

Module Three: Building a Stronger Regional Team

This instructor's guide outlines the content, worksheets, activities, and scenario that should be used to teach this section. Refer to this document for additional comments about each module as well as the overall objectives.

Using a Scenario

A scenario is utilized in this training for two reasons. First, it challenges participants with actual situations that they may encounter. This allows them to be exposed to these issues in a low stress type of environment. Second, with a scenario, we can inject key concepts and leadership dilemmas.

The trick to an effective scenario session is being a good story teller. Your job as the instructor is to immerse the participants into each situation. The situations we present are purposefully ambiguous. You can, however, add additional details if you feel it can add an interesting twist to the story.

As the trainer, keep the following in mind:

- Don't respond to pleas by the group to clarify the scenario
- Do let the participants struggle with the scenario (that's the point)
- Do encourage the participants to fill in the details from their life experience

Using the Workbook

The participant workbook contains worksheets designed to assist participants in planning their economic development effort. Much of the information from the slides relates directly to the workbook, so make sure to study it and refer to it along the way.

References

Council on Competitiveness (2010). "The seven habits of highly effective regional leadership." Chapter 5 in *Collaborate: Leading Regional Innovation Clusters*.

Dabson, Brian (2006). "Eight principles for effective rural governance and how communities put them into practice." RUPRI (July): www.rupri.org/Forms/RGireport.pdf

Slide: 1

Time: Use at start as background



Instructions:

Module Three is intended to offer the participants an opportunity to work on building a strong regional team. It's important to note that in many cases, the group meeting as part of this SET training will already have a regional team in place. Even if that is the case, this module can help them determine if their team has the right mix of people with the right set of skills and perspectives. If they conclude that their team needs to be expanded, then this is the right time to do so before they get involved in formulating an economic development plan for the region.

Script:

Our discussion today will center on the formation or enhancement of the regional team that will play a central role in the development and implementation of a strong economic development plan for your region. Even if you are part of a team that has been working together for some time, I believe the information in this module that will provide you with some important food for thought – ideas and strategies that can help make your efforts even more successful in the region.

Slide: 2

Time: 10 Minutes

Activity: Discussion

Reflecting on the Previous Session

- What was most useful from the previous session?
- What progress have you made since the previous session?
- Any comments or questions about the previous session?



Activity:

Participants discuss the three questions displayed on the slide either in small groups or as an entire group.

Instructions:

Have participants discuss the three questions displayed on the slide either in small groups or as an entire group. Take some time to make sure the participants recall the key points from the last session. This is an important activity because it gives each participant an opportunity to clarify anything that didn't make sense. You can facilitate this discussion in whatever way seems most appropriate for the group.

Script:

"Before we really get started talking about the content of Module Three, it's important that we take a few minutes to reflect on what we learned, what we did, and anything that wasn't clear from our last session.

[At this point, ask individuals to share what they found most useful, activities they undertook since the last meeting that is relevant to the SET initiative, and anything they feel needs to be clarified. Go around the meeting room to ask the participants to respond to these questions].

As each of us introduces ourselves again, please share your thoughts on one or more of these questions on the slide."

Slide: 3

Time: 4 Minutes

Activity: Instructor reads the script



Instructions:

This is your opportunity to become a story teller. Read the script below, but feel free to add details to make things more interesting. It's important to bring people into this fictional situation and get them to recognize that this situation can really happen. Take it slow and make it interesting.

Script:

“The Horseshoe River Collaborative was formed one year ago to promote regional economic development in the communities along the Horseshoe River. The group included a small group of regional leaders that had experience working together. Since, the group has worked together, they were able to easily get a few projects started. Their initial efforts led to some amazing results. In just one year, the group facilitated the work of its member organizations and received two federal grants. One grant was designed to help clean up a four-mile stretch of the river and another to build a business incubation park in Horseshoe City, the largest city along the river. The river has a history of being a fantastic tourist destination, but in recent years, it has become polluted.

In recent months, the group has lost its momentum, leading to inertia. The primary leader of the group was a CEO of a large company. That leader took a new position and has left the region, leaving the others in the group to fill the void. The group has been good at managing building projects, but has done a poor job of thinking broadly about the other issues related to their efforts. There is still a great deal of work to be done, but many of the original collaborative members have accomplished their initial goals. Meeting attendance has declined significantly. A few members of the group continue to meet, but their frustration level is on the rise. At their most recent meeting, one group member asked, “Why are we just meeting to meet?”

