I am recruiting in engineering, marketing and production of a company and it's the authenticity. You can do a great sales pitch but if you get there and it's not what you saw, not what you read and not what you felt, you have a massive disconnect, there's a disengagement and lack of trust.
- It's building authenticity, clarity and also part of it is marketing and just positioning of here's a great opportunity. For us, what we find with the right type of person is they are motivated and successful in our company and want to build stuff. They want to create a lasting legacy and we give them that opportunity.
- Compensation eventually will be there and maybe early on, but that's not the motivator. The motivator is, can you make a difference. Paul, in your role it is about making a change, helping companies enable success or preventing failure. The answer is you are very entrepreneurial in helping them focus on it.
- It's always being authentic about the fact that we don't know the answer. You have to work to figure it out. Always asking the question, what am I learning, what am I doing, what do I want to achieve?
- As employers, we always focus on how I am engaging my team members so that I understand what their personal and career goals are. And do we have alignment? Sometimes we don't and that's fine, but we're setting up for success either here or somewhere else. That's a big challenge that we've always had.

Kathy Johnson: I want to transition into soft skills. Reliability is important in the recruitment process. I was in a meeting with a large group of industry professionals and they mentioned setting up a time for an interview and the person not showing up. If that becomes a part of their process, they will not be successful in anything; a simple phone call if you want to reschedule.

Audience Member: When you get applications, do you reply to every applicant? I've had students from the past who say they've applied to all these jobs through LinkedIn or Indeed and they're not receiving any responses.

Patti Larson: In a past role, participated in hiring a lot of new positions and we found that the volume of applicants that we received was so tremendous.

- People are applying to a hundred jobs. Their resume is not tailored to what the position entails so when you have 200 people applying for a job that is an entry-level position and over half of them are over qualified or didn't even read the job description, it becomes challenging to respond to them each individually.
- We also found there were so many that were not responding if we did say okay now we are interested. We've even had people who have gotten to the point where they've accepted the position and then when it comes time to start the job they don't show up because they decided they found something else.
- We want to encourage them to apply for jobs but if they're not going to put in the effort on the front end, unfortunately, it doesn't enable us to respond to every single one.

Paul Beakes: I look at resumes and the first thing I look at is writing, grammar and making a simple declarative sentence. Because we write a lot of letters and notes, things that other people need to be able to understand and read. That is a big issue.

Nicole Cox: I am now partially involved in the hiring process. Once recruiting identifies a candidate, they typically will come to the professionals to vet the candidate. Unfortunately, because of the volume of applications that we get it's very hard to respond to everyone.

- Also depends on the position. The more entry level the position, the higher the volume of applications. It is not feasible for companies to respond to every application.
- We've also seen the trend where we have a candidate, we bring them in, they go through the interview process and they don't show up or they're non responsive when we extend the offer. I would definitely encourage your students, staff, to show some type of integrity when it comes to responding.
- I know a lot of people feel like I don't owe anybody anything or any explanation but it's like you're really starting to build your brand so people in the same industry talk.
- You never know when you're going to find yourself needing that company. We call it ghosting. Basically when you've been ignored by someone you've been dating and they stop responding, that is now transcending into the professional space where a lot of candidates are starting to ghost employers. Encourage your students to have the integrity to at least say, "I'm no longer interested" because that is a trend we see.

Kathy Johnson: Is there a fine line between stalking and following up?

Nicole Cox: I personally have never been stalked, I've been asked can you give me your business card? I hand those out right and left and like I said, maybe 5 percent will actually follow up, send a thoughtful email and not just this generic "hey nice to meet you, thank you."

Jessica Martini: If a job listing says please don't contact me via phone only email me; that's where it's crossing a line into stalking. A lot of that is they're probably trying to funnel it through the appropriate channels or maybe they just don't pick up their phone. But I would echo that it's probably less than 5 percent of people that are actually going through the effort of following up because they apply to 100 jobs.

Kathy Johnson: What are the top three soft skills that you would want to see in an employee? These are the non-technical skills.

Paul Beakes: Having good general communication skills, being honest. People can read through dishonesty. Good writing skills and general computer skills.

- I'm a professional insurance sales person. We are a sales organization and when I get a resume from an applicant sending it directly to me personally, I read and respond to them all.
- If I'm going to hire someone that wants to be a professional sales person, then they've got to have the gumption to do 1, 2 or 3 different items. Send me an email, direct the email to me and ask me for my attention. I don't mind professional sales people calling me up and saying I've heard all about your organization can we schedule a moment to talk?
- I'm a guy that learns sales the old fashioned way, I shake hands, I want to engage, I want to communicate. I'm not a techy guy like most on this panel, I'm a communication person. I read the body language of CEO's. I ask questions to understand really truly what the issues are and that's a skill set I'm not seeing coming into my work place. It's something I have to train.

Kathy Johnson: Paul, you said something really profound there, the body language. Because if, the majority of our communication is online, on phone or through email, I'm never going to learn the body language. I don't have that built into my experience base.

Paul Beakes: It takes years of perfection. When you miss out on enough sales you begin to learn what could have gone wrong. You look at did I not ask the right questions, did I not dig in and find out what the problems were? You can't solve a problem unless you truly understand what the buyer is experiencing.

- I interview young folks and I see people on their cell phones in the interview. Be considerate in an interview, focus on the person interviewing you, and listen to the questions. Listening is the most important trait any school could offer. That is a skill set they must know and understand; they can't be coached, they can't learn without being able to listen.

Nicole Cox: We as adults and professionals have an impact on the lives of candidates.

- We hold a responsibility in this digital age. If you have ever ridden a train or a bus, everybody is literally tapping to their phones. Two and three-year olds are having access to a tablet and it's really detrimental to our communication skills. A lot of the staff that I work with when I come up to them and try to have a simple conversation, it's very hard for them to look me in my eyes. It makes it very difficult if I can't even communicate with you even when we work in teams.
- I get very nervous putting certain people in front of my clients because they don't have those simple communication skills and it is a problem that we are seeing with the new class of hires we are bringing in.
- It is just that simple communication, looking you in the eyes is really getting lost. I would encourage all educators and professionals that work with students, incorporate that back into your classrooms. I know some teachers will say this is a no cell phone zone; you need to put your cell phone in a box or away so they can really engage. But I would take it a step further where you're literally forcing students to speak daily to answer questions.

Force them to step up because it only is going to get harder as they get older. I think that's one simple way you can help the students now who are in this huge digital age where everything is on a phone.

Patti Larson: I found this information from the National Association of Colleges and Employers; 82 percent of hiring managers and HR professionals ranked communication skills as number one; problem solving is number two; the ability to work with a team both upward and down is number three; four would be listening skills; and five is the attention to detail.

- You're hearing this kind of being echoed throughout the group. I would just add that as a hiring manager, attention to detail and doing your due diligence prior to the interview is really important to me and puts you up on the top of my list as a candidate.

Audience Member: There is a commercial with the tagline that reads something to the effect of I'd rather have four friends than 400,000 followers. My son is 15, he's a sophomore in high school and we've encouraged him to not get on the computer but to go out with his friends and become social. We want him to delve out those social skills. A lot of the people at school just don't have them and I think that's lending much of what's going on in society.

Jessica Martini: Southwest tends to hire more for culture fit and personality than for skillset. You'll find that a lot of companies are moving in that direction because their feeling is we can teach you the skills but we can't teach you to be a warm friendly person and to have good customer service skills. Those are things that you've either got them or you don't by the time you're ready to enter the job market.

Kathy Johnson: Thank you Jessica that is a great way to end this session. Please give our panel of experts a big thank you for being here and sharing this important information. We are going to end this session now and go into our Pathway Breakout sessions.

Business/ Marketing/ Accounting Regional Advisory Board

Accounting Breakout

Friday, November 15, 2019

Cisco Systems 130 Theory, Suite 100, Irvine, CA, 92617

Industry Representatives in Person:

Arabian Morgan, Founder, Arabian Morgan Enterprises

John Dade, Senior Manager, High Ridge Futures

Alexander William Elliott, Certified Financial & Tax Advisor, A.W. Elliott and Associates

James Haynes, CPA, Haynes and Associates

Industry Representatives Submitted Data in Writing

Nicole Cox, Ernst & Young

Ursula Garrett, Garrett & Associates

Arabian Morgan, Founder, Arabian Morgan Enterprises: Welcome to the Accounting Breakout session. We have a group of employers who will be providing you with information to incorporate into your curriculum. During this session please make sure to get questions you need answered in terms of what it is you're looking to do at your schools and need industry approval. We will have our panel members introduce themselves.

John Dade, Senior Manager, High Ridge Futures: In the financial industry for almost 20 years. My expertise are alternative investments, raising capital for private managers, asset managers in the commodities markets and helping investors get involved with that asset class to help balance their portfolio.

Alexander William Elliott, Certified Financial & Tax Advisor, A.W. Elliott and Associates:

We are a comprehensive financial and tax advisory firm, been in business for 30 years.

- I'm a certified financial and tax advisor, certified tax coach and certified pro-advisor with QuickBooks.
- We work with individuals and businesses; on their book keeping and taxes.
- We do corporate, LLCs, C Corp, S Corps strategy and planning, in addition to doing their corporate returns and we work with the owner on their financial planning; means and investments. Putting more money in the owner's pocket and building his net worth.
- As well as wealth management, financial planning, investment, retirement planning for individuals.

James Haynes, CPA, Haynes and Associates: I came out of college and went into audit, virtually where almost everybody goes. I did not like it but then, I found tax; which created everything for me.

- I went from 10 years in public accounting into private industry, became a controller.
- Worked my way up to CFO. I was a CFO for 10 years and realized I don't like this and I retired.
- Recently I went back to start my own practice. We do taxes and accounting but I also bring my background in running companies. Most CPAs have never run anything other than a CPA firm.

- I've run development companies, contractor companies and more. I teach people how to do cash flow analysis. Things they've never even thought of doing.

Arabian Morgan: James, you listed the following positions that would be recognized as entry level; data entry clerk, accounts payable, accounts receivable clerk. What education or skill sets do you require for these types of positions?

James Haynes: For those types of positions, they do not require a college degree. AP clerks, AR clerks, data entry; need a high school diploma or GED. There's a huge need in many companies for these positions. The amount of data that we deal with is incredible and if you can use a 10 key touch, able to type reasonably well, those positions are all over the place.

Arabian Morgan: Alexander, you listed 2 positions at the entry level, both needing community college degrees. Can you tell us a little about the positions, the job duties and where that new person would start when they come in?

Alexander William Elliott: They could enter the positions with a high school degree, but they have to know computer software, if they've worked with any kind of accounting or tax software.

- A software which shows how to balance your checkbook. Even adults or clients that I have don't know how to balance their checkbook. That would help, working with assets, debits, and credits. Them learning how to do that and using the check book software.

Arabian Morgan: What kind of software are you using on the tax side?

Alexander William Elliott: I use TurboTax and Tax Act.

James Haynes: I use Lacerta and I use a company called Drake.

Alexander William Elliott: Yes, Drake.

Arabian Morgan: John, you listed positions that need a high school diploma. Can you describe the position to us and the types of things they would be doing on the job?

John Dade: Unlike accounting and CPA, which is pretty much relayed; in the financial industry, there are many different moving components.

- We look for people skills and ethics in the industry. You might be dealing with stocks, bonds, commodities, and real estate ETFs.
- You need that flexibility and we will train you in all of that.
- One of the critical skills is the people skills. Nothing personal on the CPA side, but you're more than likely presenting to companies or to clients; but they have a need and they're coming to you.
 - On our side, the investors have needs, but there's so many choices out there, we have to be a little bit more proactive. We have to go out, present ourselves and be sales people as well.
 - We need to have the interactive skills, the eye contact and body language.

- But number 1, along with the COA side, is the ethics. You're dealing with people's money, lifestyles and their futures.
- We don't require a college degree. I didn't have a college degree. Been here about 20 years. We will share with you, teach you and help you learn everything you need to know in the industry, but you need the interpersonal skills to make it work.

James Haynes: Younger accountants coming in see the job as being boring. We're taught, you go into your office or cubicle. You sit at your desk and you just do audit after audit. You do your work papers, make your notes and then go to the next file and you do the exact same thing over and over.

- But as you progress through the ranks of a firm, there's a metamorphosis that happens because at one point, you no longer become a technician and you become a salesman.
- That's a whole different perspective that a lot of accountants, can't make that transition. They don't deal with clients. They don't do tax work. They don't review anything. They're out there trying to get their firm clients and that's their job. It's a disconnect for many people in the industry. It's a hard transition to make from one side to the other.

Audience Member 1: Across the whole panel, I hear a lot about soft personal skills, but what level of math are you requiring? Advanced arithmetic, basic algebra, advanced algebra? To get to come in at entry level position.

James Haynes: There're no algebraic equations. There're formulas, things you have to learn and use, when you do financial analysis. You will deal with formulas and ratios, but from a purely technical side; if you can add, subtract, multiply and divide, that's 70 percent of what we do.

John Dade: I would agree.

- We're licensed by the state and by the feds on the commodity side. We are registered through the National Association and the Commodities Future Trading Commission. We're also registered by the SEC, Securities Exchange Commission and FIMRA.
- Taking the test to become a part of the financial arena, you need the basic math skills. Add, subtract, multiply, divide and you need some spatial skills because in our industry, there are equations and formulas you need to know.
- Once you get through the test and become licensed, the math skills are critical, but again, basic.
- Because the software in our industry has come so far that I can sit down and get the information from a client, all their background and I can put it into a machine, to a computer and it will come out with 2 or 3 different scenarios to meet that client's needs. Then, we fine tune it once we take it back to the client.
- In our industry, college is great, but if you have a high school diploma, you're eager, you want to make a career, and we will give you the skills needed to do that on the numbers side.

Alexander William Elliott: The math skills are good. Be good at catching errors, even with the software.

- I started a new financial planning company, but I have a security license, certified financial planner for about 20 years. You've really got to be good enough to catch errors.

You're going to be doing stuff on your tax software, when you're doing a tax return and you go to the last page, you've got to know looking through there if something's off, or not right. You have to calculate numbers in your head, even though the computer is doing it.

- In what I do, it's more personal. We're doing their bookkeeping, their taxes, their financial planning. You have to be a people person because if they don't like you, they're not going to do business with you.
- Know how to communicate and how to write an email, we were having younger people come in, they don't know how to write an email or communicate.

John Dade: Yes, I agree. I still go to grocery stores and malls and do shopping. I use the basic math skills. Multi-dimensional math skills are important.

James Haynes: To dovetail on that, similarly, I do shopping. I go to a department store and they're having a sale for 25% off and the clerk pulls out a calculator to take 25% of a hundred bucks. They're not getting basic math skills and it's unfortunate.

John Dade: Businesses use that to their advantage; how many times have we received in the mail \$20 off or 25%? Most people think, \$25 off. That works for me. But 20\$ off would be like, \$40. They know that. Their marketing.

Arabian Morgan: John, we have a lot of returning to the workforce people in our Orange Coast College evening program and some of them are not cut out to join any sort of accounting team. I would encourage them to become an insurance salesman. When they would come and work for you, are they going to be an employee or an independent contractor status?

James Haynes: That's all changed.

John Dade: Everybody's been watching the news and what's going on in California with the independent contractor issue.

- Politics aside, I am in the financial industry and chose to be in that financial industry simply because of being an independent contractor.
- One of my priorities was independence. I like to come and go when I want, independent contractor is what they would be in our industry. It's a plus and a minus.
- The big companies like Meryl Lynch or Morgan Stanley, they'll pay you a stipend to come in and you'll be an employee until you're an independent contractor. In our industry, on the commodity side, you're an independent contractor. You come to work, there is zero income, zero stipend. Therefore, we encourage people that may already have some financial wherewithal, they're older people, and they don't need income right this minute to become independent contractors.
- We would love those kinds of people in our industry because they're not living paycheck to paycheck.
- Even though you can ramp up and make very good money in our industry. It's not going to happen overnight. You have to put in the effort.

- Unfortunately, some of the younger folks come in and they want to make a hundred thousand dollars up front in the 1st year. It doesn't mean it can't be done, but you're an independent contractor, which has some great advantages for the CPA side.

James Haynes: Independent contractor in California has all changed. AB5, Assembly Bill 5, has changed everything.

- I have several clients who are Lyft and Uber drivers and some of them, run multiple cars and they have people working with them. They're also independent contractors, and they would take a cut in pay if they became an employee.

Alexander William Elliott: Being an independent contractor, I worked for a lot of sole proprietors, freelancers, people that run a 1-person business or maybe 2-person business. They don't have time to do the bookkeeping, we handle that. One of the good things, with the Trump's new tax law, you can write off just about everything.

- There's a lot of advantages to being an independent contractor or you get your tax return done and you're a sole proprietor. Then, you can write off your gas and utilities of your home office.

James Haynes: If you run a business, you've got a cornucopia to deduct that you can't take if you don't have that business.

Arabian Morgan: When you're hiring or going through an interview process, do you have the applicant demonstrate any sort of skill sets at that time?

Alexander William Elliott: Just how they present themselves when they come in, how they're dressed, how they communicate, body language. Obviously, you look at their resume and try to see if it's somebody that will fit into what it is you're trying to do.

Arabian Morgan: Are there accounting competencies you're looking for in the interview?

James Haynes: There are some companies that have you do a bookkeeper type exam.

Alexander William Elliott: Yes.

James Haynes: Do you know what debits and credits are? Can you balance a checkbook? These kinds of things.

- How they are dressed. How they communicate with a client or with me; can they get their point across. Those types of things are extremely important.
- Technical skills are important, but if their resume shows that they've at least got that, that's half the battle.

