

Financial Services Update

A quarterly publication with updates on the activities of the Financial Services Cluster in Pittsburgh and Southwestern Pennsylvania

May 2005

The Financial Services Workforce Initiative (FSWI) is focused on retaining talent in our industry and within the southwestern Pennsylvania region. Our current initiatives enhance skills and competencies to meet the industry customer service needs, establish a pipeline of talent with high school and post secondary students and build career awareness about the vast opportunities available in financial services. Through the efforts of the FSWI and the FSWI Advisory Board, we are building a better workforce to meet the demands of the financial services industry.

Project Highlight...Financial Services Vacancy Survey

In early February, a job vacancy survey was distributed to regional financial services organizations. The purpose of the survey was to gather industry information about 2005 projected openings and job vacancies. Pinar Geylani, Ph.D., Center for Competitive Workforce Development and Tom Collins, World Class Industrial Network, are gathering data from paper and telephone surveys. This data will be analyzed and compiled into a report, which will be shared in the August Financial Services Update.

Congratulations to Carrie Riggle, First Commonwealth Financial Corporation. Carrie was the winner of a random drawing of surveys completed by February 18th. She received \$100 in Barnes & Noble Gift Cards, which she shared with fellow First Commonwealth staff members.

Major Initiatives...Update

High School Program/Pittsburgh Regional Internship Collaborative Enterprise (PRICE)

The PRICE High School Program Speakers Bureau concluded in May 2005. The Speakers Bureau provided an opportunity for interested students to relate to a professional in his/her career. By providing students with a realistic picture of what is involved in a particular career field, the path of entry into the field, and the necessary education, the students were better able to set goals for themselves. They also were able to gain a clearer understanding of the skills taught in school and how those skills are applied to the workplace. We would like to thank all those community business men and women who volunteered their time to participate in this valuable initiative at the Business & Finance Academy, Westinghouse High School, Pittsburgh Public Schools.

Thank You...

January 2005

Career Speaker	Grade and Topic	
Carena Pope, Career & Workforce Development Center	9 th Grade	Getting Along w/ Others (Attitude)
Inez Miles, Citizens Bank	10 th Grade	Business Etiquette
Orlana Darkins, Darkins Communications	11 th Grade	Positive Thinking
Doris Carson Williams, (African American Chamber of Commerce)	12 th Grade	Characteristics of an Entrepreneur

February 2005

Career Speaker	Grade and Topic	
Larry Pickett, Highmark	9 th Grade	What to Expect on the Job
Irvin Williams, Ebony Construction	12 th Grade	Cost of Starting & Operating a Small Business

March 2005

Career Speaker	Grade and Topic	
Valerie Harper, Duquesne Career Services	9 th Grade	Filling out Job Applications
Richard Witherspoon, Treasurer, Hill District Credit Union	10 th Grade	Payroll Forms (W4/Pay Stub/Taxes)
Harry Ford, Regional Development Funding Corp	11 th Grade	Global Economy
Kelly Russell, Three Rivers Workforce Investment Board	12 th Grade	Cost/Benefit Analysis (Life Planning Exercise)

May 2005

Career Speaker	Grade and Topic	
Dan Horgan, Three Rivers Workforce Investment Board	9 th Grade	Interview Horror Stories, Do's & Don'ts When Interviewing
Roy Banner, Neighborhood Housing Services	10 th Grade	Responsible Buying/Managing Money
Roderick Craighead, Highmark	11 th Grade	Cultural Differences (Diversity in the Workplace)
Evan Frazier, Hill House Association	12 th Grade	Ways to Market Your Skills

The career speakers are people who volunteer his/her time to make a career-related presentation at Westinghouse Business & Finance Academy. Typically, a career speaker speaks to approximately 10-25 students about a specific career topic for a classroom period (approximately 40 minutes) during a regular school day. Students provide feedback on the presenters. **If you would be interested in participating in the Speakers Bureau for 2006, please contact Melissa Price, PRICE Program Coordinator, 412-396-1401 or pricem@duq.edu.**

As the summer approaches, we are working with PRICE High School Program participating employers (Highmark, Mellon Financial and the Finance Department/PPS) and the administration and faculty of the Business & Finance Academy to place qualified high school juniors and seniors in a six week summer internship opportunity. The purpose of the internship is to provide students with an opportunity to gain experience and exposure to the corporate environment. During this internship experience, the students will work to develop skill based goals and objectives, engage in networking events and gain exposure to various career opportunities.

Customer Service Supply Chain

Volunteers from National City, UPMC and West Penn Allegheny Health System participated in a mock interview workshop on April 12th with the CSSC students. The purpose of the mock interviews was to prepare the students for the Career Fair and future job interviews.