In addition to the inertia, the collaborative has been the subject of controversy in the community. Several groups have questioned the priorities of the Horseshoe River Collaborative. One organization that represents the northern portion of the river has publicly raised its objections to the Collaborative's past efforts. They would like to see development distributed more evenly across a larger pool of communities, not just the largest city. The group also would like to have a business park developed in the northern part of the region.

Another group has questioned why other aspects of the river haven't been given any attention. That group, called "Friends of the River," represents hotel and recreation businesses in the southern portion of the river. They are upset that they haven't been consulted at all or been invited to play a role in the collaborative.

There is also a group that believes more should be done to support entrepreneurship in the region, but believes this group has only focused on supporting the powerful existing businesses.

All of these groups, as well as others, are confused about what participating in this effort involves.

With these complaints surfacing, the collaborative realizes that it needs to make changes if it hopes to fully accomplish the long term meaningful changes they had hoped to achieve in the region."

Slide: 4

Time: 2 Minutes

Activity: Instructor reads the bullet points

Building a Strong Regional Team



- Big initial success
- Small, but powerful group
- Attendance is dropping
- Key leaders are leaving
- Controversy over priorities, and membership



Instructions:

Use this slide to highlight the most important aspects of the story you just told. This should only be used as a quick summary. Don't spend too much time here.

Script:

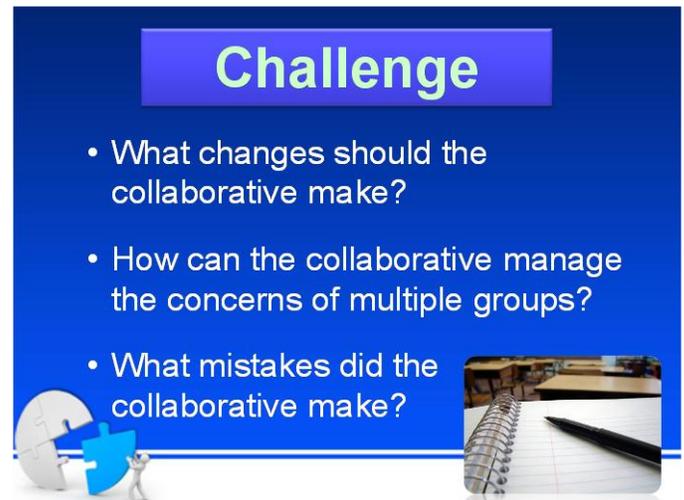
"Here is a quick summary of the most important points from the story I just share with you. These will be important in just a minute when I ask you to complete a short challenge." [At this point, briefly highlight what is on the slide].

Slide: 5

Time: 15 Minutes

Activity: Discuss with group

Workbook: Worksheet 1



Challenge

- What changes should the collaborative make?
- How can the collaborative manage the concerns of multiple groups?
- What mistakes did the collaborative make?



Activity:

Participants complete the challenge in small groups. Write comments on a flip chart.

Instructions:

The purpose of this exercise is to help participants think practically, purposely, and strategically about how to ensure that their group is successful. This will require the group leaders to plan for the good times . . . as well as for those times when things are not going so great.

Using the text from this slide, explain to the participants their challenge. It's important to offer a very limited amount of assistance or to offer very few additional details. If pressed for additional information, encourage the participants to use their own experiences to fill in the missing details. Have the participants use the workbook page listed below to complete the activity. Give participants a few minutes to think and write their answers. After a few minutes, start to encourage people to discuss the challenge with each other.

Urge the participants to be specific. They should try to put themselves in the shoes of someone that would be on the leadership team for this collaborative. Most likely, they will have experienced a situation where the group did not accomplish what it had intended to. You want to draw on that experience because it will be valuable for everyone.

Ask for participants to share the highlights of their discussion. Keep track of the comments by writing them on a flip chart.

Script:

"I just outlined a scenario that often happens in economic development. I'm sure you have seen something like this in your own work or that of other local leaders. If not, I'm pretty sure you will someday. Let's take a few minutes to delve deeper into this scenario. To do so, I'd like to ask you to

use your workbook and find the page that is titled “Scenario: Building a Strong Regional Team. Think about how you would accomplish each of the tasks listed. When you have written a few answers for each task, turn to a neighbor and discuss what you each wrote. You’ll have about 15 minutes to complete this activity.”