Audience Member: I'm Deanna Martin. I teach at Santiago Canyon College. There is a trend going across the nation teaching without debits and credits. What is your opinion?

James Haynes: That is what QuickBooks does and that is, in my view, awful.

Alexander William Elliott: I don't know if I'd do that.

James Haynes: Yes.

Alexander William Elliott: You can't balance without debits and credits.

Audience Member: In context, it increases and decreases. They've removed the vocabulary debits and credits. When you appreciate your asset, you increase your expenses.

James Haynes: But a debit doesn't always decrease. It depends on the account.

Audience Member: Exactly.

James Haynes: You can't do it that way. At University of Redlands, I teach graduate level accounting and finance and undergrad accounting and finance. I spend most of the time in the beginning class on debits and credits because you need to have that. To do anything, you have to understand that.

- If you can get that, then you've got proclivity to be in the accounting industry. If you can't get that, then you're here because you have to be, because you need the degree.
- QuickBooks does that and honestly, I don't mind QuickBooks. It's everywhere. I don't like it because I do things on journal entries. That's how I see life and they don't use it.

Alexander William Elliott: QuickBooks makes it quicker, because you can transfer bank accounts, your statements and all, but you've still got to go through and balance everything with the debits and your credits.

James Haynes: The last few months, I've got a lot of clients who have received notices from IRS on the 2017 tax returns. There were mistakes on them. The wife or the husband prepared the return on TurboTax and did it incorrectly. They come in and I tell them what they did wrong. You miss a lot of deductions by using those.

Alexander William Elliott: Yes, all of the online software where you do it yourself for free. Then they come to us because we know what the deductions are; they don't know. I've had clients that I picked up because of TurboTax or another software; they end up getting 2, 3 or \$4,000 more back. One person had income property and didn't depreciate the property; that's your biggest deduction on an income property. So, it's a combination.

James Haynes: I have a client, I amended a tax return and he got \$180,000 back that he overpaid. Another client whose previous accountant didn't know anything about certain code section and we got \$15,000 back.

Q: Arabian Morgan: Some schools are at a turning point right now in terms of teaching QuickBooks. Desktop or the online version?

James Haynes: Online. Go to online direct all across the panel. It has to be.

Alexander William Elliott: Yes.

James Haynes: They're different, don't convert desktop to online. It's worse than starting over.

Q: Arabian Morgan: Aside from QuickBooks, what other practical software skills do you want a new hire to have walking in the door?

Alexander William Elliott: Knowing how to balance a checkbook with a software program, which helps because it's kind of the same thing, except a little more complex.

- Also, because if things don't come out right, it's about going back and correcting them and knowing how to do that. Not being intimidated by the numbers. You've got to go back through and find out where that's coming from. They've got to know software.
- Have some software experience. Doesn't have to be QuickBooks or TurboTax. I mainly use Tax Act. But some kind of software skills.

John Dade: Yes. Same in our industry is basic software skills, basic computer skills because each company or entity in our industry unfortunately has their own software program.

- If you're dealing with Schwab, Fidelity, Kaufman or what have you, they have their own portal, their own software program. But you have to understand the input methodology, whether the numbers actually make sense. You have to have that depth of 3 dimensional workings of math to understand. Whether or not it's being input correctly.
- We educate them on the different portals they need to enter the information.
- We also have one thing that the CPA industry doesn't have. Because of the regulations that we're under, our compliance departments are a necessity. I can't hand you a piece of paper, unless the regulatory piece has signed off on it.
- There is a backup, so if you do mess up something on the program, it will be caught by 2 sets of eyes that go through it before it goes to a client.

James Haynes: One would be attention to detail. Being able to focus on what you're doing and pick things up that don't jump out at you. Seeing the relationships here. The ability to think, pay attention to detail and being able to focus is a big thing is important for me.

Alexander William Elliott: I concur.

Audience Member: On your comment about basic computer skills, I think that can be defined differently by different people. Would you give your definition of basic computer skills?

James Haynes: Turn it on.

Audience Member: Typing speed? For example, I have students coming back to work after being out of the workforce for 20, 30 years and I do everything on the computer. When I was explaining to someone in my accounting class, she needs to highlight this, her question was, what does highlight mean? That's clearly going to be below what you're going to require. So, being able to turn it on, she can do, but that's not enough.

Alexander William Elliott: Right.

Arabian Morgan: Right.

John Dade: Most people coming out of high school or college, the younger generation, under 30; have the basic computer skills beyond what mine are. But they need to know the basics. How to turn it on. How to put your password in. How to highlight. How to cut and paste. How to move your cursor to the next box so you can enter that information. Maybe a little above basic training. In our industry, not much more. We can teach them how to use those skills.

Alexander William Elliott: As long as they have the basic. We've got to teach them the software. It's the software they're going to spend most of their time on.

- If they've done things other than on social media, except for LinkedIn or Facebook, that's okay. But if they've done some other things, worked on some other software programs.
- How to cut and paste, write and use Adobe; I use it a lot. We'll probably teach them Adobe and those types of software. Knowing how to write a letter; that would help.

James Haynes: They have to know Excel, everybody uses it and it's ubiquitous. You have to know Excel. I came, when I started out, Excel didn't even exist. It was Lotus.

Alexander William Elliott: I remember Lotus.

James Haynes: I came out of college and we were still preparing returns on the forms. I learned taxes on the forms. The forms have all changed, but the basic concepts are still the same. And if you could do it by form, you can do it in a computer because you can find stuff. It's harder on a computer because you're inputting it and you have to figure out, well this doesn't go here.

Alexander William Elliott: You had to sit there and type. You'd write it out and then, you'd check your numbers 5 times and you'd sit and type because you wanted it to look professional.

Audience Member 2: I have a follow up question. I didn't hear Excel until the very end.

Alexander William Elliott: Yes.

Audience Member 2: That's interesting. I didn't hear anybody say Microsoft Word.

Alexander William Elliott: Yes, Microsoft Word.

Audience Member 2: Be able to type a letter.

John Dade: I guess it's basic.

Audience Member 2: Some have grown up with Google Docs and Google Sheets.

Alexander William Elliott: Google Docs and Sheets are good. That'll work.

James Haynes: Yes, Google Docs, Google Sheets. Same thing as Excel and Word.

Alexander William Elliott: Right.

Audience Member: Tracey Furman, from Huntington Beach Adult School. We have an accounting program; our students are 18 and over, most are in their 30s-50s. In our program, we do require a minimum typing speed of 40 words per minute. We require our students to know how to write a document. So, we make them take a Word beginning class. We make them do. Beginning and intermediate levels of Excel. File management, I haven't heard that yet, but being able to create a folder for your clients and put all of their stuff into one type of a folder. Is that something that would be needed?

Alexander William Elliott: Yes. Absolutely.

James Haynes: Especially the thought process behind setting up the files. It needs to make sense. Could somebody else come in and see what you're doing, what your logic is, rather than having to redo the whole thing.

Arabian Morgan: When it comes time that you see a need to hire, what platforms or agencies do you use to gather applicants in the door?

John Dade: Again, I'm a people person. Body language, skill sets to be able to communicate. I like career fairs, job fairs. I'll even go to small business expos, industry expos, and financial industry expos and recruit.

John Dade: Yes. In today's world, especially in our industry, I find that's a better format than maybe social media or print ads.

Alexander William Elliott: Yeah. I'd probably go with LinkedIn. I'm real active on LinkedIn. I have about 3-4,000 followers. There's also Career Builders and a few other ones that I may use.

Audience Member: Looking to see where we can push our students.

Alexander William Elliott: Even on LinkedIn, they have where we can mentor young people who are going to college; they're generally on LinkedIn anyway. You know this person is going into finance. Can you mentor them? They have those kinds of programs on LinkedIn.

James Haynes: 1st of all, don't use a recruiter. It's expensive. Unless you have a large company. But just for the average, like my clients, use Indeed. I'm not on LinkedIn, but you can use it. Any of those will work great. Craigslist even works, but just be careful.


Audience Member: I'm Borolo, I teach accounting at Santa Anna College and I teach it at Garden Grove. I teach business classes at Garden Grove High School and QuickBooks and accounting at the Garden Grove Adult School. I also do insurance and have a small accounting business. My question is, do you recommend high school students to get a LinkedIn profile?

Alexander William Elliott: Yes, if you're going to college or trade school. They have this program, I've been kind of impressed with some of the young adults that get on there. There hasn't been that many, but they do have it, where you can mentor them. LinkedIn helps.

Audience Member: Would you be willing to take extern students after they complete a program and come practice so they can get some on the job training?

Alexander William Elliott: Sure, yes.

Arabian Morgan: We will wrap this up now and thank our advisors for this great session.

 ENTRY LEVEL JOBS - ACCOUNTING					
INSTRUCTION/SKILL AREAS	Bookkeeper JOB TITLE:	Tax Preparer JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
	IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED				
Professionalism/Ethics: Industry standards and regulations, ethical responsibilities of Accountants, financial reporting, fraudulent statements, organizational functions, internal controls.	A	A			
Accounting Principles and Theory: Terminology, accounting principles/systems/activities, bookkeeping, cash/accrual, financial reports, business structures/ownership, accounting cycle.	B	A			
Transactions - Debits & Credits: Business transactions & accounts, chart of accounts, setup journals, process transactions, P&L statements, balance sheets.	B	A			
Financial Statements and Reports: Schedule of accounts, receivable/payable, financial statements, inventory systems ID, adjusted/closing entries, trial balance, review	A	A			
Accounting Software: Understand industry software, perform all accounting and banking functions, company set up, prepare reports, summaries and graphs, export data.	A	A			
Payroll /Taxes: Set up payroll, computer, process and print payroll checks, federal and state quarterly returns, auto deposit, annual statements.	A	A			
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
Quickbooks, Turbo Tax, Tax Act					
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					
Tax Preparer TAX PREPARER					



Industry Advisor Name: Alexander Elliott, AW Elliott & Associates

**Business/Marketing/Accounting
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company? **Bookkeeper, Tax Preparation**

2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing? **Unpaid- Book Keeper and Tax Preparation. Train them to get certified as a tax preparer.**

3. What **technical/non-technical** skills are you looking for in the ideal intern?
Basic Computer Skills, Math Background, Communication Skills

4. What technology changes or updates should we incorporate into our courses?
Cloud Based Programs

5. Which industry certifications do you value in current and prospective employees?
Certified Book Keeper, Accounting, Quickbooks, Math Background

6. Would you, or your company, be open to supporting any of the following experiences?
(Check)
 Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring

7. Do you have something important to share, or any recommendations, that we haven't already addressed?
No.

ADVISOR NAME: JAMES HAYNES HAYNES & ASSOCIATES, CPA

CTE ₂ ENTRY LEVEL JOBS - ACCOUNTING					
INSTRUCTION/SKILL AREAS	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
	STAFF	ACCOUNTANT			
IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED					
Professionalism/Ethics: Industry standards and regulations, ethical responsibilities of Accountants, financial reporting, fraudulent statements, organizational functions, internal controls.	A				
Accounting Principles and Theory: Terminology, accounting principles/systems/activities, bookkeeping, cash/accrual, financial reports, business structures/ownership, accounting cycle.	A				
Transactions - Debits & Credits: Business transactions & accounts, chart of accounts, setup journals, process transactions, P&L statements, balance sheets.	A				
Financial Statements and Reports: Schedule of accounts, receivable/payable, financial statements, inventory systems (D, adjusted/closing entries, trial balance, review	A				
Accounting Software: Understand industry software, perform all accounting and banking functions, company set up, prepare reports, summaries and graphs, export data.	A				
Payroll /Taxes: Set up payroll, computer, process and print payroll checks, federal and state quarterly returns, auto deposit, annual statements.	B				
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; BA=BA/BS Degree; BFA=BA/BS Degree	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
QuickBooks Both Basic to P & ONLINE					
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK ANY ADDITIONAL REQUIREMENTS					



Industry Advisor Name: JAMES HAYNES
HAYNES & ASSOCIATES, CPA

Business/Marketing/Accounting
Labor Market Survey 2019-20

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company?

DATA ENTRY CLERK OR
A/P, A/R CLERK

2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?

N/A

3. What technical/non-technical skills are you looking for in the ideal intern?

ACCOUNTING BACKGROUND EITHER
VIA SCHOOL OR OTHER

4. What technology changes or updates should we incorporate into our courses?

N/A

5. Which industry certifications do you value in current and prospective employees?

NONE

6. Would you, or your company, be open to supporting any of the following experiences?
(Check)

Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring

7. Do you have something important to share, or any recommendations, that we haven't already addressed?

Not at this time

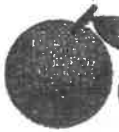
ADVISOR NAME:

John Dade High Ridge Ft. Verde.



ENTRY LEVEL JOBS - ACCOUNTING

INSTRUCTION/SKILL AREAS	Financial	Professional	Advanced			
	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED						
Professionalism/Ethics: Industry standards and regulations, ethical responsibilities of Accountants, financial reporting, fraudulent statements, organizational functions, internal controls.	A					
Accounting Principles and Theory: Terminology, accounting principles/systems/activities, bookkeeping, cash/accrual, financial reports, business structures/ownership, accounting cycle.	B					
Transactions - Debits & Credits: Business transactions & accounts, chart of accounts, setup journals, process transactions, P&L statements, balance sheets.	B					
Financial Statements and Reports: Schedule of accounts, receivable/payable, financial statements, inventory systems ID, adjusted/closing entries, trial balance, review	B					
Accounting Software: Understand industry software, perform all accounting and banking functions, company set up, prepare reports, summaries and graphs, export data.	B					
Payroll /Taxes: Set up payroll, computer, process and print payroll checks, federal and state quarterly returns, auto deposit, annual statements.	C					
EDUCATION REQUIREMENTS (circle): HS=High School Graduation CC=Community College Certificate 2yr=AA/AS Degree 4yr=BA/BS Degree						
	HS CC	HS CC	HS CC	HS CC	HS CC	HS CC
	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS						
BASIC SKILLS NEEDED ADVANCED IS A PLUS						
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS						
Series 3, 6, 7, or 7 Securities License needed						



**Business/Marketing/Accounting
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company?

Phone Skills / Building Relationships & People Skills Development /
Presentation / Speaking Skills.

- a) If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?

Phone Calls / Appointment Setting / Lead – Prospect Management

- b) What technical/non-technical skills are you looking for in the ideal intern?

Phone Skills / Good with Numbers and Math / People Skills / Goal Oriented /
Self-Motivated.

- c) What technology changes or updates should we incorporate into our courses?

Not sure on this topic

- d) Which industry certifications do you value in current and prospective employees?

We would look for minimum High School diploma. Our industry requires a
Series 3, 65, or 7 License depending on area of expertise chosen.

- e) Would you, or your company, be open to supporting any of the following experiences? (Check)

Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring

- f) Do you have something important to share, or any recommendations, that we haven't already addressed?

N/A

ADVISOR NAME: NICOLE COX

CTE _{oc} ENTRY LEVEL JOBS - ACCOUNTING					
INSTRUCTION/SKILL AREAS	JOB TITLE: <i>Audit Associate</i>	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
	IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED				
Professionalism/Ethics: Industry standards and regulations, ethical responsibilities of Accountants, financial reporting, fraudulent statements, organizational functions, internal controls.	A				
Accounting Principles and Theory: Terminology, accounting principles/systems/activities, bookkeeping, cash/accrual, financial reports, business structures/ownership, accounting cycle.	A				
Transactions - Debits & Credits: Business transactions & accounts, chart of accounts, setup journals, process transactions, P&L statements, balance sheets.	A				
Financial Statements and Reports: Schedule of accounts, receivable/payable, financial statements, inventory systems ID, adjusted/closing entries, trial balance, review	A				
Accounting Software: Understand industry software, perform all accounting and banking functions, company set up, prepare reports, summaries and graphs, export data.	B				
Payroll /Taxes: Set up payroll, computer, process and print payroll checks, federal and state quarterly returns, auto deposit, annual statements.	C				
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS CC 2yr <u>4yr</u>	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
<i>Proficiency in Excel is highly desired but not required. All software requirements are firm specific and training will be provided for specific systems upon hire</i>					
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					
<i>Candidates must be eligible to sit for the CPA exam upon hiring</i>					



Industry Advisor Name: Nicole Cox – Ernst & Young

Accounting Labor Market Survey 2019-20

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company?
 - a. EY offers internships to students in community college. Our firm typically does not hire students out of high school, with the exception of administrative roles (i.e. mail room clerk, security coordination, etc.)
2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?
 - a. Our interns must be enrolled in community college (for select internship designed for underrepresented minorities) or a four-year university in order to qualify for a paid internship. We do not offer any unpaid internships. The roles and responsibilities of interns vary depending on service line (tax, advisory or assurance)
3. What technical/non-technical skills are you looking for in the ideal intern?
 - a. Technical: Proficient at Excel (understand v-look ups, pivot tables, shortcuts, finance functions within Excel), good knowledge of basic accounting principles
 - b. Non-technical: great attitude, eager to learn, takes initiative, detail-oriented, innovative
4. What technology changes or updates should we incorporate into our courses?
 - a. Data analysis, forms of digital disruption (i.e. robotics, AI, etc.)
5. Which industry certifications do you value in current and prospective employees?
 - a. CPA, CISA
6. Would you, or your company, be open to supporting any of the following experiences?
(Check)
 Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring
7. Do you have something important to share, or any recommendations, that we haven't already addressed?
 - a. There is a significant decline in African Americans represented in the accounting industry. Firms are interested in learning more about how to hire and retain candidates of color.