On Wednesday, April 20th, Citizens Bank hosted a Career Fair for thirteen CSSC program graduates. Career Fair participating employers were: AllStaff; Automated Health Systems; Citizens Bank; Dollar Bank; Dollar Energy Fund; First National Bank; Gregg Staffing Services; Highmark; National City Bank; UPMC Health Plan; UPMC WFD; UPMC Primary Care Network and Venturi Staffing Partners.

The current CSSC training class began on April 26th and will conclude June 18th. The CSSC Career Fair will be hosted by Comcast on Wednesday, June 22nd. If you would like further information about CSSC classes or would like to become a participating employer, please contact Bill Freed, Freedlance Group at 412-429-7650, Ext. 27 or visit www.careerwired.com/customerservice.

Pittsburgh Regional Internship Collaborative Enterprise (PRICE)/Post Secondary

Recruiting for PRICE participating employers and students is just about complete. Orientations are being conducted throughout May with employers and internship managers and mentors. The PRICE Intern Orientation is scheduled for June 8 and June 15. As of late April, PRICE Post Secondary Program participating employers include National City Bank, First National Bank, Mellon Financial, First Commonwealth, Citizens Bank, AXA Advisors and Heffren-Tillotson. We are anticipating adding up to five more employers to this participation list.

Many aspects of the 2005 Post Secondary Program are in process. The Career Development workshops series will kick off with a Career Development Breakfast scheduled for June 17th. The focus of this breakfast will be a discussion about how to develop a career portfolio. The PRICE Partners Networking & Activities and Community Outreach committees are pulling together final details for the summer events. We are collaborating with the RIC to coordinate activities. The PRICE Recognition Event is also in planning and scheduled for August 11th. We are pleased to announce that Bill Flanagan, Pittsburgh Regional Alliance, has agreed to be the Master of Ceremonies for the event. THANK YOU Bill!!!

The 2006 PRICE Post Secondary Program is shaping up! We look forward to engaging the PRICE interns in the industry and the region.

FSC Advisory Board Member Profile

Members of the Financial Services Cluster Advisory Board are representative of the many different aspects of the industry. Each member was selected because of the individuals they are, the values they demonstrate and their ability to look at financial services as an industry as a whole. Each quarter, we would like to highlight a member of the Financial Services Advisory Board and present their thoughts on the advisory board, the cluster and the industry.

Natalie Smetanka

Senior Recruiter

Citizens Bank

Background Information

Education Bachelor's Degree- Robert Morris University- Human Resource Management
Master's Degree- LaRoche College- Human Resource Management

Experience Natalie has six years experience as a recruiter for Citizens Bank and Mellon combined. She has recruiting experience in all areas of Banking.

Current Position: Senior Recruiter

Financial Services Organization: As of the Charter One Financial acquisition on August 31, 2004, Citizens Financial Group, Inc. is a \$131 billion commercial bank holding company. It is headquartered in Providence, R.I., and has more than 1,530 offices, approximately 2,700 ATMs and approximately 24,000 employees in 13 states. It operates in Connecticut, Delaware, Illinois, Indiana, Massachusetts, Michigan, New Hampshire, New Jersey, New York, Ohio, Pennsylvania, Rhode Island and Vermont. Citizens is the 12th largest commercial banking company in the United States in asset size and ninth when ranked by deposits. Citizens is owned by The Royal Bank of Scotland Group plc. The Citizens Web site is www.citizensbank.com

Questions & Answers

- **What are your expectations of the FSC Advisory Board?**

To bring the leadership of the various financial industry companies together to become the industry of choice for employment.

- **What is one objective that you would like the Financial Services Cluster (FSC) to accomplish?**

To work collectively to make the Financial Services Industry the most desirable industry to work in Pittsburgh.

- **What do you see as the major challenge for the financial services industry currently and within the next 3-5 years?**

Currently, I believe the greatest challenge for the financial services industry is attracting and retaining senior level individuals in the Pittsburgh market. Pittsburgh is a relatively small market and there are limited individuals that have the skill set that qualify for senior level positions.

- **What skills/competencies do you think will be the most critical for financial services employees in the next 3-5 years?**

With the increased competitiveness of the large financial institutions, sales and leadership are two of the competencies that will be essential to progress within the financial sector.

- **What advice do you have for individuals considering a career in the financial services industry?**

The advice I would give to an individual considering a career would be to learn about as many areas of the financial services sector as possible. There are a lot of great career path opportunities that can be pursued but you will need to start in an entry level position and move up from within.

On the Agenda....

- Meeting with Ron Painter and Greg Greenleaf, of the Three Rivers Workforce Investment Board, to explore opportunities for collaboration.
- Creating a Financial Services Workforce Initiative home page, with a link to a PRICE web site.
- Continuing the development of a Redeployment Strategy for financial services.

If you would like to find out more about the activities of the Financial Services Cluster or have questions and comments, please contact:

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