Slide: 6

Time: 7 Minutes

Activity: Discuss with entire group



Instructions:

Take a few minutes to review the challenge with participants. Encourage them to share what was frustrating about this activity. Pay special attention to any comments they offer in terms of how they solved similar situations in their lives. Limit the discussion. Participants may have a tendency to spend too much time sharing their stories. Be sure to invite only a few people to discuss their reactions to the story, and then move on.

Script:

“I hope you found the scenario to be challenging. I think it reflects the way things often happen when we start big projects in a region or communities. I’m interested in hearing how you handled each of these tasks. Let’s start with the first one.

Who’s willing to share their thoughts and ideas about the first question?[Take one story]

How about the second question? What did you decide?...[Take one story]

And the third issue we asked you to address?.....[Take one story]

Thanks for sharing all of those great solutions to this challenge. They are really helpful. We should keep these in mind as we continue our discussions today. Some of you may suggest that there’s no easy way to organize an effective leadership team. No need to worry. We’re going to start talking about some suggestions on how you might tackle this important issue.”

Slide: 7

Time: 3 Minutes

Activity: Instructor reads outline

In This Session We Will:

- Determine Elements of a Sound Team
- Develop a Call to Action
- Invite Broad Participation
- Create a Succession Plan
- Explore Habits of Highly Effective Regional Leadership



Instructions:

Read through the outline of Module Three.

Script:

“The remainder of our time together today is going to be devoted to exploring ways to keep the ‘people’ element of regional economic development sustainable. Much of this work involves you, the leaders of this SET regional team, being prepared for the up’s and downs that you are likely to experience whenever you try organizing people and groups that may have competing interests. We’ll define each of the bullet points outlined in this slide. Hopefully, you’ll have an appreciation of why thinking through these items can be valuable to your team.

The bottom line is that we want to find things that might work in your region, test them out, and implement what works best. You’ll likely have many more ideas related to this discussion, so please feel free to add to the conversation at any time.”

Slide: 8

Time: 2 Minutes

Activity: Read script

A Strong Regional Team

- Prepares to overcome obstacles
- Assesses who else needs to be involved
- Brings more people to the cause
- Makes sure things happen
- Advocates



Instructions:

Note the key attributes of a strong regional team.

Script:

“Your job as a member of this regional team is quite important. This slide outlines some of the important attributes of a strong regional team. [Read each of the bullets].

Your group will likely start out with an initial surge in energy, but it’s up to you to work to sustain that energy. Many of the things we’ll talk about today are designed to help prepare you for what’s upcoming in other SET modules. Let’s start our preparation by thinking about the obstacles that may lie ahead for your team.”

Slide: 9

Time: 7 Minutes

Activity: Group activity

Workbook: Worksheet 2

Green Light / Red Light



- Organizations to which you currently belong



- Organizations of which you once were a member



Activity:

The group will consider the bullet points on the slide and then jot down their thoughts as to why they joined and left groups.

Instructions:

It's important for your participants to know why people are inspired enough with an organization and its projects to want to join and lend their skills, energy and time. As most of your participants will indicate, they have been inspired to be a part of a group and then, on occasion, have lost some steam -- sometimes to the point where they opt to quit the organization. We want to consider elements that encourage people to join groups and the factors that cause them to leave groups. This slide and the next, along with Worksheet 2, will help the participants think about the good and the bad aspects of being part of a group, and how to incorporate and build on the good features of a group while avoiding pitfalls that can discourage sustained involvement in the efforts of the group.

Script:

"No doubt all of you have been a member of several organizations/groups over the years. What we want to ask you to think about in this slide and the next is two things: (1) what was it about these groups that made you want to join them; and (2) what made you decide to leave these groups (assuming that you did leave one or more of these organizations)?"

As you can imagine, it's good to have both of those in mind as you think about ways to make your regional organization successful, both now and in the future.

On Worksheet 2, you will see that we ask you to list two organizations to which you currently belong and to note why you decided to give that group your time, expertise and energy. You can include all types of groups: professional, non-profit, social, religious, formal, informal, etc. Any kind of group/organization will work. Don't spend a lot of time on it, just quickly jot down your first thoughts as to why you joined, but at the same time, try to be as specific as possible.