Business/Marketing/Accounting Regional Advisory Board

Business Management and Entrepreneurship Breakout

Friday, November 15, 2019

Cisco Systems 130 Theory, Suite 100, Irvine, CA, 92617

Accounting Representatives in Person:

Richard Carroll, Regional Sales Manager, Co Advantage

Rand Brenner, CEO, Licensing and Consulting Group

Jessica Martini, National Accounts Manager, Southwest Airlines

Paul Beakes, Senior Vice President, ERM Insurance Brokers

Accounting Representatives Submitted Data in Writing:

Joshua Rosenthal, Insperty

Barbara Hawksley, Professor, Golden West College: I'd like to welcome you. I'm going to go ahead and have the advisors introduce themselves.

Richard Carroll, Regional Sales Manager, Co Advantage: I am Richard Carroll and Co Advantage essentially puts Fortune 500 caliber HR departments into small business; giving the business owner the ability to attract, grow and retain quality employees, so they can focus on running their businesses. We typically work with companies that are in the 10 to 200 employees range.

Rand Brenner, CEO, Licensing and Consulting Group: I work with businesses of all sizes and help them use their intellectual property as a go to market strategy. That's the licensing process as part of commercializing the company's technology.

Jessica Martini, National Accounts Manager, Southwest Airlines: I am in the business unit that handles B2B sales, but we are known primary for our B2C sales to customers who are traveling for leisure on Southwest Airlines.

Paul Beakes, Senior Vice President, ERM Insurance Brokers: We are a full-service commercial insurance firm that specializes in addressing worker's compensation and cyber insurance fraud.

Barbara Hawksley: We are going to take a closer look at the technical skills necessary for entry-level employment in the business management and the entrepreneurship pathways. We are going to dig deeper in the documents about Labor Market Survey, as well as the Entry Level Job Skills Form. We want to discuss the entry-level positions in your company that might be available for high school or community college students.

Paul Beakes: We mainly have administrative positions for entry-level high school and college students.

- General computer skills are necessary. We are in a specialized niche in commercial insurance. Therefore, we want to take an individual and train them our way to address the special technical risk areas that we specialize in.

- We could take an individual from high school. They may float around the office learning about different positions. They're paid positions and we treat them as though they are a regular employee. Should they perform the way we think they should, the day they graduate from high school, they have a full-time position with full benefits and making a great income.
- We will send the students to get educated so they can earn various professional designations that they can take anywhere in the country and utilize that skill set which is in massive demand right now.
- An individual that graduates from high school could be making \$100,000+ just on the administrative side of the business within 6 to 10 years.
- There is also the sales side. I make sure that the entire corporation is working in harmony and I need folks to be able to communicate with one another professionally, as well as communicating to our clients.
- They must be coachable and they must learn.

Barbara Hawksley: At Southwest Airlines, which entry-level positions are good for a person who wants to move up the career ladder in operations or management side of the business?

Jessica Martini: Southwest is big on hiring based on the personality and culture fit. During the application process, they require all candidates to take a personality assessment. This helps them pair up someone with an appropriate leader and an appropriate job based on what they're demonstrating in the assessment.

- If someone wanted to work at headquarters, the entry-level positions would be mostly related to customer service, on the phone or via email. A really important soft skill is the ability to speak on the phone.
- Self-awareness is important. Have your students' take a Myers Briggs test so they know what their strengths are and areas where they can work on.
- Employees need to have the ability to shake a hand.

Barbara Hawksley: And communication skills. What does an internship look like for someone working at your company? Is this a paid or an unpaid position?

Rand Brenner: What my company does is a very unique niche, it's inside one of the biggest businesses elements in the world and that's intellectual property. I'm talking about beyond getting a patent, trademark, and copyright. The other side of the business is the one on how you manage these and how you make money with it.

- It's one of the biggest issues that's occurring in a political standpoint in what's going on with China. A lot of the issues that are associated with it are because there is a complete lack of understanding and no education about it.
- I offer an opportunity for students who want to learn about an asset that's extremely important, intellectual property, licensing, how you manage and work with it. I don't have any defined program. It's hands on; come in, work with me and learn.
- I can offer an intern the opportunity to work with me side by side and learn something that's a skill set that once they get it, they can travel anywhere in the world with it.

Barbara Hawksley: Is there a good pathway into your company for anybody who might be interested in the management side of operations?

Richard Carroll: The patience and the expectations of not walking in day one and expecting to be a manager. They've got to learn some things and groom themselves.

- Corporations need to clearly define paths and know what these kids are looking for today. They need to be flexible in terms of designing a career path for these new employees.
- It works both ways; kids need to be aware, but I think companies also need to be more aware. Be purposeful in what they want to do and in providing opportunities.
- In our organization, we are going through a succession planning right now, we're looking at all of our employees and what they want to do and where they want to go. We sit down with them and our goal is to make sure that every one of them understands their career path.
- Some may not understand. Some of them are going to be comfortable doing what they're doing for a long time. But we still want to be able to help them grow. There are some people who want to move up or they want to do something different. We're trying to make sure that we understand what those needs and wants are and to help them.
- Locally we don't have a lot of internships, there's more in our corporate office in Florida.
- If some of you wanted to get into HR, be willing to take that entry-level position and learn.
- When they jump into an entry-level position, they're going to see and experience a lot, which is going to help them develop the paths that they want to follow. I would just tell them to talk to people and find the companies within the industry if they've got a specific industry in mind. Sometimes payroll is a good way to get in and also for students coming out of college. Payroll companies also look for people from a sales perspective. There are many ways to get the entry-level HR.

Barbara Hawksley: Is your clerical internship paid or an unpaid? Is there a formal process for applying for that? How long is an internship program?

Richard Carroll: Until they graduate from high school. We want to groom them for a lifelong profession that they can utilize anywhere in the United States. We bring them on with the intent that this is a long-term relationship. It is a paid position and we put a lot into their development so that should they move on to another profession, we know for certain they walked away with a great skill set from us.

Barbara Hawksley: What are some of the different types of intellectual property and management IP? Are there any other areas that would be helpful if they had an understanding?

Rand Brenner: A lot of the education that you're teaching students are the skills that they need to create intellectual property. Educational systems are intellectual property factories.

- Nobody thinks about intellectual property, they think about tangible things like a product, a service, a software. But the reality is, everything around you starts with intellectual property and it starts with students who get the skills to be able to create things.
- The types of intellectual property that are created are known as patents, trademarks, copyrights and now, there's trade secrets. Inside all of those are many facets of

intellectual property. Most of them are not understood and they are mismanaged by businesses.

- The skills that help any student interested in this would be coming from a science, engineering or technology background. Most important, they would be open minded and entrepreneurial.
- One of the most challenging things is to be able to understand intellectual property enough to know what you should do with it and how it can be applied. That's one of the reasons clients come to me. Many times, they're surprised that I evaluate their intellectual property and ask them questions about the different applications and markets that it can go to.

Barbara Hawksley: Can you tell us more about the values that your company has set for your employees, both internally and externally with your customers?

Jessica Martini: Southwest is big on hiring for culture fit, you'll find that on the website, when it lists out the mission and the values of the company, those are things specifically that we're looking for during the hiring process.

- We want someone who has a fun, loving attitude, has a warrior spirit, is going to lead the Southwest way and embody what it means to be a Southwest employee.
- We can teach you the skills but that's why there is a personality assessment on the front end because we want to find someone who's a good culture fit; and we want them to be paired up with the right teammates that complement their skill set. Their leader should understand what those strengths are and the areas where they need to improve.
- That's an ongoing process. It happens when you're hired, but also every year, you have to retake that assessment because as your life changes, so do some of your strengths.

Barbara Hawksley: Is the Myers Brigg, the screening that you have prior to interview process?

Jessica Martini: Southwest uses the Gallop's Strengths Finder, similar to a Myers Briggs and afterwards it will tell you what your top strengths are. It's something that is part of our vocabulary within the office environment on a regular basis. People know what their top 5 strengths are and they can speak to them proudly because they know that those are the things that are setting them apart from other candidates and from other people on their team. It's become a part of the everyday work life, having that self-awareness and then also working on the things you know need improvement.

Barbara Hawksley: I noticed that you had mentioned professional appearance, demeanor, as well as proactive networking skills. Can you expand a little bit more on these values?

Jessica Martini: I speak to a lot of undergraduate and graduate classes and I'm always encouraging them to go to networking events for industry associations. There is so much value in going to an event where you can meet other people who are interested in the same thing, whether it's insurance, aviation, or whatever it might be.

- Practicing small talk, shaking hands and engaging with people at a very basic level because these are the soft skills that we're missing with a lot of candidates coming into the workplace.

- You can have it done in your classrooms where they go and network with each other and talk about the weather. Learn how to communicate, look someone in the eye and shake hands.

Barbara Hawksley: I teach a business communication class and I think diversity, working globally, just working internally too, some of those small gestures are very important.

Jessica Martini: We have a lot of candidates that look great on paper but when they come in, for an interview, they are very underwhelming. Because they can demonstrate with words how wonderful they are and they are a piece of cardboard in person. That is not what we're looking for.

Barbara Hawksley: In your area of management in human resources or sales department can you give us an overview of the non-technical skills that are most important for your team members?

Richard Carroll: Most of my team members tend to be salespeople, it's pretty fundamental. When I interview, I look for attention to detail.

- First, I look for errors. I'm looking for a comprehensive resume. It's the quality of the document that we're looking at. Then the soft skills, being able to give a proper handshake and greeting.
- Also, follow up. It's fundamental blocking and tackling in my mind, but if they don't have the follow up skills, it's not anything that we want. I interviewed a young lady and at the end of the interview, she looked at me in the eye and she said, "I want to leave you with three things. I want to work for you. I want to start soon and I promise you that I will outperform everybody on your team."

Barbara Hawksley: She nailed the interview.

Richard Carroll: She really did.

Barbara Hawksley: In my business communication class, they learn how to write various messages, in addition to oral speaking skills.

- One of the things I impress upon the students is presentation of their documents. Not only the written skills but also proofreading. I teach them how to create a memorandum, and how to create an MLA style format with the cover page, the table of contents and just a basic letter.
- I think they are missing this with all the social media. I don't believe the students understand the importance of presentation of business documents.

Barbara Hawksley: What technology changes or updates should we incorporate into our courses? Rand, you describe intellectual property as an indispensable skill set for the 21st century. Can you give us more information about why you are saying that? Share with us, from the perspective of business management and entrepreneurship.

Rand Brenner: The reason I'm saying that is because when I work with clients they grossly mismanage intellectual property on a continuous basis. There are hundreds of millions of dollars invested in it, but companies don't know how to use it; and the reason is because nobody was ever trained. They go to business school and learn marketing, finance, accounting, how to sell and distribute which are tangible skills.

- But when an intellectual property asset is put in front of them, they don't know what it is. It's just not known. In fact, I wrote a book (*Hidden Wealth*) because people kept asking me questions on how to do it.
- It is a very important skill, every business that's founded today, everybody that comes out and wants to be an entrepreneur, it's all intellectual property.
- Many corporations today are moving out of making anything because they've figured out that they can let others make it using intellectual property.

Barbara Hawksley: There are often certifications or specific software applications that are important in your area of the industry. Paul, what type of certification does someone need to work in your sector and is this something that a company like yours would support an employee to achieve?

Paul Beakes: We ensure that all employees are licensed by the state of California. They have a property and casualty insurance license. Beyond that, there are different types of professional designations, depending on what areas they want to specialize in.

- When an intern works for us, we ensure they bounce around the office, assist in multiple different areas because they don't know exactly what interests them. Once they decide, we send them to school to learn about, to obtain a designation in their desired field.
- We like to bring people in, train them our way and move them up the ladder. Eventually, they'll work their way into management positions.

Barbara Hawksley: There's a proprietary, specific type of software applications that your employees need to know. How is Microsoft Excel important your organizations?

Jessica Martini: The entire Microsoft suite of software is important. Excel, PowerPoint, Word.

- Experience with a sales related CRM, like Salesforce, is great; but those are teachable.
- Technology is more accessible for people coming out of school now. Some may already have experience with Slack or Dropbox.
- At the entry level there is not a focus on certifications or anything we're looking for specifically.

Barbara Hawksley: Rand, you listed CRM, is there one or any specific type that you are looking for?

Rand Brenner: CRM is important. There are big software companies that are moving into the intellectual property field with computer programs on a foundation of CRM. But these are built and meant to handle specifics for intellectual property licensing, the contract aspect, and the negotiation aspect. Even the presentations and the deal memos. Everything we talked about here from communication skills, Excel, PowerPoint; these are skills that are needed by people who are going to work in intellectual property.

- I speak with researchers, scientists, physicians and I ask them, “What’s your intellectual property?” They don’t have it organized. They don’t know how to communicate it properly.
- If you do not have the skill set and cannot follow the process properly using tools such as CRM, document management, contract management, you end up stalling.
- No specific CRM system that I say you would need to get skilled on. CRM is contact relationship management.

Barbara Hawksley: Richard, are there any other applications that possibly haven’t been mentioned that might be important or needed in any type of entry-level position in your organization?

Richard Carroll: Excel is big for us, we use Salesforce for CRM, and we have a host of proprietary software.

- I think just having some basic overall skills and understanding of working with software, having the ability to learn and be flexible. There are going to be proprietary programs that they’re going to need, and they have to be willing to learn and jump into something new.
- The Payroll system we have for our organization is proprietary, along with other management systems that we use. It’s up to us to make sure that we train the people that come in.

Barbara Hawksley: Can I ask any of you to share your takeaways from our advisors?

Audience Member: Everyone mentioned Excel and the Microsoft products. Many schools have moved to Google Docs and they’re not using Microsoft Office. What are your thoughts on that?

Jessica Martini: We exclusively use Microsoft Office products. In fact, we have all of the cloud-based systems, like Google Docs, are actually blocked on our server.

Rand Brenner: Google Docs is something I use frequently with my clients. Intellectual property runs around the world, 99 percent of the time, I never meet a client face to face. It’s a transfer of information. Anything that requires information sharing, such as a Google Docs system is just fine.

Paul Beakes: Our organization strictly uses the Microsoft Office suite.

Audience Member: Jessica, do you use the Microsoft cloud-based sharing?

Jessica Martini: Very infrequently, because of the volume of documents that we’re using and the size that we need to use. We have Dropbox accounts that we use, but they’re specific to each department. The Excel version on Google Docs is not as robust as regular Excel. If they’re only learning in that, they’re not going to know all the things they need to know for things like pivot tables.

Audience Member 1: Do you prefer Microsoft or Google?

Richard Carroll: Microsoft.

Barbara Hawksley: Many schools spend a lot of money on equipment, while forgetting that it needs speakers, cameras, or they're locked out due to security systems so they can't video conference. Do you video conference and if so, how often?

Paul Beakes: We do not video conference.

Jessica Martini: We use Webex but we just use the dial-in feature because we work from home.

Richard Carroll: Skype is a big one, around the world.

Rand Brenner: We rarely use the video venture, mostly because we're a face to face organization and when we're out talking to prospects and clients, we still value that face to face.

Barbara Hawksley: So, 50/50.

Audience Member: In the business of HR, are HR certifications beneficial; if they earn those through a community college if it was an industry certification? Are they required for employment?

Richard Carroll: Not necessarily required up front, but it's something that they would be expected to work through if they were to get started.

Audience Member: All right. Beneficial if they came in with certificates?

Richard Carroll: Absolutely. That will open up doors and advance them in their careers as they start out.

Audience Member: From a standpoint of entrepreneurship, many of us offer entrepreneurship certificates at the community college. Do you see value in someone coming in having earned a certificate in entrepreneurship and the skill sets that it can provide?

Richard Carroll: We are a sales organization. We are in the business of prospecting companies and solving problems. I find those with true entrepreneurship skills to have that sixth sense; the ability to communicate and take risk in a conversation. That is so important in our business.

- I work hard to read and understand body language when I sell. That's hard to do through Skype.
- The entrepreneurship classes and background, I think from a sales standpoint, is awesome.

Rand Brenner: Especially from a sales perspective, all of our clients are basically entrepreneurs. So, having that kind of skill set and understanding, just bringing the basic understanding of starting up a business, of what it takes and the diversity of knowledge that it takes would bring a tremendous value in virtually anything they want to do.

Jessica Martini: I see on resumes that someone has earned a certificate or been a part of some sort of program at school. Have them describe what that entails because if I've never heard of it before, it means nothing. Tell me what's so special about it and why you put in so much effort to earn that.

Barbara Hawksley: Thank you everyone we appreciate all of the insights that you has shared with us today. We will adjourn the session at this time.

BUSINESS MGMT.

ADVISOR NAME: RAND BRENNER, LICENSING CONSULTING GROUP

CTE _{cc} ENTRY LEVEL JOBS - BUSINESS MANAGEMENT/ENTREPRENEURSHIP					
INSTRUCTION/SKILL AREAS	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
	IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED				
Marketing & Promotion: Key elements, segmentation, target/niche, strategies, branding, advertising.	A				
Finance/Planning: Budgeting/financial/operating concepts and procedures; Accounting/Bookkeeping, Financial Reports, Costing & Profitability.	B				
Legal Structure: Legal aspects and types of business ownership, licenses and regulatory requirements, Federal/State Labor Laws, Risk Management/Insurances, patents/trademarks/copyright.	A				
Small Business Management/Entrepreneurship: Risks/Rewards of business ownership, creating/operating/expanding, criteria for viable business, international options, business plan.	A				
Operations: Business office/operating processes and procedures, product/services management, employee selection, effective work environment.	C				
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS spreadsheet, CRM, word processing					
EDUCATION REQUIREMENTS (circle): HS=High School Graduation, CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree					
No specific educational requirements;	HS CC	HS CC	HS CC	HS CC	HS CC
degree in business, science or engineering a plus	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS Legal knowledge of contracts; types of intellectual property;					
IP protection process; entrepreneurial					



Industry Advisor Name: Rand

Brenner, *Licensing Consulting Group*

**Business/Marketing/Accounting
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company? Entry level training to learn licensing and IP management.
2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing? unpaid interns would assist me in all areas of my consulting practice - the goal is to teach them about intellectual property, how to manage it and how to make money with it.
3. What technical/non-technical skills are you looking for in the ideal intern? An open mind and willingness to learn. Must be familiar with the concept of intellectual property but this is not mandatory. No specific educational background, although business, engineering, science and technology are all welcome.
4. What technology changes or updates should we incorporate into our courses? There are no schools or classes that teach what I have been doing for the past 30 years. Just about all intellectual property education today focuses on the legal side. Not even the top business schools around the world are teaching how to manage and make money with IP.
The rapid pace of change in IP laws worldwide, and the recognition by governments, corporations, and investors of the value of intellectual property assets has made IP literacy and licensing the new, indispensable skill set of the 21st century. IP management and money making skills are no longer just for some with IP. These are critical skills for today's business owners, CEO's, startups and inventors.

5. Which industry certifications do you value in current and prospective employees? Any of the above mentioned skills.

6. Would you, or your company, be open to supporting any of the following experiences?
(Check)


- Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring

7. Do you have something important to share, or any recommendations, that we haven't already addressed?

Although many inventors, startups and businesses are aware of the growing importance of IP, mastering the intricacies of managing IP takes time. Most have no easy way to learn about the effective use of IP in their business models and strategies.

Knowledge, skills and competencies in managing and licensing IP are in short supply and often very expensive or inaccessible. Inventors, startups, small and medium-sized businesses are especially in need a licensing expertise to avoid the pitfalls and use their IP to increase profitability, value, competitiveness and bottom line success.

ADVISOR NAME: Paul Beakes

 ENTRY LEVEL JOBS - BUSINESS MANAGEMENT/ENTREPRENEURSHIP Administrative Assistant					
INSTRUCTION/SKILL AREAS	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
	IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED				
Marketing & Promotion: Key elements, segmentation, target/niche, strategies, branding, advertising.	C				
Finance/Planning: Budgeting/financial/operating concepts and procedures; Accounting/Bookkeeping, Financial Reports, Costing & Profitability.	C				
Legal Structure: Legal aspects and types of business ownership, licenses and regulatory requirements, Federal/State Labor Laws, Risk Management/Insurances, patents/trademarks/copyright.	C				
Small Business Management/Entrepreneurship: Risks/Rewards of business ownership, creating/operating/expanding, criteria for viable business, international options, business plan.	C				
Operations: Business office/operating processes and procedures, product/services management, employee selection, effective work environment.	C				
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree					
	HS CC	HS CC	HS CC	HS CC	HS CC
	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr	2yr 4yr
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					



Industry Advisor Name: Paul Beakes

**Business/Marketing/Accounting
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. **What Entry Level jobs** could students leaving high school or community college be hired for at your company? **Administrative Assistant to the Operation Manager or Account Managers.**

2. **If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?** **We offer paid internships to assist in clerical work.**

3. **What technical/non-technical skills** are you looking for in the ideal intern? **The applicant must be proficient in Microsoft Office, Word, and Excel. The applicant must have good oral and written skills. Bi-lingual Spanish is extra appealing.**

4. **What technology changes or updates should we incorporate into our courses?** **None at this time.**

5. **Which industry certifications do you value in current and prospective employees?** **An insurance license is very appealing; however we will pay to get that license taken care of.**

6. **Would you, or your company, be open to supporting any of the following experiences?**
(Check)
X Site Tours X Job Shadow X Guest Speaker X Teacher Externships
X Mentoring

7. Do you have something important to share, or any recommendations, that we haven't already addressed? Not at this time.



Orange County Board of Education
1000 N. Main Street, Suite 100
Orange, CA 92668

Comments

1. I am currently a student at Orange County Community College and I am interested in the program of study for the...
2. I am currently a student at Orange County Community College and I am interested in the program of study for the...

3. I am currently a student at Orange County Community College and I am interested in the program of study for the...
4. I am currently a student at Orange County Community College and I am interested in the program of study for the...

5. I am currently a student at Orange County Community College and I am interested in the program of study for the...
6. I am currently a student at Orange County Community College and I am interested in the program of study for the...

7. I am currently a student at Orange County Community College and I am interested in the program of study for the...
8. I am currently a student at Orange County Community College and I am interested in the program of study for the...

9. I am currently a student at Orange County Community College and I am interested in the program of study for the...
10. I am currently a student at Orange County Community College and I am interested in the program of study for the...

11. I am currently a student at Orange County Community College and I am interested in the program of study for the...
12. I am currently a student at Orange County Community College and I am interested in the program of study for the...

ADVISOR NAME: Richard Carroll

CTE _{OC} ENTRY LEVEL JOBS - BUSINESS MANAGEMENT/ENTREPRENEURSHIP					
INSTRUCTION/SKILL AREAS	JOB TITLE: SALES	JOB TITLE: HR CONSULTANT	JOB TITLE: SALES COORDINATOR	JOB TITLE: SAFETY MANAGER	JOB TITLE: IMPLEMENTATION SPECIALIST
	IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED				
Marketing & Promotion: Key elements, segmentation, target/niche, strategies, branding, advertising.	A	B	B	B	B
Finance/Planning: Budgeting/financial/operating concepts and procedures; Accounting/Bookkeeping, Financial Reports, Costing & Profitability.	A	A	B	B	B
Legal Structure: Legal aspects and types of business ownership, licenses and regulatory requirements, Federal/State Labor Laws, Risk Management/Insurances, patents/trademarks/copyright.	A	A	B	C	B
Small Business Management/Entrepreneurship: Risks/Rewards of business ownership, creating/operating/expanding, criteria for viable business, international options, business plan.	A	A	C	C	C
Operations: Business office/operating processes and procedures, product/services management, employee selection, effective work environment.	A	A	B	B	A
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
EDUCATION REQUIREMENTS (dirde): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS (CC) 2yr 4yr	HS CC 2yr 4yr
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					
EXCEL	A	A	A	B	A



Industry Advisor Name: Jessica Martini

Business/Marketing/Accounting Labor Market Survey 2019-2020

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company? **(Please transfer all jobs listed here to the Job Skills form)**

Airport operations (ramp agent, cargo agent, operations agent, provisions agent, customer service agents), phone/email customer service at headquarters.

2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?

Paid internships are for students in undergraduate or masters programs and their work is task-based projects that are intended to solve workflow problems within departments. They are assigned a specific department and a capstone project to improve processes throughout the course of their internship program.

3. What technical/non-technical skills are you looking for in the ideal intern?

Culture is key at Southwest Airlines! We can teach skills, and look for people who have that special something within them that will make them warm and hospitable employees to customers and fellow coworkers. Southwest's commitment to its employees: "We are committed to provide our Employees a stable work environment with equal opportunity for learning and personal growth. Creativity and innovation are encouraged for improving the effectiveness of Southwest Airlines. Above all, Employees will be provided the same concern, respect, and caring attitude within the organization that they are expected to share externally with every Southwest Customer."

4. What technology changes or updates should we incorporate into our courses?

WORK ACTIVITIES/CONTEXT:

- Must be able to meet any physical ability requirements listed on this description.
- May perform other job duties as directed by Employee's Leaders.
- The Customer Engagement Account Manager focuses on growing Southwest Airlines corporate sales revenue for large accounts through effective Team Selling behaviors, including but not limited to: day-to-day account management, traveler initiative execution, securing and leveraging customer insights, traveler research, Customer education and training, creating customized collateral, Customer event coordination, etc.
- The primary responsibilities for the engagement team will be to grow Southwest Airlines market-share and incremental business with large accounts throughout the domestic U.S. and near international markets.
- Customer Engagement Account Managers must complete sales activities and projects on schedule following established procedures.

EDUCATION:

Required/Preferred	Education
Required	High School Diploma or GED
Required	Bachelor's Degree or equivalent work experience

PHYSICAL ABILITIES:

- Capable of lifting boxes up to 50 pounds and the ability to stand for long hours for national trade shows and presentations.
- Ability to perform work duties from desk for extended periods of time
- Ability to use a computer with sufficient speed and accuracy to meet the demands of the job
- Ability to bend, stand, and sit for extended periods of time
- Ability to communicate and interact with others in the English language to meet the demands of the job
- Ability to travel long hallways in large buildings and in between campus buildings

KNOWLEDGE/SKILLS/ABILITIES/WORK STYLE:

- Drive revenue growth, loyalty engagement, and contract compliance through customized strategic offers during contract term in collaboration with Field Team.
- Builds a 3x3 relationship with key stakeholders within the account and becomes a Trusted Adviser.
- Serves as a liaison with commercial partner.
- Actively participates in face to face meetings and conference calls with Field Team to identify account priorities and gain insight into Customer engagement channels.
- Co-creates, executes, and manages ongoing implementation plans for large accounts to meet and exceed contract success metrics and ensures contract fulfillment.
- Schedule and organize meetings with Field Team and/or Travel Decision Makers to ensure follow through and success of implementation plans.
- Ensure frequent, continuous, and effective communication with Field Team and Travel Managers.
- Effectively self-directed to help Sales Team achieve sales performance metrics.
- Must demonstrate the ability to prospect, cold call, and qualify accounts, within and outside the Southwest Airlines network.
- Works collaboratively with the Field Account Managers to Team Sell with the largest accounts and assess opportunities for Customer Engagement
- Ability to confidently represent Southwest Airlines and the Sales Team in internal and external cross functional projects and meetings
- Must establish a working knowledge of the airline industry, with the ability to recognize travel trends.
- Presents self- formulated recommendations for complex problems.
- Must have strong presentation skills and the ability to effectively communicate to large diverse audience and/or executives.
- Must possess excellent organizational skills and demonstrate the ability to handle multiple situations/tasks simultaneously.
- Ability to identify a value-creating opportunities.
- Must be able to communicate effectively, both written and verbal, to internal and external

Customers and executives.

- Must be proficient with Microsoft Office Suite computer applications and a CRM tool (Salesforce.com preferred.)
- Must maintain a professional appearance and demeanor.
- Actively participates in Corporate Sales industry events and conventions as needed.
- Effective proactive networking skills with executives and peers at industry events.

OTHER QUALIFICATIONS:

- Must maintain a well-groomed appearance per Company appearance standards as described in established guidelines.
- Must be a U.S. citizen or have authorization to work in the United States as defined by the Immigration Reform Act of 1986.
- Must be at least 18 years of age.
- Must be able to comply with Company attendance standards as described in established guidelines.
- Must possess a valid state motor vehicle operator's license.
- Must have flexibility to work long hours, including weekends, and travel up to 40% of the time, including some overnight stays.

5. Which industry certifications do you value in current and prospective employees?

None required.

6. Would you, or your company, be open to supporting any of the following experiences?
(Check)

- Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring

7. Do you have something important to share, or any recommendations that we have not already addressed?

I always encourage students to focus on basic, transferrable skills that they can use in any job. These go a LONG way!

- Have a solid resume that is tailored to each job application
- Build out your LinkedIn resume online to help support your resume (we always look!)
- Print some basic business cards on vista print or another website to be able to network at events
- Give a firm handshake, and look people in the eye when you go for an interview

Industry Advisor Name: Rich Carroll - CoAdvantage

**Business/Marketing/Accounting
Labor Market Survey 2019-20
BREAKOUT SESSION**

1. What **Entry Level Jobs** could students leaving high school or community college be hired for at your company? **Potentially telemarketing. Most other positions require some level of experience in various fields.**
2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing? **Any available internships would likely be in Florida out of our corporate office.**
3. What **technical/non-technical skills** are you looking for in the ideal intern?
Ability and willingness to learn quickly. Outgoing personality, able to carry on a conversation with someone they do not know. Ability to perform research about a company/people on the internet.
4. What **technology changes or updates** should we incorporate into our courses?
5. Which **industry certifications** do you value in current and prospective employees? **Human Resources (PHR), HRMP (Human Resources Management Professional), HRBP (Business Professional), Insurance License ((Health & Life, Property & Casualty) – not required but helpful in several positions).**
6. Would you, or your company, be open to supporting any of the following experiences? (Check)
 Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring (Not much to see on a site tour however)
7. Do you have something important to share, or any recommendations, that we haven't already addressed?
There are many great opportunities in this industry. There are many payroll companies where you can learn sales (if that is your desire) and you will receive a great deal of training (PayChex or ADP and smaller local companies). HR is a great field with tremendous upside opportunity.

Business/ Marketing/ Accounting Regional Advisory Board

Marketing Breakout

Friday, November 15, 2019

Cisco Systems 130 Theory, Suite 100, Irvine, CA, 92617

Marketing Representatives in Person:

Steve Getman, Founder, Insignia

Nina Steffen, Owner, NRS Marketing Solutions

Alvin Fong, COO, CIE

Sanjay Dalal, Founder and CEO, oGoing

Marketing Representatives Submitted Data in Person

Patti Larson, SunUp Group

Kathy Johnson, President, Vital Link: Welcome to everyone and we will start with our panel members introduce yourself.

Steve Getman, Founder, Insignia: Formed Insignia earlier this year as a branding and marketing agency.

- I retired in 2018, from a company called Flash Point Communications. I was the chief technical officer and we were about a 35 employee, \$10 million a year advertising agency serving mostly automotive clients. Ford was our largest clients.
- We are focused on smaller business now and we are interested in helping this area grow and be competitive.

Nina Steffen, Owner, NRS Marketing Solutions: For 20 years I worked for the big agencies in Orange County. I saw a disconnect and started my own media agency.

- I wanted to work with partners so I have people on my side that do what I don't do.
- I plan and execute advertising campaigns themselves. I don't do the flashy creative.
- I'm now in the process of hiring, I love what I do, advertising specializing in campaigns.

Alvin Fong, COO, CIE: We're venture studios, we take ideas, build and turn them into a business. We help start up entrepreneurs.

- One of them is a company called Plain School Solutions. They focus on school nutrition, working with 300 plus districts nationally. We partnered with that entrepreneur two years ago, he was doing the coding, selling, account management along with five other people.
 - They were servicing about 50 districts and in two years' time they will be probably close to 100 more by the end of this year.
 - We're busy ramping up and will probably hire another 60 at the beginning of the year. Really building up the platform and help making school nutrition better.
- I've been in technology for a long time and into marketing.
- The company created Paid Advertising, you see the link that Google has popularized. We created it, they took our technology. We won the lawsuit but they won the business.
- I went to Internet Brands and we bought a lot of websites and created a big audience around that.

- I went to a fashion and beauty influencing company on YouTube, where we focused on aggregating all the community fashion and beauty influencers so we were doing almost a billion video views a month through our creators.
- Our goals and passion allow us to create things.

Sanjay Dalal, Founder and CEO, oGoing: Think of oGoing.com as a LinkedIn for businesses, a business community. We are a local community home grown in Orange County. We are closing in on 100,000 businesses now. There are about 3 million local businesses here in Southern California; from Los Angeles, Orange County, Inland Empire and San Diego. Most of them are solo ventures with average earnings of less than \$100,000 a year.

- We try to work on the marketing side and we have a lot of the solo training and help the ultra-small businesses really grow to the next level.
- Many clients started with probably \$100,000 in revenue and they're still figuring out the business models. Over the last few years with us, they have grown multiple times. Some of them have already exceeded the \$1 million mark.
- Dominantly the biggest impairment to the growth is marketing. A lot of students if they have an entrepreneurial slant, they can definitely create some amazing marketing services for these businesses because a lot of the agencies especially the large agencies they would not have the time and resources to go talk to them.
- They would probably say that if you don't have a thousand or a few thousand dollars to spend with us, we really can't scale up with you. But as they're starting out, they have budgets from a few hundred dollars to \$2,000 a month. For them that's a lot of money.
- For an entrepreneur who's coming out of a community college or even high school, if they can create an agency focused on this kind of local business, they can do well. They could help the 3 million small businesses out there. That's what we're trying to do. We're trying to grow the business community online.

Kathy Johnson: Steve, for entry-level positions, you have listed social media coordinator for the community college age student and project manager for someone with a 2-year degree. What kind of projects would they be working on for those kinds of entry positions?

Steve Getman: Social media coordinator, managing the social media presence for a small business.

- It's an entry-level position where you would manage the posting and responding to comments for a number of different business clients. A few years ago when there weren't a ton of people doing it that you could command a decent revenue for this but today there are automated systems now that can do it.
- The project manager gets a project from client approval to completion. They are making sure we gather assets from the clients, logos, images of product, or whatever we might happen to need. They make sure that our internal resources have the things that they need in order to do the work. Managing schedules is critical to the process.

Kathy Johnson: Alvin, you listed digital marketing intern with a 4-year degree for that position. Would you consider someone with an AA degree if they had Excel, Google Analytics and AdWords/Google Ads skills? Those are the skills that you wanted, but are you fixed with that 4-year degree?

Alvin Fong: No, what we look for is the story of the person. Their motivation and what are they trying to do.