Then, on the flip side of things, list the organizations to which you once belonged and state why you opted to leave these groups. It can be an organization you left recently, or ones you stopped being part of some time ago. Again, move quickly. Just write down your first thoughts. Try to be as specific as possible.

In about 5 minutes or so, we're going to invite some of you to share your responses to these questions and then we'll see how we can use these important insights to make your regional team even stronger.

[Move to the next slide when it is time to ask for feedback from the group about these issues].

Slide: 10

Time: 8 Minutes

Activity: Group discussion

Workbook: Worksheet 2



Why I Joined and Why I Left

What Can We Learn about:

- Reasons people join partnerships
- Reasons they leave
- How to foster growth and commitment
- Ways to lessen drop-out

How can we apply these lessons to our partnership?

Activity:

After the participants have answered the questions on Worksheet 2, lead a short discussion as to why people join and leave organizations/groups.

Instructions:

Have about a 3 or 4 minute discussion on why people join, why they leave and how the group can use these thoughts to take action along the way to avoid dropouts. Ask four or five people to quickly give their reasons. (Ask them to avoid repeating a point that's been offered already). Then, have a 3 minute discussion on what the group thinks is important to carry forward into the on-going evolution of the SET initiative. Ask them how they would incorporate these into their efforts to keep their team active and vibrant.

Script:

“Thanks for jotting down your thoughts on why you join and why you leave groups and organizations. One of the important aspects of an organization’s on-going planning is to focus on what attracts talented, energetic people to an initiative, project or activity. Equally important is to understand what negative factors can interrupt the effectiveness of a group over time, especially what prompts a formerly excited and energetic person to quit the group.

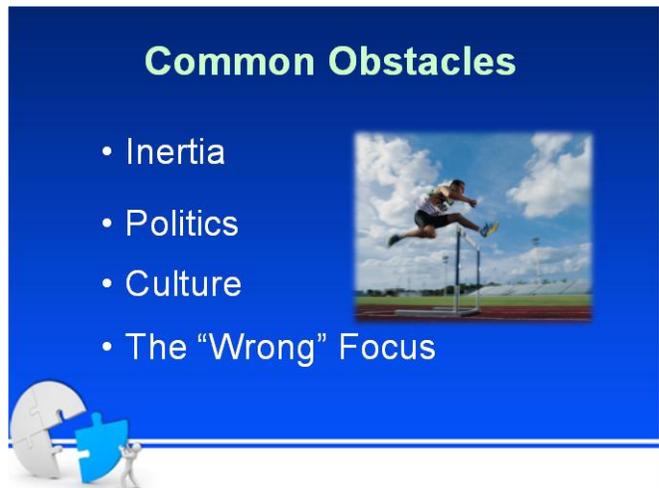
Let’s hear from three or four of you as to why you joined a particular group. Then, let’s hear from a different three or four of you as to why you quit participating in a group in which you initially had a good bit of interest when you first joined. What happened?

[After you have gathered the input from some of the participants, say the following:] Thanks for giving us those real world examples. Are there common reasons to join and leave groups? These insights can guide your organization in designing ways to keep members of your group involved while avoiding those negative aspects that prompt people to leave the team. How can you incorporate these insights into your group’s regional planning efforts? Let’s hear from several of you.”

Slide: 11

Time: 4 Minutes

Activity: Discuss common obstacles



Common Obstacles

- Inertia
- Politics
- Culture
- The “Wrong” Focus

Instructions:

Now that the group has offered reasons for joining and leaving groups, share with them what has often emerged as factors that have slowed down the work of a regional team. Then proceed to the next slide since it describes these four obstacles in a bit more detail. Once you reviewed this slide and the next one, ask the group to identify other factors that have impacted the effectiveness of a group.

Script:

“Sooner or later, your regional initiative will be challenged. Something bad will happen that tests the drive and energy of the group. It always does. Sometimes, those challenges will be big and bold. Other times the challenges will be small, but compounding. We’ve tried to categorize each of these challenges that commonly surface in the kind of work you are pursuing as a regional team.