- The best opportunity for any internship is for someone to make a goal for themselves. Part of that onboarding process is finding out what they want to achieve in life. Because, I may have other opportunities that would better align with them versus what we just described.
- Our rules are very fungible. You have to find the right mix collectively, all the way from the executive down.
- For a marketing intern, I want someone who is hungry, who has done some research about my company. They have to understand that our path for success is not a clear line, it will zig zag quickly and you need to be able to adapt to that.
- If you're okay with uncertainty, then that's a great environment for you to learn. If you need to have certainty, we are the worst environment for you. It's a process to figure that out.
- We have to be really dynamic. For interns, if it's from a marketing standpoint, they need to understand what you're seeing around you. What do you see in your Facebook feed, tick tock and Instagram and why did they see it that way? What are the video assets? For our partners, how do we present their products in a way that you actually want to watch?
- In the world we live in, it's all about passive consumption; in Facebook feed, YouTube, Instagram and you're just watching stuff. Our challenge is to find a way to integrate products in a fun way so you get exposed to that experience, but you don't feel like you just watched a commercial.
- That's the secret sauce of digital marketing. It's content that is a blend of being sponsored by a company, but it's entertaining.
- Red Bull does a really great job. With a global brand and has a global production. They focus on selling stories and now everyone is a friend. GoPro is another one.

Kathy Johnson: You listed four different positions that would be at that entry level: administrative assistant, junior account executive, junior media planner, and junior media buyer. Is that entry level considered high school or community college?

Nina Steffen: All college. We have a new law with independent contractors, we're not allowed to hire them anymore so we are going through that process with lawyers. Ideally, I would like those four positions filled by next year. Those are very support driven positions.

- I'm old school, I use Excel. I'm a number driven company; if you spend \$10 million dollars, you better get that right.
- For entry-level, they would not be client facing. It would be very administrative and it can be internship related.
- I've seen people that are 25 that are doing well in this industry. I speak at schools. It's a great opportunity to shake a hand and see someone who is really interested in shadowing me and learning what I do.

Kathy Johnson: Do any of you belong to marketing professional associations and do they invite college students or students to come to those?

Nina Steffen: Yes, AMA is a great one.

Sanjay Dalal: AMA they do, but not many students show up.

Nina Steffen: The students that do come get my attention. I'd get their cards and network with them.

Kathy Johnson: They're showing initiative. From the educators' perspective, having those students participate, even if they were still in high school, they can start networking. They may not be hired now, but they would be able to start that relationship process. We've seen in other areas where high school students have reached out, and because they showed initiative, they were brought into situations that would not normally have been available to a high school student.

Nina Steffen: The biggest one is AMA, American Marketing Association. I have met people who are in their 20's and I say give me your card and they're very interested. I do a lot of public speaking at Universities. The one's looking and taking notes, I ask to talk to them afterwards. The other ones on their phones, I don't seek. Have them network. I've networked for 10-15 years and that's why I'm where I'm at today.

Kathy Johnson: I think if there was a way that the schools could help students create their elevator speech. You're asking them a few key questions and that's the informational interview elevator speech. That gets the conversation going.

Nina Steffen: I'll add communication, reliability, and honesty, they like what you do and some degree or working on getting a better one. Those four things are what I want. It's so hard to find; and with owning your own business you're not going to find someone who has your same passion.

Kathy Johnson: They do exist. You work through it.

Nina Steffen: I've heard that.

Kathy Johnson: One of the things that you mentioned was that the type of support interns would be providing for customers online: SEO, PPC, SMO, CM?

Sanjay Dalal: I think marketing is more about curiosity. If the person is not curious, then they cannot be great at marketing. Curiosity begins with asking questions.

- You really have to go deep down and say who is this customer, what is the studio serving, who is their customer, and where are the customers, where do they hang out? All those things happen when you're curious, but when you're not, then you're trying to go there and write content and you don't know what you're doing.
- Communication and the ability to care for customers and the ability to collaborate are important.
- Some of the students have this, but a lot of them just want things quickly.
- Coming back to your questions what are all those buzz words?

Q: Kathy Johnson: Are the acronyms mandatory? Which ones are the most important that we want to make sure that are taught in school?

Sanjay Dalal: If I'm a business, all of them are important.

- SEO, Search Engine Optimization, has the ability for my website to get ranked higher so if someone is looking for a local plumber, I want to make sure my site is on the first page.
- PPC is advertising related, Pays Per Clicks.
- If you are going to have businesses advertise online, you go to buy from Google or other search engines as well as on social media and you should know then what the outline of those ads is. What is the content that's going to go into their eyes? CM is Content Marketing.
- All of those things related to SMO, Social Media Optimization, matters for a business.
- Ultimately in our business, I need to go where my clients are. Today, a business doesn't have the luxury to wait for the clients to come. There is so much competition.
- From the website, through running social media, advertising, doing local, all of that matters now. And of course, content is the most important and how we communicate.

Steve Getman: All of those are important because different tactics work well for different types of businesses and different audiences. For one, search engine optimization might provide them with the leads that they need because there's enough people looking for their niche that they don't need to pay for advertising not very often anymore. But for others, you might need video to show the features of the product or the service, it's different for every business.

Kathy Johnson: What education level would you hire?

Sanjay Dalal: I would say most students can learn all of this, if there's curiosity and they work with an experienced marketer which most of us here are. We can easily share with them the things they should be doing and inform them of the online classes available for certifications. It all begins with their willingness to put in the time.

- When it comes to creativity, not everybody is creative. I'm not sure if that can be taught. Maybe that's something the schools can do a better job teaching during the classes.

Alvin Fong: Across all media, creativity matters a lot.

Nina Steffen: Marketing is a great field because you can use it in sales.

- I'm a salesperson even though I'm in marketing. I tell people who are going through courses to look at marketing, it's like psychology.

Sanjay Dalal: On the creative part I will add, there are so many applications available on your phone. An average person can be creative; you can easily shoot a video right to your phones. You can quickly do some editing, add some titles to it, and blend some photos into it and now you have great content and you can immediately share.

- In today's world, you don't have to be a perfectionist. You can actually create something good enough and put it out there because your customers understand that what you're

sharing is something fun and exciting for them. That's good enough for them to engage them.

Nina Steffen: There's an ad for Doritos with no name or a logo, just the red bag and the chips. It is fun, that is my point. If you have someone struggling with "what should I do?" Pick advertising! Marketing is good. Business and marketing are great avenues for someone who's not sure.

Alvin Fong: For your students the fastest way is video editing, the one skill set everyone needs to have.

- At the end of the day, all these tactics are just tactics. And with creative we focus on how do I break through the noise. The noise is everything around. If you think about your Facebook feed, we could have the best video ever and we worked months on it. If I have two seconds to get your attention and I miss it, it's gone.
- For us it's, about rapid iteration of content. Speed is more important than perfection.
- Vine said a few years ago that it's 6 seconds because people don't have an attention span. You don't need to work with this quick arc of a story, you just need to get to that point really quickly.
- The math behind it is how to be judicious when you spend. Figure out what your audience does and there's a lot of tools out there today.
- I think that's the piece helping people understand that you can do everything through your phone and you don't need a college education. The college education gives you structure of thinking. In terms of a skill set, you can go and immediately work. We're trying to hire someone at a more senior level but video editing is a piece of that because you need to turn assets really quickly.
- We have a creative department but I need a speed boat not a cargo ship. The cargo ship tells brand stores but takes a long time to get there. It travels further distance but for fast iteration I need to show videos multiple times. That's the challenge of marketing. Kids get that today because they're on multiple applications, they know how to multi task.

Kathy Johnson: Shifting into those technical skills, you were talking about video editing and Nina you were talking about the Microsoft applications that were a must have. Give us some information about what are the technical skills that you need.

Nina Steffen: I use Office 360 because media is numbers driven. Some of the research tools we can get from other places. It's how you write an email and it's how you can transfer data to Excel or be client friendly. So, it's not really tech skills, it's more of being client facing and figuring out what should that look like. I pull information out and make it look pretty. That's what I do all day.

Kathy Johnson: Data analytics, for those of you who want to go to the professional development workshop we talked about earlier and get your certificate so you can get students knowledgeable about accessing and sharing data. They would be very good candidates for her.

Nina Steffen: I would love it.

Kathy Johnson: What technical skills do entry-level employees need to have in order to come into the industry on the front line?

Steve Getman: Office. Google has applications that are online and free. Conceptually just knowing how a spreadsheet works especially how to use formulas because you can automate a lot of stuff that will save you tremendous amount of time.

- The number one database platform in the world is Excel. There is a ton of data in Excel throughout the business world and being able to find it and get it, to pivot tables, and view look ups.
- Being able to write a business email I think is a very important, you can communicate quickly but you may offend somebody who is old school who wants someone to speak in proper English.

Nina Steffen: Exactly, no emojis in our emails.

Kathy Johnson: We have an example recently in our office where someone sent an email and I read it one way. I showed it two other people and they interpreted it completely different. It was instructional, something they wanted us to do as a contractual thing having to do with the service that we were going to provide. I called them into my office and then we called the client to clarify and it turns out that we were all wrong. That's a serious problem when you're dealing with customers.

Steve Getman: You need to be precise in your communication.

Nina Steffen: I get texts from my clients now, I want it in writing but I'm not keeping your string of texts. Clients text me all the time and it's hard so you've got to set boundaries. A text can be read in 10 million different ways.

Steve Getman: Text messages a great way to have a 2-minute conversation over the course of a couple days.

Kathy Johnson: Yes. That quote is golden.

Sanjay Dalal: Regarding the technical skills on the creative side, there is a lot of software out there but I think the one that students can really get their hands on is Adobe Photoshop. It's the gold standard.

Kathy Johnson: That's the universal.

Sanjay Dalal: If you know Photoshop well, there are other tools available that are similar on a smartphone or iPad.

- If your student wants to be creative on the marketing side and create this great looking graphic design for flyers, Photoshop would be up there. If you want to do something fun and quick, students have a lot applications available on the phones.

- I use and like the Adobe systems, I use another called Adobe Spark, and it has two applications; one for folders or posting on social media and the second one is for Adobe Spark videos. iMovie's are also done on the iPhone very easily.
- It's all about mixed media now, as long as you are eager and curious to play with applications.
- I do a monthly round table online and we had a couple of speakers who came from YouTube and Facebook channel. For them, to create a 2 to 10-minute video on their iPhone takes them four days to make. They do a new video every week and have over a million subscribers. I would say they're making a quarter million dollars a year off of advertising and they're just two guys. They have their own brand now they're selling t-shirts, they're called Crazy Gorilla.
- For the 30 second ads you see on TV, they take multiple weeks to months of effort to do. You have that side of marketing too.

Kathy Johnson: Alvin, looking at your form you had a number of things under the technical skills, data analyzation, manipulation of photos via Photoshop, copywriting for long and short-form content as well as Excel. Can you expand on that?

Alvin Fong: Develop career in storytelling, you have to understand the story that you are trying to tell.

- When we hire, I'm looking for that story, why did you do these 5 different jobs? It could have been I had to take the job because I was the only one who could make money for my family. That shows me grit, hustle, responsibility and then what are you trying to do. I think it's not just what you're doing today, but what you want to do.
- You cannot use some of these software tools without understanding data. That means it's not just data but math. You have to be able to add and make sure those numbers are right.
- It doesn't mean there's one person to do it all but you have to be aware. We call it full-step awareness. Some people program the website on the front, others do all the back-end calls and data. But you have to be aware of what your other partners are doing.
- The goal is always the story. What is the story we are trying to tell and how do you get there? Those are all the soft skills that are really challenging.
- Resumes don't always tell a story, that's a skill schools can really work on. As you're writing a resume you could say I was responsible for these x number of things: closing the store and making sure the cash register tied out. Those are things that show that you have a really great skill set. It is not just that you showed up.
- One interview question I ask my candidates is when was the first time you got a job? Most of the time it's high school, all of the successful one's have been high school and I say "okay great, tell me what you learned in that job that you still hold near and dear to you in your career." A lot of them will have really great insights, including understanding that they don't want to do this job for the rest of their life.
- As you think about teaching your students or building these programs, those are the things that will work for them post-school education. Education is a lifelong process.

Sanjay Dalal: We have a weekly review of the Excel data where we track the number of incoming lead calls the client gets and we look at where are the calls coming from. We break it down from each channel they came from: eChannel, Facebook, referral, etc.

- When the client calls me this week to find out why the call volume is low, I can back that up because now I am looking at the data from the previous year and looking at how many leads we were getting. In spite of all of that, if the lead volume is still low, we start thinking about what else we should be doing. That's the data analytics side which is very important in marketing. It's not all about creating content. You should also have that slant of I take that data and I can make some decisions.

Steve Getman: Talking about learning the concepts, the analysis and being able to look for problems is more important than the tools because the tools are all going to change. It's more important that they learn how to think than how specifically to do something because each of us probably has a different way to do things and we'll teach them that when they come work for us.

Nina Steffen: That applies to adults too. We have no attention span. We're checking boxes so many times. Have passion behind your work, it's not checking boxes.

Alvin Fong: One hypothetical question I give to entry-level people is, "If you're small person trapped in a big blender, how do you get out?" The answer in life is you've got to keep pushing. If you thought the right answer, keep going and keep working. Rejection will be 95 percent of your life. In sales that's a great day, 95 percent. You have to be able to process that, keep going, don't be discouraged but listen and don't give up.

Kathy Johnson: Resilience is very important.

Nina Steffen: It's critical.

Kathy Johnson: Alvin, you listed testing tools?

Alvin Fong: In all these the answer would be there's always going to be more tools, there's always going to be things that will make your life easier.

Kathy Johnson: I realize those change but the students have to practice on something. So, which of those tools do you see as being valuable for them to be able to play around with to get started?

Alvin Fong: Excel for sure, Google Analytics and then understand Facebook at a minimum. If you understand those three things you have a really good entry point. All the other things get very nuance and niche and more expert level.

Sanjay Dalal: Instagram now.

Kathy Johnson: Some of you were listing certifications, any that you value?

Alvin Fong: I never look at certifications. We can have an open-ended conversation until we can't come to an answer anymore. What drives you, what motivates you?

Sanjay Dalal: In regard to testing and email, we all get many emails a day but there are only very few that we open. You ask yourself why did you open it? That has to do with psychology. It is the email subject line and what is right below it and that's what we most likely would be testing.

- Email marketing will do an A/B email campaign like two different emails or subject lines. Let's say you have 1,000 subscribers; you will send two different emails to a test group of 100. One with a subject line which is called A that goes out to 50 people and a second group of 50 receive the subject line called B.
- You may keep the same line below that so you manage your variables. You have the tools to check the results between the two emails. You can see which email is being opened more and which email is being interacted with more. By interacted I mean who's clicking on it and doing things, a call to action. The one that has more interaction and openings wins out. For the other 900 people, you send the winning email. A lot of good email marketers will do that again and again. As they get better, they will have a better sense of what to send.

Kathy Johnson: How do you use machine learning?

Alvin Fong: Right now we have two startups focused on elder care.

- We think that within the next 3-5 years, there will be more elderly people needing care than there are providers or volunteers. One thing is understanding that it involves sensors, so it's a little more complicated. When you put sensors in the room and see that there's certain behavior or physical activity they are doing, we have enough data points that we can actually identify the onset of an illness before it happens. We need machine learning at that point because there can be a lot of data points.
- We also have a startup focused on improving police safety. You have to be able to rapidly recognize your situation. Most police officers that die in the line of fire during their first 5 years of learning their job if they haven't been able to recognize a domestic dispute. So, it's not only you addressing the person who may have created the situation but if you go arrest them, the person who called 911 may attack you as well. You have to be really aware of the stuff. So, for us machine learning is really important because we're looking at all the direct camera footage and working with the police department to understand the patterns.
- There are a lot of different tools, it depends on what you're trying to build but it's about taking all those rapid data points so we can inform whatever the solution is. This is the likely outcome or these are the things that you need to work on as a police officer to make sure you ensure your own safety and that of those around you.

Kathy Johnson: The curriculum that's used in the classroom around problem solving is typically that you're given a problem and now you come up with a solution. What I hear in your conversation is recognizing a problem. I see this within my own world with people I work with they will actually step over the problem and not see it even though the same thing comes up multiple times and there's a pattern here. Changing that model to adding the component of how do you recognize when there is a problem so that you go into problem solving mode.

Alvin Fong: There are multiple layers of problems, we all deal with clients; they may send an email about something they are unhappy with but that's probably not the main reason.

Kathy Johnson: It's not the core issue.

Alvin Fong: We can answer all those questions and they're still unhappy. The answer is that wasn't the reason they were unhappy, there's some other issue. So it's all a misunderstanding but why are they really upset? How do we make sure there's more happiness? There's always that mess, but what the overarching thing is that there might be a concern and they don't know how to express. So it's about communication and soft skills. Most people will focus on the anger but they don't focus on the trigger for the anger.

Kathy Johnson: And even if someone says why they are angry, that may not be the core issue.


Alvin Fong: Right, sometimes they don't recognize it at all.

Steve Getman: Every business exists to solve problems, there are a ton of opportunities out there that get missed because people don't recognize problems or they're just so focused on the task at hand that they don't see the elephant sitting in the room. In my last business, we lost a 1.2 million-dollar a year client because our account manager didn't recognize that the client was unhappy. They were happy to her face when we met with her, but she didn't speak to the client and find out what was really important and find out how we were measuring up against those benchmarks. They eventually went away and went with another company.

Sanjay Dalal: A quick point on machine learning. I don't know how many schools are teaching that but artificial intelligence (AI) is a big now. AI and machine learning are becoming more mainstream. I think we should not look at AI as taking over jobs, I would rather think of students leveraging AI and understanding AI.