The loss of momentum can lead the group to **inertia**. [Inertia is the idea that things are stagnant until acted upon, or in simple terms, not moving.] I’m sure you have all seen it. An initiative starts out going great. Once the work needs to get done, people begin to realize change will take place. Resistance to change can be a big problem. Leaders might also start to see that this could fail. The fear of failure can sideline an effort quickly.

It’s not always an individual issue that causes an initiative to run into trouble. **Politics** is another common obstacle and one that probably will always exist. Often, there are issues with leadership structures and funding mechanisms. For many regional efforts, several jurisdictions may be working together toward some common end. At other cases, the jurisdictions simply are not willing to work with one another.

Culture likely plays into your regional work. Culture can have many different meanings, but in this case we mean the culture of regional cooperation. Some leaders can pose difficult challenges because they are only willing to cooperate if the majority of the benefits are realized in their community. Culture can also come into play when people are independent and value self-sufficiency. This can lead to unwillingness to get help from others.

Every group goes through a development process. Often, in the early stages, it's challenging to know where to focus. Many times, an early move by the group is to just pick something and do it. This can lead to the "wrong" focus (that is, it can be too narrow or inadequate) in the long run. Some examples might be assisting one single major business enterprise or attracting a firm that is part of a declining industry that is going to have a tough time surviving over the next 5-10 years.

It's important to remember that these are the common obstacles from our experience in regional economic development. You'll likely run into one or all of these in your regional initiative, so being prepared is critical. You might also be able to think of other common obstacles. What might be some of the obstacles that you have seen time and time again?"

[Write down these obstacles on a flipchart].

Slide: 12

Time: 5 Minutes

Activity: Read script

Overcoming Obstacles

- **Inertia** - Define a clear, compelling call to action
- **Politics** - Identify a mutual benefit from action
- **Culture** - Establish regional cooperation
- **Wrong Focus** - Uphold a long-term economic development outlook



Instructions:

In the previous slide, we discussed some of the common obstacles that interfere with the ability of group to get things done. Now we want to discuss some of the possible solutions for getting past these obstacles. Share the highlights on this slide and then get the group to react to the items listed. Invite them to add to the list.

Script:

“Let’s take a minute to look at the ways in which we might be able to overcome some of the common obstacles that get in the way of moving your regional initiatives forward. Some ideas are shown on this slide. Let’s review these items. Next, I’d like to invite you to offer some additional ideas on how to overcome the four obstacles I have listed on the slide. I’ll record your ideas on flip chart and then we can discuss which of these makes the most sense for your group.”

[After you have shared the highlights of what is on the slide, ask for additional ideas from the group]

Slide: 13

Time: 5 Minutes

Activity: Read script

Regional Leadership Team

Purpose

To influence, motivate and enable others to contribute to the effectiveness and success of the regional plan.



Instructions:

Introduce the key concept of a regional leadership team. Help participants evaluate the role businesses and organizations play. Participants should be reminded that diversity is more than race or sex.

Participants should think about the diversity of industries and life experiences that members may bring to the team as they work to create or strengthen their regional leadership team.

Script:

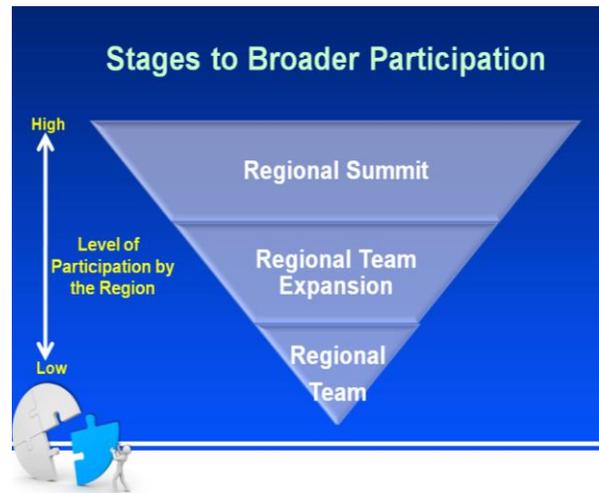
“Having a strong and diverse leadership team can make a significant difference in terms of the success or failure of a regional effort. As you can see, the purpose of a regional team is to motivate others to participate. An effective team will have:

- New perspectives
- Diversity of experiences
- The ability to understand needs of a changing region
- Ability to manage current resources
- Ability to have an eye on the future
- Capability to foster community participation”

Slide: 14

Time: 3 Minutes

Activity: Read script



Instructions:

The issue on which we want to focus in the next series of slides (Slides 15 through 20) is whether the regional team that has been assembled to take part in the SET training has a good mix of participants. We're going to deal with this question by walking the participants through three stages: (1) Examine the make-up of their current regional team; (2) Determine if additional people need to be invited to join the team; (3) finally, explore the idea of a Regional Summit as a way of offering a broad array of people and groups the opportunity to weigh in on the goals and plans of the regional team.