- Using AI to help business make better decisions.
- I had a client where we used a particular channel for marketing and advertising. From one month to the next the number of leads that we were expecting dropped by 50 percent. One simple reason that we found eventually was that the cost per lead went up by 40 percent. Now if we had AI systems helping us along with our data from the previous years we could easily have fed that data into our budget and looked forward seeing potential red flags happening this month.
- Students need to start thinking about using AI to look at the data and project forward. You need to get that and help start helping your students understand that and get them ready. AI is the next big wave and that's where the world is going.

Kathy Johnson: This has been a great session with all of the great information your panel has shared with us today. We are going to take a break now so let's give a round of applause to our panel. Take a moment to connect with them directly during the break.

 ENTRY LEVEL JOBS - MARKETING-E-COMMERCE					
INSTRUCTION/SKILL AREAS	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
	Digital Marketing Intern				
IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED					
Marketing Processes: Research & analysis, market segments, targets, plans/strategies, product image, pricing, reporting & control, product development.	A				
Marketing/Ecommerce: Internet/Ecommerce business standards, political environment, laws and regulations, success analysis, create online store, marketing strategies, customer service, ordering, fulfillment, shipping.	B				
Marketing Principles: Marketing process & function, laws & regulations, marketing mix, marketing ethics, international trade, cause marketing.	A				
Advertising and Promotion: Promotional plans, marketing communication tools, media, create copy, releases, website, reports.	A				
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr
Excel	A				
Google Analytics/Adwords	B				
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					




Industry Advisor Name: Alvin Fong

Labor Market Survey 2019-20

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company? Digital Marketing Intern
2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?
 - a. Typically interns at Cie get hands on experience working on actual project or startup ventures. The work ranges from analysis of data from marketing campaign performance to product test user feedback, content creation from social media post copy to ecommerce product information, and strategy from social media engagement to event activation.
3. What technical/non-technical skills are you looking for in the ideal intern?
 - a. Technical: Data analyzation and manipulation via excel, photo manipulation via photoshop or similar tools, and copywriting for long and short form content.
 - b. Non-Technical: Strong communication (verbal and written), excellent work ethic, outside of the box thinking, solutions-oriented mindset.
4. What technology changes or updates should we incorporate into our courses?
 - a. Utilization of data analysis/extraction/gathering tools outside of excel – KISS Metrics, Google Analytics, Site Catalyst, or other tools.
 - b. A/B testing tools like Optimizely, VWO, Adobe Target, or Everygage.
 - c. Machine Learning tools like Scikit Learn, Pytorch, Accors.NET, or Shogun
5. Which industry certifications do you value in current and prospective employees?
 - a. Google AdWords Certifications
 - b. Adobe Certifications
6. Would you, or your company, be open to supporting any of the following experiences?
(Check)
x Site Tours Job Shadow x Guest Speaker Teacher Externships
 Mentoring
7. Do you have something important to share, or any recommendations that we have not already addressed?
 - a. No this has been a great exercise and we are excited to help develop the future generations to come!

 ENTRY LEVEL JOBS - MARKETING-E-COMMERCE					
INSTRUCTION/SKILL AREAS	Intern	Consultant			
	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:	JOB TITLE:
IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED					
Marketing Processes: Research & analysis, market segments, targets, plans/strategies, product image, pricing, reporting & control, product development.	A	A			
Marketing/Ecommerce: Internet/Ecommerce business standards, political environment, laws and regulations, success analysis, create online store, marketing strategies, customer service, ordering, fulfillment, shipping.	B	A			
Marketing Principles: Marketing process & function, laws & regulations, marketing mix, marketing ethics, international trade, cause marketing.	B	A			
Advertising and Promotion: Promotional plans, marketing communication tools, media, create copy, releases, website, reports.	A	A			
Digital Marketing - A to Z	A	A			
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
	Adobe PS	PDF / PS			
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr	HS CC 2yr 4yr
	Varies	Certificate			
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					



Industry Advisor Name: Sanjay B Dalal

**Business/Marketing/Accounting
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company?

Digital and Social Media Marketing

2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?

Helping our local clients with online marketing – SEO, SEM, PPC, SMO, Email, CM, etc.

3. What technical/non-technical skills are you looking for in the ideal intern?

Writing. Communications. Graphic Design. Local Industries. Customer Needs.

4. What technology changes or updates should we incorporate into our courses?

Local OC Industries and their Customers. What helps local businesses grow? ABC's of Marketing and particular focus on Online / Digital / Social Media Marketing.

5. Which industry certifications do you value in current and prospective employees?

Digital Marketing / Social Media Marketing / Digital Advertising

6. Would you, or your company, be open to supporting any of the following experiences?
(Check)

- Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring

7. Do you have something important to share, or any recommendations, that we haven't already addressed?

All for now

ADVISOR NAME: Steve Getman



ENTRY LEVEL JOBS - MARKETING-E-COMMERCE

INSTRUCTION/SKILL AREAS

JOB TITLE: Account Coordinator
 JOB TITLE: Analytics Coordinator
 JOB TITLE: Social media Coordinator
 JOB TITLE: Project Manager
 JOB TITLE: Media Planner

IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM:
A=REQUIRED B=DESIRABLE C=NOT REQUIRED

Marketing Processes:

Research & analysis, market segments, targets, plans/strategies, product image, pricing, reporting & control, product development.

B A B B A

Marketing/Ecommerce:

Internet/Ecommerce business standards, political environment, laws and regulations, success analysis, create online store, marketing strategies, customer service, ordering, fulfillment, shipping.

B C A B A

Marketing Principles:

Marketing process & function, laws & regulations, marketing mix, marketing ethics, international trade, cause marketing.

A B A B A

Advertising and Promotion:

Promotional plans, marketing communication tools, media, create copy, releases, website, reports.

B C A C A

SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS

EDUCATION REQUIREMENTS (circle):

HS=High School Graduation; CC=Community College Certificate;

2yr-AA/AS Degree; 4yr-BA/BS Degree

HS	CC	HS	CC	HS	CC	HS	CC
2yr	<u>4yr</u>	2yr	<u>4yr</u>	2yr	<u>4yr</u>	2yr	<u>4yr</u>

MS Office

A A A A A

Email

A A A A A

ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS

Written Communication

A A A A A



Industry Advisor Name: Steve Getman

Business/Marketing/Accounting
Labor Market Survey 2019-20

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company? (Please transfer all jobs listed here to the Job Skills form)

Social Media Coordinator

Project Manager

2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?

We do not currently have an internship program.

3. What technical/non-technical skills are you looking for in the ideal intern?

Social media platforms

Good communication skills (both written and verbal)

Problem identification and solving

4. What technology changes or updates should we incorporate into our courses?

Not sure - possibly marketing automation (high level concepts)

5. Which industry certifications do you value in current and prospective employees?

Google Analytics

- Adwords

Facebook Blueprint

6. Would you, or your company, be open to supporting any of the following experiences? (Check)

Site Tours

Job Shadow

Guest Speaker

Teacher Externships

Mentoring

7. Do you have something important to share, or any recommendations that we have not already addressed?

Automation is going to continue to be a factor in entry level jobs. Being able to understand and work with those tools will be critical in my opinion.



Industry Advisor Name: Nina Steffen

**Business/Marketing
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company? **(Please transfer all jobs listed here to the Job Skills form)**
 - a. Administrative Assistant
 - b. Junior Account Executive
 - c. Junior Media Planner
 - d. Junior Media Buyer
2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?
 - a. Creation of insertion orders
 - b. Communication with media vendors
 - c. Creation of pre-logs and post log reports
 - d. Uploading creative to each vendor
 - e. Scheduling appointments/conf. calls
 - f. Updating status reports
 - g. Researching of new media opportunities
3. What technical/non-technical skills are you looking for in the ideal intern?
 - a. Strong experience in:
 - i. Excel
 - ii. PowerPoint
 - b. Strong communication skills
 - c. Reliability
 - d. Problem solving
4. What technology changes or updates should we incorporate into our courses?
 - a. I do not have any suggestions at this time
5. Which industry certifications do you value in current and prospective employees?
 - a. I do not at the moment. Most learning is hand's on experience
6. Would you, or your company, be open to supporting any of the following experiences?
(Check)
 Site Tours Job Shadow Guest Speaker Teacher Externships
 Mentoring
7. Do you have something important to share, or any recommendations that we have not already addressed?
 - a. This is an amazing and impressive program and I do not have more to share at this moment. Great job!



ENTRY LEVEL JOBS - MARKETING-E-COMMERCE

INSTRUCTION/SKILL AREAS	Marketing Analyst JOB TITLE:	Marketing Assistant JOB TITLE:	Communications Assistant JOB TITLE:	Brand Development JOB TITLE:	Social Media Assistant JOB TITLE:
IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED					
Marketing Processes: Research & analysis, market segments, targets, plans/strategies, product image, pricing, reporting & control, product development.	A	B	A	A	B
Marketing/Ecommerce: Internet/Ecommerce business standards, political environment, laws and regulations, success analysis, create online store, marketing strategies, customer service, ordering, fulfillment, shipping.	A	B	A	A	B
Marketing Principles: Marketing process & function, laws & regulations, marketing mix, marketing ethics, international trade, cause marketing.	A	B	A	A	B
Advertising and Promotion: Promotional plans, marketing communication tools, media, create copy, releases, website, reports.	A	B	A	A	B
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
NA	B	C	B	B	C
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS <input type="checkbox"/> CC <input type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input type="checkbox"/>
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					

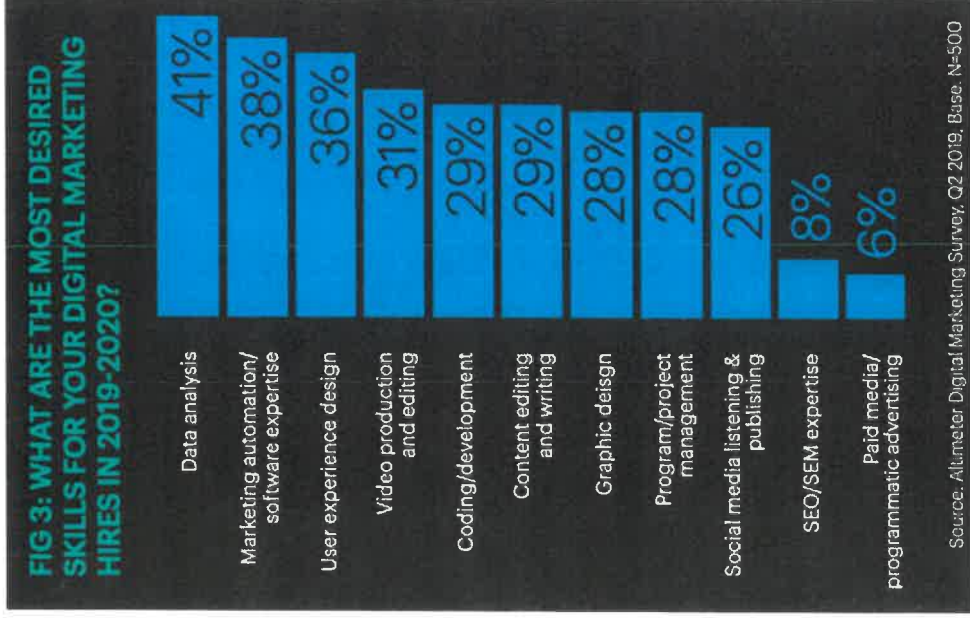


**Business/Marketing/Accounting
Labor Market Survey 2019-20**

BREAKOUT SESSION

1. What **Entry Level jobs** could students leaving high school or community college be hired for at your company?
Marketing Analyst, Marketing Assistant, Communications Assistant, Brand Development Assistant, SEO Analyst, Social Media Assistant
2. If your company offers paid or unpaid internship opportunities, what type of work do you have the interns doing?
Each of the above roles. Typically the intern would shadow an experienced brand, marketing and strategy expert at our firm and attend online and in-person training. We provide extensive materials, podcasts, webinars for the interns to review. Depending on their skill set, they would start by conducting research (analyzing client competitors), review and research data (per our road map) and go through their own skills assessment and training.
3. What technical/non-technical skills are you looking for in the ideal intern?
Data analysis, critical thinking, software expertise, user experience, SEO Skills, Content Development, Personal Development, Personal Brand Development, Video Development. Soft skills: Listening, strategic thinking, attention to detail, quick learner and motivated to learn and grow.
4. What technology changes or updates should we incorporate into our courses?
Students will benefit from learning data analysis skills and start with Google Analytics and Google Search Counsel as these are two basic data analysis tools available at no cost and every consumer can benefit from having this knowledge. Software Content writing is a highly marketable skill, however writers need to learn the psychology behind sales copy and understand how to develop customer personas. Another skill is to help students understand the value of a personal brand and start by developing their own in humanizing their brand and unique personality starting with the resume and cover letter.
5. Which industry certifications do you value in current and prospective employees?
None in particular.

What skills are employers looking for



- Improving their data-driven marketing is an aim of many businesses indicated by the most desired skill amongst digital marketers revealed by the Altimeter/Prophet State of Digital Marketing report.
- Marketing automation software experience is the 2nd highest skill that employers are looking for (HubSpot, Marketo, Pardot, etc.)
 - Also Salesforce Marketing Cloud
- Top Ecommerce skills:
 - Software development (SAP Hybris, Sitecore, Magento are top)
 - SEO skills: copywriting, data analytics, A/B testing, and an in-depth understanding of keyword use and content marketing.
 - Data analytics

<https://www.smartinsights.com/managing-digital-marketing/marketing-innovation/6-essential-marketing-trends-for-2020/>



ENTRY LEVEL JOBS - MARKETING-E-COMMERCE

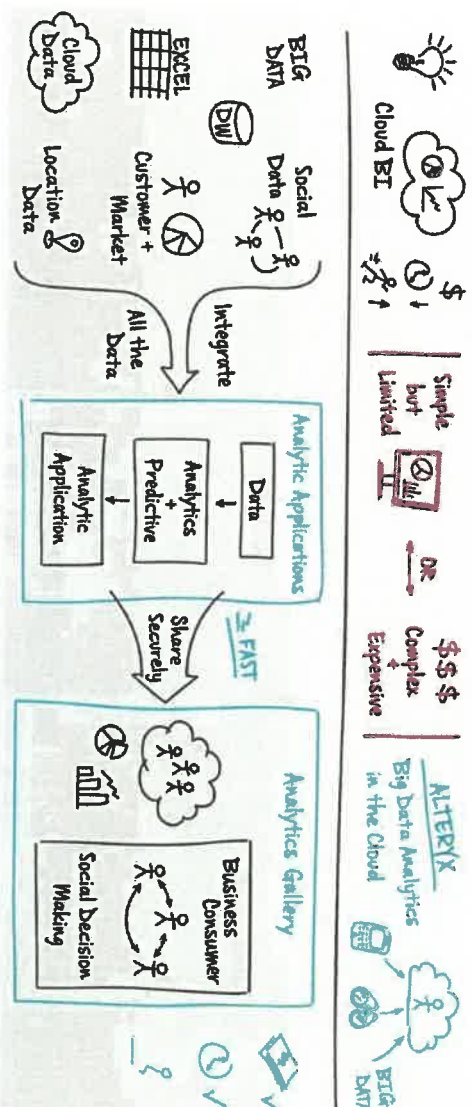
INSTRUCTION/SKILL AREAS	Marketing Analyst JOB TITLE:	Marketing Assistant JOB TITLE:	Communications Assistant JOB TITLE:	Brand Development JOB TITLE:	Social Media Assistant JOB TITLE:
	IDENTIFY BELOW THE SKILL/KNOWLEDGE REQUIREMENTS FOR EACH JOB TITLE USING THE FOLLOWING RATING SYSTEM: A=REQUIRED B=DESIRABLE C=NOT REQUIRED				
Marketing Processes: Research & analysis, market segments, targets, plans/strategies, product image, pricing, reporting & control, product development.	A	B	A	A	B
Marketing/Ecommerce: Internet/Ecommerce business standards, political environment, laws and regulations, success analysis, create online store, marketing strategies, customer service, ordering, fulfillment, shipping.	A	B	A	A	B
Marketing Principles: Marketing process & function, laws & regulations, marketing mix, marketing ethics, international trade, cause marketing.	A	B	A	A	B
Advertising and Promotion: Promotional plans, marketing communication tools, media, create copy, releases, website, reports.	A	B	A	A	B
SOFTWARE REQUIREMENTS: ADD AND CHECK ANY SPECIFIC SOFTWARE REQUIREMENTS					
NA	B	C	B	B	C
EDUCATION REQUIREMENTS (circle): HS=High School Graduation; CC=Community College Certificate; 2yr=AA/AS Degree; 4yr=BA/BS Degree	HS <input checked="" type="checkbox"/> CC <input type="checkbox"/> 2yr <input checked="" type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input checked="" type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input checked="" type="checkbox"/>	HS <input checked="" type="checkbox"/> CC <input type="checkbox"/> 2yr <input checked="" type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input checked="" type="checkbox"/> 2yr <input checked="" type="checkbox"/> 4yr <input type="checkbox"/>	HS <input type="checkbox"/> CC <input checked="" type="checkbox"/> 2yr <input type="checkbox"/> 4yr <input checked="" type="checkbox"/>
ADDITIONAL REQUIREMENTS/CERTIFICATIONS: ADD AND CHECK AND ADDITIONAL REQUIREMENTS					



Professional Development Workshop Citizen Data Scientist/Data Analytics

Calling all instructors interested in Data Analytics!

Attend professional development workshops to gain knowledge in Alteryx's data analytics platform and strengthen your skills in Data Analytics with hands-on demos and training. By the end of the training series, you will be ready to pass Alteryx's certification test.