Script:

"We want to spend the next several minutes discussing the composition of your regional team and determining whether we need to explore ways to expand your team. We'll then discuss the notion of a Regional Summit, something that you might want to consider doing at some point. Such a summit would offer you the opportunity to share your regional goals and plans with more people and groups in the region. By so doing, you will gain a broader base of support and "buy-in" for your efforts. As you can see from our diagram, moving up from the bottom tier of the triangle to the upper tier of the triangle, the level of participation by people and groups in your regions expands – something that is good for the success of your work over the long run.

So, let's begin by looking at who's involved in your regional team right now."

Slide: 15

Time: 5 Minutes

Activity: Read script



Instructions:

Take a few minutes to ask the group to take a hard look at their regional team. Is the mix of people and groups that are listed on this slide represented on their regional team. This is the focal point at this stage in Module Three.

Script:

“Given the important attributes of a leadership team we just discussed, let’s take a moment to examine the composition of your regional team. One valuable way to do so is to see what major segments of the region your team members represent.

While there’s no straightforward answer to the question, “Who should be on our team”?, a couple of key examples can provide guidance.

The EDA (the Economic Development Administration) has invested a significant amount of time and resources in an initiative that it began in 2005 called the WIRED program. This program is designed to bring together state, local and federal entities; educational institutions (including K-12, community colleges and universities); investment groups; foundations; and business/industry and others in order to tackle the challenges associated with establishing a globally competitive and prepared workforce. From the vantage point of EDA, having in place a regional alliance that connects public, private, and the nonprofit sectors together to guide the WIRED effort is important. So, the mix of members that EDA recommends might also be a good reference point for your own regional team. [WIRED stands for “Workforce Innovation in Regional Economic Development Initiative.”]

Another valuable source of information is a report published by RUPRI (the Rural Policy Research Institute) in 2006. It identifies the eight principles for effective rural governance. What is governance? It refers to the involvement of different governments (such as cities, counties, parishes, and regions), but it’s more than that. It also relates to decisions and implementation strategies that are determined by a variety of people, organizations and institutions beyond government. It includes business associations, universities and community colleges, nonprofit groups, faith-based organizations,

community foundations, and others. The report goes on to state that decision-making that fails to include the insights and contributions of this broader array of representatives is likely to be unsustainable since it may not reflect the hopes and aspirations of the entire region.

If you look at our slide, you'll see the mix of groups and residents (i.e., youth, elderly, minorities) that represent important voices to your regional team. To what extent do these individuals and groups have membership on your team? Let's move onto the next slide to see how we might be able to get a better handle on this question."

Additional Comments:

Dabson, Brian (2006).

Slide: 16

Time: 10 Minutes

Activity: Group activity

Workbook: Worksheet 3

Your Regional Team Members

Name of Team Member	Major Sector/Interest Area the Person Represents
Example: Joanne Smith	Business (Banker)
Example: Dr. Barbara Jones	Education (Comm. College President)



Instructions:

This slide is intended to offer the participants an opportunity to determine the mix of people they have on their regional team (or, if their team is not yet assembled, they can begin to identify the people they may need to consider including on their regional team). Have the group complete the worksheet on their team and see how well they touch on all the groups and participants shown on the previous slide. More often than not, the group will probably be dominated by individuals from local government and the business sectors. If that's the case, you want to challenge the team to look for members beyond these two sectors. Broader representation is crucial to getting buy-in by people, communities, and organizations that are part of the region.

Script:

Let's take a look at your current team membership and fill in the worksheet that outlines your Regional Team's Membership. We want you to fill in the names of your current members. Next, we want to identify the specific sector or interest area each person represents. We've provided a couple of examples on the slide to give you a better idea of how to classify members of your regional team.