Dates and Times are TBD

Two training series of 3 workshops will be coordinated by the Vital Link team in partnership with Alteryx staff.

SAVE YOUR SPOT NOW!

<https://forms.gle/Vkuszc3sC85P9VVRp9>

Questions?

Aranxa Guillen

Aranxa@vitalinkoc.org

CE Program Director

POWERED BY

alteryx

 Vital Link
Explore Discover Connect

CALIFORNIA COMMUNITY COLLEGES
 LAOCCRC
Los angeles | orange county regional consortium



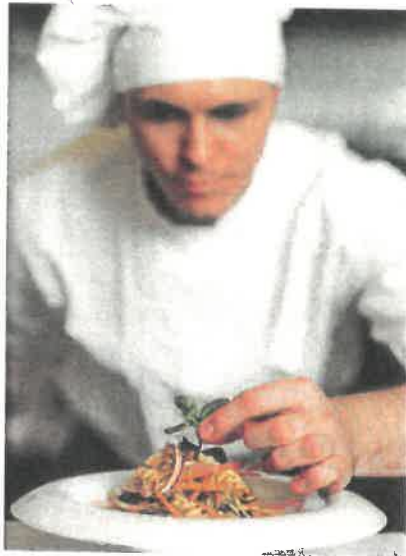
California Community Colleges

Ready, Set,
Cook!



Vital Link
Explore Discover Connect

Culinary Competition



Showcase your creative Hors d' Oeuvres AND Desserts at Vital Link's exclusive VIP Celebration & 25th anniversary at the OC Fair & Event Center!

Meet hundreds of our industry partners, Orange County School Leaders, and local community members at our VIP Celebration during our STEAM Career Leadership Conference. Wow our guest judges with your culinary crafts at our biggest celebration of the year!

Thursday, April 16, 2020

4:00 pm to 6:00 pm (Set up starts at 3pm)

VIP Celebration

OC Fair & Event Center

88 Fair Dr.

Costa Mesa Building #10

Costa Mesa, CA 92626

Open to all Orange County
High School and College Culinary Programs

Categories:

Hors d' Oeuvres
Desserts

Registration Fees: \$100

Click [Here](#) for Intent To Participate

EXCLUSIVE Q&A WITH JUDGES



For more information,
contact:
Neda Arab
Neda@Vitalinkoc.org
(949) 646-2520

 **Vital Link**

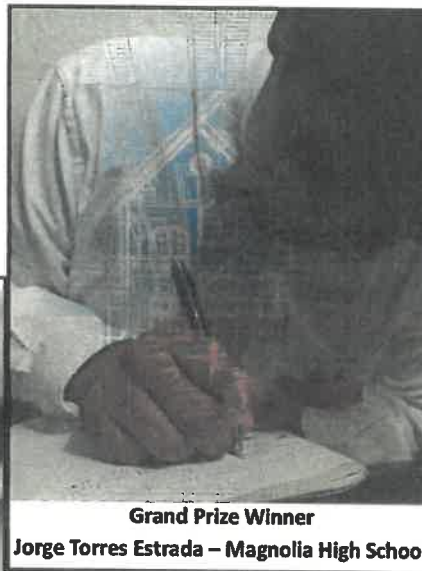
2020 My Dream Career Photo Contest

Now is your chance to show Vital Link & the world what you want to do as your "Dream Career". Whether you want to be an auto mechanic or veterinarian, a doctor or a singer, the possibilities are endless! Have someone snap a picture of you demonstrating your "Dream Career" & you could win up to \$150! Interested? All students between the ages of 12 and 25! Do you want to tell the world to know what your aspirations are...

All winners will receive statewide recognition in Northern & Southern Divisions!

Grand Prize - \$150
1st Place - \$100
2nd Place - \$75
3rd Place - \$50

All final submissions DUE:
Friday, February 14, 2020
5:00 pm



[Click Here To Submit](#)

[Click Here for Official Rules](#)

 **Vital Link**
Explore Discover Connect

Questions
Neda Arab
CE Programs Coordinator
Neda@vitallinkoc.org
(949) 646-2520

Energy Invitational

UCI Samueli School of Engineering, Vital Link, and Southern California high schools are collaborating to provide STEAM education in a hands-on, project-based learning environment through student participation in a performance engineering program. Students will build a one person, fuel-efficient vehicle and run it in a timed trial; while displaying & developing skills in manufacturing and assembly, computer modeling, engineering, analysis, research and testing and personnel/cost management.



Design Review Winner Presentations - April 2020

STEAM Career Leadership Conference
at the OC Fair & Event Center

Safety Inspection: 8:00 am-2:00 pm

Location—TBD

Competition Day: 8:00 am-4:00 pm

Location—TBD

Contact:

Neda Arab
CE Program Coordinator
(949) 646-2520
Email: neda@vitallinkoc.org

Click [HERE](#) to complete an Intent To Participate form

Click [HERE](#) to complete the Official Registration form





irvine career discovery day

Students will be assigned to a business site in Irvine:

Google

To register your students

Contact Neda Arab, Vital Link
neda@vitallinkoc.org || (949)646-2520

WHEN Wednesday
March 4, 2020

Lunch is provided. *
Bus and sub costs are not covered. *

WHAT is this event?

The Greater Irvine Chamber, Irvine Public Schools Foundation, United Way, and Vital Link have partnered to bring local Orange County schools a unique career exploration opportunity. One day out of the year, multiple Irvine businesses open their facilities for site tours to students as they explore meaningful careers in various life science, technology, and advanced manufacturing industries.

**Business/Marketing/Accounting
Regional Advisory Board
Advisers
Friday, November 15, 2019**

Trends Panel	
Nicole Cox (Accounting)	Ernst & Young
Paul Beakes (Business)	ERM Insurance Brokers
Jessica Martini (Business)	Southwest Airlines
Alvin Fong (Marketing)	CIE
Patti Larson (Marketing)	SunUp Group
Industry Panel	Business Management / Entrepreneurship
Richard Carroll	CoAdvantage
Rand Brenner	Licensing Consulting Group
Jessica Martini	Southwest Airlines
Paul Beakes	ERM Insurance Brokers
Paperwork Only	Business Management / Entrepreneurship
* Joshua Rosenthal	Insperity
Industry Panel	Marketing / E-Commerce
Steve Getman	Insignia Industries
Nina Steffen	NRS Marketing
Alvin Fong	CIE
Sanjay Dalal	oGoing
Paperwork Only	Marketing / E-Commerce
Patti Larson (Marketing)	SunUp Group
Industry Panel	Accounting / Finance
James Haynes	Haynes & Associates, CPA
Alexander Elliott	AW Elliott and Associates
John Dade	High Ridge Futures
Paperwork Only	Accounting / Finance
Nicole Cox (Accounting)	Ernst & Young
* Ursula Garrett	Garrett & Associates
PLC Speaker	
Rand Brenner	Licensing Consulting Group



Business/Marketing/Accounting

Regional Advisory Board

Friday, November 15, 2019

About our Advisers:

Our Business Management / Entrepreneurship Advisers

Jessica Martini, National Accounts Manager, Southwest Airlines

Jessica Martini is a New York transplant that has been in hospitality and travel for fifteen years. After working in sales for hotel brands like Hyatt and Hilton, she joined Visit Anaheim to focus on generating more meetings and conventions throughout Orange County. Currently she is a National Accounts Manager for Southwest Airlines, managing customer relationships for their top 50 accounts in San Diego and Las Vegas area. Jessica is a regular guest lecturer at CSUF Mihaylo College and Cal Poly Pomona Collins College of Hospitality Management. Additionally, she is a past board member of MPI Orange County Chapter and MPI Northern California Chapter, and current board member of San Diego's BTA Chapter. She is mother to several four-legged children and one two-legged child.

<https://www.southwest.com/>

Paul Beakes, Senior VP, ERM Insurance Brokers

I have approximately 25 years in the Financial Services Industry serving as a financial Advisor. After the great recession, I opened a Farmers Insurance Agency for about 4 years. I then decided I preferred Commercial Lines over personal Lines and obtained producer position with Excelsure Insurance Services in Huntington Beach. After approximately 1 year there, I was promoted to Sales Manager which lasted an additional 3 years. Today I am the Sales Manager at ERM Insurance Brokers in Santa Ana and have been here just over a year.

<https://www.erminsurance.com/>

Richard Carroll, Regional Sales Manager, CoAdvantage

Work Experience: I knew I wanted to go into sales and took a position out of college selling copiers. I received a great deal of formal training and gained valuable experience. After a couple years, I started a career in Transportation Sales. I received an opportunity to learn commercial fleet maintenance sales; starting with small business and working my way to national accounts and finally national account fleet auto and truck sales, then trained in operations and financial management, working my way up to VP of GE Capital Fleet Leasing within 10 years. I made a transition to Ryder Transportation Systems (commercial Heavy Duty Truck Leasing) for another 10 years.

I decided to change industries and found an opportunity selling enterprise level drug testing for LabCorp. This was not a traditional transition but opened up doors to a whole new world and helped me get to where I am today. I was next offered a position with a small background screening company and helped them to grow in both sales and operations. I spent 3 years in background screening helping two different companies before starting my own background screening firm which I sold to my partner.

I moved into my current field PEO (Professional Employer Organization) – We essentially put a Fortune 500 caliber HR Department in small and medium size businesses. I have been in this industry for more than 15 years and am currently a Regional Sales Manager for CoAdvantage. I love what I do and believe in the value of what we do for entrepreneurs; which is helping them achieve their goals.

<https://www.coadvantage.com/>



Rand Brenner, President and CEO, Licensing Consulting Group

Rand Brenner is an IP professional whose passion is helping inventors, startups, and businesses of all sizes use licensing to turn their IP into income-producing products, services, and technologies. His decades of experience run the gamut from medical devices to food technology to consumer products. He's licensed some of the biggest Hollywood entertainment blockbusters including the Batman Movies (1 and 2), and the number one kid's action TV show, the Mighty Morphin Power Rangers. Rand speaks about licensing and is a featured speaker at investment conferences, trade shows, colleges, and startup events. He's a published writer with articles appearing in several prestigious trade magazine including *The Licensing Journal*, *Intellectual Property Magazine*, and *License India*. Rand also mentors at the Cal State Fullerton School of Business and Economics and is a judge for their startup business plan competitions.

<https://licensingconsultinggroup.com/>

Our Marketing/E-Commerce Advisers

Steve Getman, Partner, Insignia Industries, LLC

Steve Getman is a partner in Insignia Industries, LLC, a marketing and branding agency founded in Orange County in 2019. Previously, he was a partner and Chief Technical Officer (CTO) of Flash Point Communications, LLC in Costa Mesa, CA. There, he led the web development, Quality Assurance, Media Buying, and Analytics teams. He brings over 20 years of digital marketing experience serving Fortune 50 companies in the Automotive space.

<https://www.insigniaindustries.com/>

Nina Steffen, President, NRS Marketing Solutions

Nina Steffen, founder of NRS Marketing Solutions, has nearly 20 years' experience planning, buying and negotiating local and national media for numerous clients. She specializes in helping businesses effectively use advertising to increase exposure, traffic, sales and their bottom line. Her expertise includes planning and executing traditional and digital media campaigns.

Agency Experience: Ocean Media, MEC, InnOcean, and Lopez Negrete

Client Experience: Priceline, eHarmony, The UPS Store, Yamaha, OCTA, etc..

<http://nrsmarketingsolutions.com/>

Patti Larson, Founder and CEO, SunUp Group

Patti is a thought leader in brand strategy and is the founder and CEO of SunUp Group, Inc., a business strategy, brand, and marketing agency in Orange County, California. Her wealth of experience includes over 25 years in accelerating bottom line profits through strategic growth plans, brand development, and innovative sales and marketing strategies. She has the life learning experience blend of being a corporate executive and entrepreneur.

SunUp Group supports professionals, businesses, and nonprofits with strategically positioning their brand for growth performance.

Patti is also passionate about Personal Branding for professionals helping leaders get out in front of their logos by differentiating themselves and monetizing their brands.

She is involved in many business and community initiatives, including Center Club Orange County, where she is the Center Club Cares Committee Chairman and the Center Club Vice-Chair for 2018-2019. She also serves on the Board of Directors for Courageous Voice, is Vice-Chair on the Advisory Committee for OneOC, Encore, and a mentor for the Center for Creative Leadership specializing in executive coaching.

<http://www.sunupgroup.com/>

Alvin Fong, COO, Cie

As COO at Cie, Alvin Fong brings exceptional leadership in strategic partnerships, cross-channel audience development, and monetization and optimization.

Alvin's expertise in enhancing organizational, operational, and financial efficiency has steered exponential growth and scale across several digital companies. This includes increasing StyleHaul's video views to more than 500 million per month, as well as launching and nurturing Internet Brands' Auto Enthusiast Division into a Top 10 comScore ranking and executing 44 acquisitions for the company.

<https://www.ciedigital.com/>

Sanjay Dalal, Founder and CEO, oGoing

Sanjay B Dalal is founder & CEO of oGoing, the leading B2B community that connects 100K local, small and growing businesses. A community volunteer, digital marketing consultant and quintessential entrepreneur, Sanjay lives with his family in beautiful Irvine, California.

<https://ogoinc.com/events/>

Our Accounting/Finance Advisers

Jim Haynes, President, Haynes & Associates, CPA

Jim began his accounting career in 1984 with a large local firm in San Diego after graduating college. He obtained his Certified Public Accountant designation in 1989 and earned his Master's Degree from the University of Southern California in 1990. He is a member of the California Society of CPAs. Jim spent ten years with public accounting firms in both the audit and tax departments. After leaving public accounting, he transitioned into private industry where he had great success as both a Controller and Chief Financial Officer. He has experience in many types of industries including real estate development and construction, low income housing tax credit properties, sub-contractors, and property management, just to name a few.

<https://haynesassociatescpa.com/>

Alexander Elliott, Certified Financial and Tax Advisor, AW Elliott & Associates

I am a certified financial and Tax Advisor my area of expertise is in tax planning, preparation & representation, retirement planning. I am a certified Medicare advisor in the Medicare Market from original Medicare, Medicare supplement plans and Medicare Advantage, Special Needs Plans for Chronic Needs & Conditions plans as a byproduct of my advisory business is life insurance, health insurance and annuities I am also a certified agent for Covered California

<https://awelliottassociates.com/>

Nicole Cox, Assurance Manager/CPA, Ernst & Young

Nicole is an Assurance Manager at Ernst & Young (EY) Los Angeles who serves clients in both the real estate and employee benefit plan (EBP) practices. She's been with the firm for over five years providing assurance services for home builders and Real Estate Investment Trusts (REITs). She has specialized knowledge of EBPs including defined contribution plans (primarily 401(K)), defined benefit plans, and health and welfare plans. Outside of her client serving responsibilities, Nicole also serves as the Project Manager of the Black Professional Network (BPN) at EY Los Angeles and a member of the West BPN where she is responsible for overseeing all events and projects within Greater Los Angeles.

https://www.ey.com/en_g

John Dade, Senior Managed Futures Associated Person, High Ridge Futures

John Dade is a Senior Managed Futures Professional with High Ridge Futures, LLC in Laguna Hills, CA. He is licensed through the Commodity Futures Trading Commission (CFTC) a Federal Regulatory Agency, and a member of the National Futures Association (NFA), a self-regulatory association authorized by Congress in 1982.

John Dade has been in the investment arena for over 20 years having joined High Ridge Futures, LLC September 2017.

Previously Mr. Dade was with Essex Asset Management from late 2010 until joining High Ridge Futures, LLC.

Prior to joining Essex Asset Management, Mr. Dade worked at Forex Global Trading in which he was the owner and principal from 2008 to 2010.

He is also a licensed Investment Advisor Representative. Mr. Dade is currently Series 3 & FINRA 65 licensed.

His hobbies include Range Shooting, Premium Cigars, Scotch Tasting and Classic Corvettes. He is married and has one son and two grandchildren.

<http://www.highridgefutures.com/>

www.vital-link.com

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CTEoc Leadership Committee

Kathy Johnson – VL
J. S. Coke – Co-Chair
Raquel Requena Ramirez – Co-Chair
Elizabeth Arteaga
Dorsie Brooks
Myra Clarke
Kenia Cueto
Marilyn Cunneen
Israel Dominguez
Dana Encheff
Tracy Foreman
Lisa Green
Raine Hambly
Kari Irwin
Jillian Johnson-Sharp
Nancy Jones
Merry Kim
Lisa Knuppel
Sara Kong
Megan Labare
Veronica Lew
Grant Litfin
Martha Payan-Hernandez
Scott Reindl
Raquel Requena-Ramirez
Kathleen Reiland
Alita Salazar
Lorraine Sanchez
Marianne Schaeffer
Kim Thomason
Debra Vanschoelandt
Michael Vossen
Paul Weir
Annie Younglove

School Districts

Anaheim Union
Brea Olinda
Fullerton Joint Union
Garden Grove
Huntington Beach Union
Irvine
Laguna Beach
Los Alamitos
Newport-Mesa
Orange
OC Dept. of Education
Placentia-Yorba Linda
Saddleback Valley
Santa Ana
Tustin

Regional Occupational Programs

OC CTEp
Coastline
North Orange County

Community Colleges

Coastline
Cypress
Fullerton
Golden West
Irvine Valley
NOCE
Orange Coast
Saddleback
Santa Ana
Santiago Canyon

A Program of:

Vital Link Orange County



Business, Accounting, and Marketing Regional Advisory Board

Friday, November 15, 2019

Cisco Systems

130 Theory, Suite 100, First Floor

Irvine, CA 92617

Accounting, Business, and Marketing Positions: Trends and Statistics

Following the Advisory Board Meeting, you will be e-mailed the pdf documents for the following URLs and corresponding Entry-Level Positions and Statistics. Please be sure that your e-mail address is correct on the Sign-in Sheet as you sign out from today's meeting. But in the meantime, please feel free to go to the URL and read the latest data.