[Note: You can do this activity as an entire group or you can have the team break up into small groups of 4-5 people and have them complete the worksheet in that manner. Make sure that the participants have a list of the people who are part of the regional team (or a list of who's being considered in the event the whole team is not yet assembled). If you divide the group into smaller teams of 4-5 persons, give them about 5-10 minutes to complete this activity and then get the group back together. Then, discuss with the group the mix of people and groups that are represented on the regional team].

Now that we've taken a careful look at the membership of your regional team, what would you conclude? Is your team dominated by a limited range of sectors or interest areas? If so, what do you feel your team needs to do about it? How can we broaden the representation on the team? What additional sectors/interest areas might need to be added? Who might be good candidates to invite? Who would like to contact these potential new members?

As you can see, we've just touched on the second phase of the diagram we outlined on Slide 14. That second phase seeks to explore ways to expand participation in your regional initiative.

[Note: If the regional team has done a good job ensuring that it has a broad-based mix of people on the team, congratulate them for doing such a great job] !!

Slide: 17

Time: 5 minutes

Activity: Read script

Building Your Leadership Team

WHO...

- Influences the success of the strategy
- Has skills necessary for implementation
- Has needed resources
- Is a respected leader of a key sector or interest area
- Will spread the message and encourage buy-in
- Represents emerging industry sectors
- Represents diverse populations



Instructions:

This slide is a nice follow-up to the discussion of the regional team membership. If the group realizes that it needs to expand its membership, then this slide outlines the skills they might want to seek in new members (and in current members, as well). As we note below, no one person will be able to fulfill all these requirements. What we're looking for are team members that together can offer these important strengths to the team.

Script:

"Now that we've reviewed the composition of the regional team and determined whether the membership of the team needs to be expanded, let's take a look at some of the important characteristics that team members should have in order to get things done in the region. Our slide outlines some of these important attributes. Of course, no one person can fulfill all of these requirements, but you'll be looking for members who collectively have these important sets of skills. What we want are members of your leadership team who . . .

- Can influence the success of the strategy
- Has special skills that implementation may require
- Has the needed resources to actively participate
- Is respected as a leader in his/her sector or interest area (this would include representatives on non-governmental groups, such as nonprofits, voluntary groups, faith-based institutions, etc.)
- Will help spread the message and encourage buy-in throughout the region
- Represents emerging industry sectors
- Represents the diverse populations of your region

Slide: 18

Time: 20 Minutes w/ activity

Activity: Complete workbook

Workbook: Worksheet 4

Call to Action: Basic Principles

- Communicate regional needs and challenges
- Present goals/strategies
- Provide reason for action
- Identify timeline
- Make sure plans are clear and understandable



Activity:

5 Minutes: Instructor introduce the basic principles of the call to action

10 minutes: Participants will work through specific examples of how they will meet the basic principles of a call to action (small groups are the preferred way to do this)

5 minutes: Instructor asks for two examples from Worksheet 4

Instructions:

Take a few minutes to talk about the bullets listed above. These are the principles of a call to action. Making sure a call to action includes these elements can improve the chances of success. After briefly highlighting these bullets, move quickly to the worksheet. The participants will have a chance to work through each of the items. Let the participants work in small groups to discuss the things they will do to make sure their call to action is an inviting and productive one.

Script:

“We want to discuss a ‘call to action’ as something your regional team might want to consider doing. A “call to action” is a deliberate effort by your regional team to inform and mobilize more people to become involved in your regional effort. Even though you may have good representation on your team, you want to find a way to get broader support for your regional goals and plans from people and groups that reside in the region.

Our slide showcases some of the basic principles that can make a call to action effective. As you can see, these are straight-forward and logical principles. The real challenge is accomplishing these principles. For instance, it isn’t easy to effectively communicate a regional challenge (including global/national effects on your region), especially in a way that meets the needs of everyone you want to invite to your leadership team. Each person might have a different issue or concern to which they would respond. So

your call to action might need to be modified to make it compelling for the different people or groups you are trying to attract to your team.

For the next ten minutes, I'd like you to find partner and work through some of these principles. I want you to look at Worksheet 4 and write down your responses to these items. These are some of the things you want to have ready to share with those that you want to invite to be part of your team. This will give these individuals or groups a better feel for the purpose of your regional team and what you are trying to do as a team.