Accounting:

Bookkeeping, Accounting, and Auditing Clerks/Financial Analysts/Auditors

- **Bookkeeping, Accounting, and Auditing Clerk**
 - <https://www.onetonline.org/link/summary/43-3031.00>
 - <https://www.bls.gov/ooh/Office-and-Administrative-Support/Bookkeeping-accounting-and-auditing-clerks.htm>
- **Financial Analyst**
 - <https://www.onetonline.org/link/summary/13-2051.00>
 - <https://www.bls.gov/ooh/business-and-financial/financial-analysts.htm>
- **Auditors**
 - <https://www.onetonline.org/link/summary/13-2011.02>
 - <https://www.bls.gov/oes/2017/may/oes132011.htm>



Accounting, Business, and Marketing Positions: Trends and Statistics

Business:

Management Analysts/Online Merchant/Project Coordinator/Public Relations Specialist/Training and Development Specialists

- **Management Analysts**
 - <https://www.onetonline.org/link/summary/13-1111.00>
 - <https://www.bls.gov/ooh/business-and-financial/management-analysts.htm>

- **Online Merchant (Retail Sales Workers/E-Commerce)**
 - <https://www.onetonline.org/link/summary/13-1199.06>
 - <https://www.bls.gov/ooh/sales/retail-sales-workers.htm>

- **Project Coordinator (Event Planner)**
 - <https://www.onetonline.org/link/summary/13-1121.00>
 - <https://www.bls.gov/ooh/business-and-financial/meeting-convention-and-event-planners.htm>

- **Public Relations Specialist (Social Media)**
 - <https://www.onetonline.org/link/summary/27-3031.00>
 - <https://www.bls.gov/ooh/media-and-communication/public-relations-specialists.htm>

- **Training and Development Specialists**
 - <https://www.onetonline.org/link/summary/13-1151.00>
 - <https://www.bls.gov/ooh/business-and-financial/training-and-development-specialists.htm>

Accounting, Business, and Marketing Positions:
Trends and Statistics

Marketing:

Market Research Analysts/Marketing Sales Representative/Marketing Managers/Advertising and Promotions Managers

- **Market Research Analysts**
 - <https://www.onetonline.org/link/summary/13-1161.00>
 - <https://www.bls.gov/ooh/business-and-financial/market-research-analysts.htm>

- **Marketing Sales Representative**
 - <https://www.onetonline.org/link/summary/11-2021.00>
 - <https://www.bls.gov/ooh/management/advertising-promotions-and-marketing-managers.htm>

- **Marketing Managers**
 - <https://www.onetonline.org/link/summary/11-2021.00>
 - <https://www.bls.gov/oes/2018/may/oes112021.htm>

- **Advertising and Promotions Managers**
 - <https://www.onetonline.org/link/summary/11-2011.00>
 - <https://www.bls.gov/oes/2018/may/oes112011.htm>

CCC-OC Business and Entrepreneurship

WORKFORCE DEVELOPMENT

EMPLOYABILITY

ACADEMIC PREPARATION

COMMUNITY BUILDING



California Community Colleges



CTEoc, Business, Accounting Marketing Advisory Board
DR. CATHLEEN GREINER | REGIONAL DIRECTOR
BUSINESS AND ENTREPRENEURSHIP
ORANGE COUNTY
November 2019

What we will cover this session

- Overview of CCC Doing What Matters for Jobs and the Economy
 - Regional Directors and Statewide Directors...what the heck does that mean?
-
- Business and Entrepreneurship in the OC
 - Heard about the K12 SWP?
 - Info and Data
 - Preparing (now) for the Gig | Disruptive Economy
 - Critical data sources for your planning and knowledge
- And, what I can partner, consult, collaborate with you on and support over the next few years.

DSN'S: Colleague, Connector, Facilitator, Resource

- > Connection between business/employers and education, CCs, K12, University
- > Focus on Enrollment
- > Labor Market Information
- > Network and Networking
- > Skill and Upskilling
- > Employer and Emerging Industry Partnerships
 - Internships, Clinical Experiences, etc.

- > Market and Technology trends**
 - > Aligning Curriculum Efforts across the region**
-
- > Links to community partners, associations, agencies and major employers**
 - > Connections to the community college programs and how to 'dock' into the new/emerging guided pathways**
 - > Data, Information, Analysis**

EXAMPLES

➤ BUS + ENT

- SUMMER WORKSHOPS CROSS SECTOR AND POPULATIONS: CYBER, VETERANS, WOMEN RETURNING TO WORKFORCE, July 29-August 16, 2019
- INFO <https://www.mckinsey.com/featured-insights/future-of-work/the-future-of-work-in-america-people-and-places-today-and-tomorrow> July 2019 The future of work in America: People and places, today and tomorrow

➤ AUTOMOTIVE

- Mobilize California: Driving Change, August

➤ HEALTH

➤ TRANSPORTATION

➤ CULINARY (RETAIL, HOSPITALITY, MNGT.)

➤ ENERGY



YES..PRINTED OUT! At-A-Glance Table | Centers of Excellence, OC

DRAFT Sector	Annual Openings	Below Middle Skill	Middle Skill	Above Middle Skill	Orange County Annual Openings for Middle Skill Jobs (2017-20)	OC Entry-Level Wages	OC Median Wages	Orange County FTE (2017-18)	Orange Awards (2017-18)
Business and Entrepreneurship	49,630	7,240	30,990	11,400	30,990	\$16.50	\$28.70	8,575	4,561
Retail, Hospitality and Tourism	23,050	2,910	16,620	3,320	16,620	\$16.30	\$28.90	544	34
Health	14,940	330	13,890	720	13,890	\$16.50	\$25.60	5,83	1,746
Information and Communication Technologies (ICT) - Digital Media	19,220	3,900	10,480	4,840	10,480	\$19.00	\$31.20		1,92
Energy, Construction and Utilities	10,520	2,460	8,070		8,070	\$15.30	\$27.20	2,052	60
Advanced Manufacturing	7,900	550	6,980	370	6,980	\$14.50	\$22.40	400	524
Advanced Transportation and Logistics	8,040	2,310	5,700	30	5,700	\$14.70	\$23.00	340	1,833
Global Trade	7,520		4,160	3,360	3,360	\$20.20	\$41.00		85
Education and Human Development	6,220		5,210	1,010	1,250	\$11.80	\$17.40	2,213	98
None	3,100		2,580	520	500	\$15.20	\$23.40		33
Agriculture, Water and Environmental Technologies	2,410	80	1,940	380	600	\$18.60	\$26.40		85
Life Sciences - Biotechnology	1,750		1,660	100	30	\$14.20	\$26.80		3
Public Safety	930	50	790	80		\$27.90	\$39.90	3,517	6,254

Source: EMSI Data Set 2018.4 (Full date: 11/19/18) and Chancellor's Office Data Mart

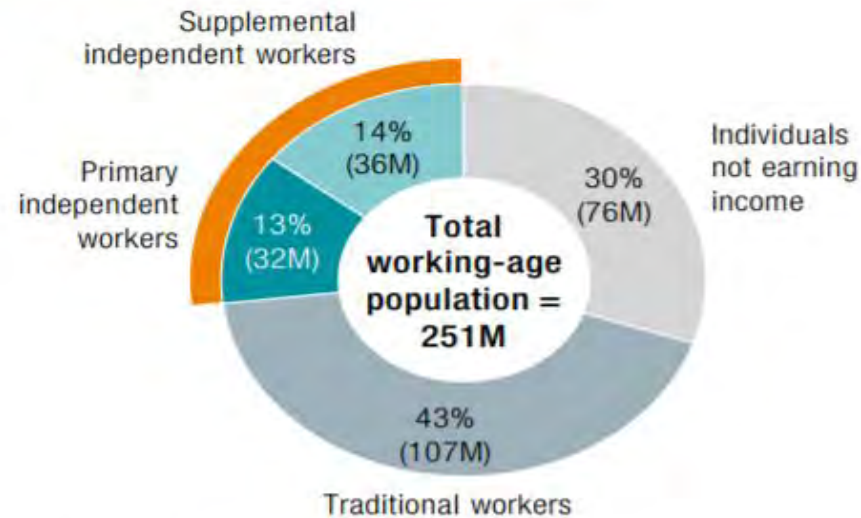
Changing Dynamics in the Workplace and Workforce

MGI's survey shows that the independent workforce is larger than government statistics indicate

% of total working-age population; million

68 million

people engaged in independent work²



Size of non-earning population is lower than government statistics as the data above capture

- One year of income history
- Many sources of income that may be in informal economy





FREELANCING IN AMERICA

2018

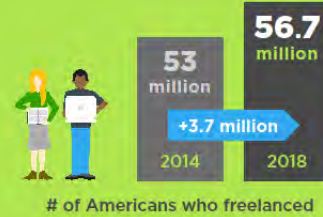
This study, conducted by an independent research firm and commissioned in partnership by Upwork and Freelancers Union, surveyed more than 6,000 U.S. workers. In its fifth year, findings show Americans are spending more than 1 billion hours per week freelancing.

Beyond quantifying the amount of freelancing happening, new insights delve into why people are increasingly choosing to work this way.



UPWORK.COM//FREELANCING-IN-AMERICA

56.7 million Americans freelanced this year



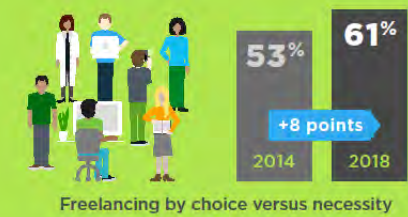
of Americans who freelanced

Americans are spending more time freelancing



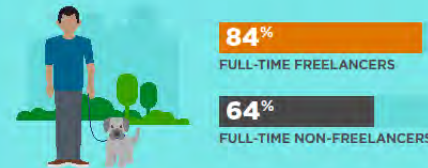
Hours spent on freelance work per week

More people are choosing to freelance



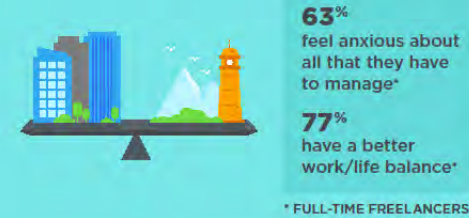
Freelancing by choice versus necessity

Nearly everyone prioritizes lifestyle over earnings



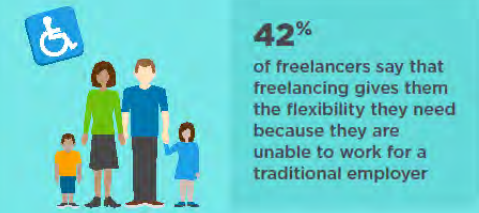
Percent who get their preferred lifestyle

Freelance lifestyles bring some anxiety but better balance

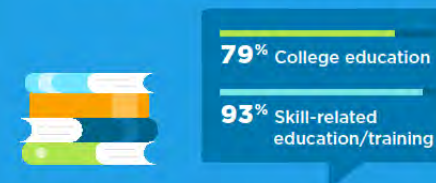


* FULL-TIME FREELANCERS

Freelancing provides more opportunities

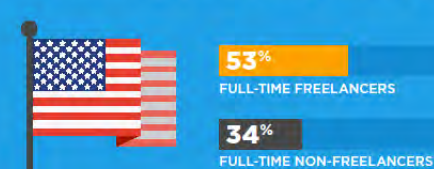


Freelancers value skills training over a formal education



Type of education more useful to the work freelancers with at least a 4-year college degree do now

Freelancers are more politically active



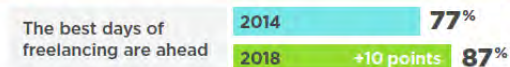
Participation in political activities

Tech is enabling freelancing



Freelancers who found work online

Freelancers are becoming more optimistic about freelancing's future

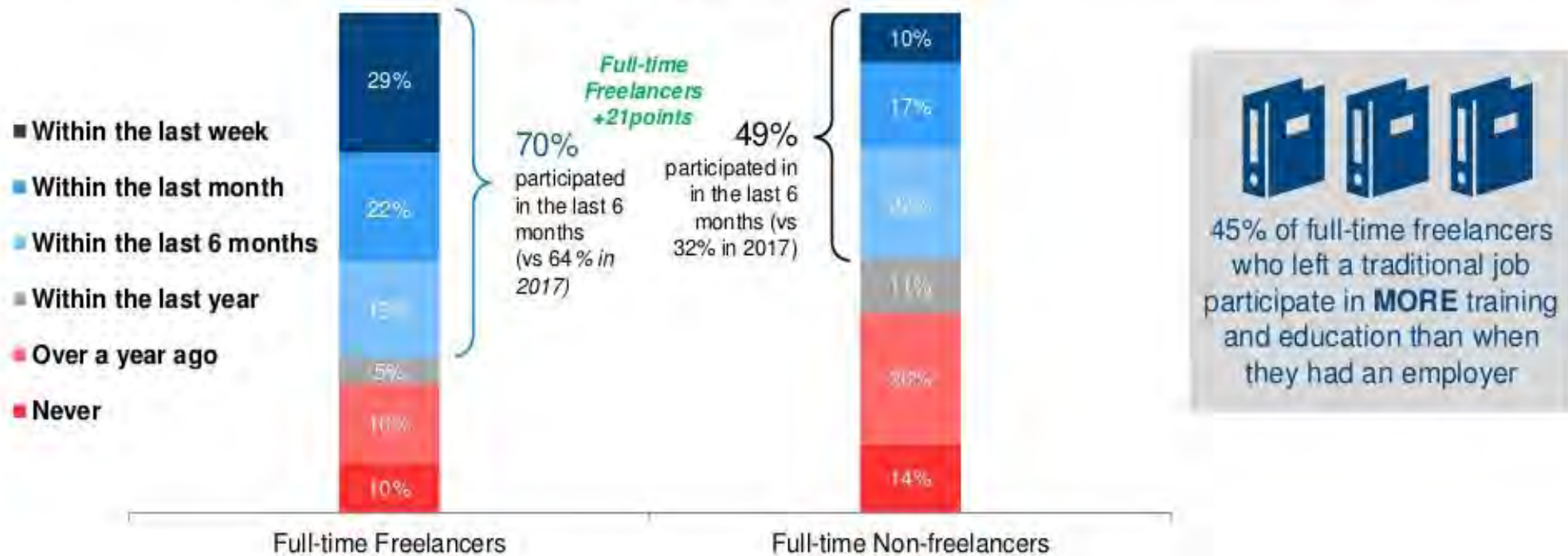




7 in 10 full-time freelancers updated their skills in the last six months, far exceeding full-time employees

When was the last time you participated in any skill-related education or training?

[Full-time freelancers and non-freelancers]



EDELMAN INTELLIGENCE / © 2018

Q21_3: When was the last time you participated in any skill-related education or training? Q29e: Compared to when you previously worked for an employer, how often do you currently partake in skill-related education or training?
Options: I participate in [more, same amount, less] education or training than when I had an employer



Big changes...actually here now

60% of job growth by 2030 could be concentrated in 25 cities/peripheries

Workforce displacement between 2017-30:

- 14.7 M Workers 18-34
- 11.5 M Workers over 50
- 4x higher displacement risk for workers with HS diploma or less

Within 60% of jobs, at least 30% of activities could be automated...ongoing, accelerated, change in how work is organized

Examples: Port of LA; Dept. of Energy SoCal



California is now the world's fifth-largest economy, surpassing United Kingdom

The data demonstrate the sheer immensity of California's economy

California's strong economic performance relative to other industrialized economies is driven by worker productivity*

California's gross domestic product rose by \$127 billion from 2016 to 2017, surpassing \$2.7 trillion.	California's economic output is now surpassed only by the total GDP of the United States, China, Japan and Germany.
5	1,2,3,4
* 40M people	UK 65M people

THE BIG THREE (for now)

SHARING | INDEPENDENT | PLATFORM ECONOMY: companies such as Uber, Lyft, and Airbnb are disrupting more and more industries by undermining once dominant business models, AKA “Gig Economy”

New World of Work: example = brick-and-mortar retail continues to lose market share to e-commerce. New skills = New ways of working in “traditional” workspaces

AUTOMATION: economists at Oxford University and McKinsey estimate that more than 45 percent of current jobs have the potential to be automated in the next two decades due to computers, robots, artificial intelligence, and other emerging technologies. Some metro are at risk of seeing 60 percent of existing occupations being automated by 2035

Employability Skills: Focus on Actions that are Meaningful and Effective (NWoW, CCCCCO)



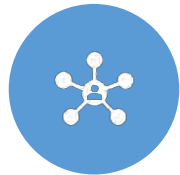
*ADAPTABILITY



*ANALYSIS/SOLUTIONS
MINDSET



*COMMUNICATIONS



*COLLABORATION



*ENTREPRENEURIAL
MINDSET



DIGITAL FLUENCY



RESILIENCE



SELF-AWARENESS

Interesting...Impacts us at CC's

- California needs 1 million more AA, certificates, or industry-valued credentials.
- California's Job Openings by Education Level 2015-2025 = 1.9 million job openings that will require some college or an Associate's degree





Questions?



Thank You !

BUSINESS AND
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CALIFORNIA COMMUNITY
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WORKFORCE AND ECONOMIC
DEVELOPMENT



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