We'll take about ten minutes for you to do your work. Then, I'll stop your discussions and ask for volunteers to talk about the examples you construct.

[NOTE: Ask for two or three examples. Don't let this discussion go on for much longer than 5 minutes]. Thank you for all of your participation. Now, let's move on to another aspect: the Regional Summit."

Slide: 19

Time: 10 Minutes w/ activity

Activity: Complete workbook

Workbook: Worksheet 5

Call for Local Participation: A Regional Summit

- Summit convener should be seen as neutral
- Stakeholders must “own” the process
- Stakeholders must see benefits to participation
- Adversaries should be welcome
- Active participation should be sought



Instructions:

Community participation is critical in any effort. You should make it clear that the SET participants have to invite local communities and residents to be partners in the development of a sound regional economic development plan. If local/regional stakeholders feel they have some ownership of the plan, they will be more likely to help get the plan off the ground.

This slide is exploring the idea of hosting a regional summit, or a series of meetings across the region (which represents the third phase of the triangle we presented in Slide 14). The intent is to put in place a mechanism for getting greater buy-in on what your regional team is trying to pursue with regard to regional economic development.

NOTE: The idea of a summit, or a series of roundtable meetings across the region, is something that the regional team will want to do once it has developed goals and defined more of its strategies and activities. But, we want the group to be aware of the summit or regional roundtables as a valuable way to communicate its work out to the larger public, to get public input, and to then refine its plans based upon that public input.

Script:

“If the broader community is not part of economic development, who, then, benefits? What if your group picks projects and initiatives that only benefit a small slice of the region? What if the most pressing regional issues are not addressed?”

These are some of the reasons your team should take steps to secure broader community participation. As a practical matter, everyone can’t participate all of the time. So knowing when to ask for additional input is critical for your leadership team to consider. Organizing and hosting some type of regional summit, or a series of meetings across various parts of the region, is a valuable way to get more buy-in by people, organizations and institutions that are part of the region.

If you pursue the idea of a Regional Summit (or something similar), a few principles will aid you in garnering broader community participation and support.

1. It's important that your team be viewed as a neutral body that can bring multiple interests together. If that is not possible, work with an organization that can be viewed as a neutral convener (such as a college or Cooperative Extension Service educator) to serve as a co-sponsor of this event.
2. It's important for your team to encourage people to take part in the summit who represent diverse backgrounds.
3. Ask adversaries to take part; keeping them out of the summit can cause problems for you down the road. By making them part of the process early, they might in time become supporters of your efforts.
4. Be prepared to demonstrate the benefits to the people that you wish to have participate in the summit. It's not enough to say that the participants will feel good about being part of something big. They need to be able to see the specific benefits they will individually receive, or their community or organization will receive, because of their participation.
5. How can those taking part in the summit be able to help out? What role can they realistically play in your regional initiative? Be ready to describe some options for them.

Take a few minutes to write down some ways you think your team can meet these expectations, as well as other expectations that are not listed. I would like you to think about this on your own for 3-5 minutes. Use Worksheet 5 to help guide you through this activity.

[Let the participants work on their own for a few minutes. Then ask a small handful of people to share their ideas on the items listed on Worksheet 5].

Slide: 20

Time: 20 Minutes

Activity: Complete workbook

Workbook: Worksheet 6

How to Invite Participation

- Engage multiple organizations to identify potential participants
- Ensure a balance of diversity
- Encourage feedback via a regional “summit” meeting, roundtable workshops across the region, and/or other feedback mechanisms



Instructions:

The purpose of this slide and the related activities is to get the participants to think creatively about who should be invited to the regional summit or to the series of roundtables you hope to carry out in various areas of the region.

Keep in mind there isn't one right way to do this. Every region has a different way of doing things, so treat these as suggestions, not proven facts. You'll likely get a lot of discussion at this point as people share what has worked and what hasn't. Let the discussion happen and let it work. Ask the group to work in teams of 4-5 persons. Then ask each team to share their ideas with the entire group.

Script:

“Inviting participation is done differently in every community or region. Each community has its own approaches or norms for getting people to come to events, such as a Regional Summit. Sometimes these norms are helpful, and sometimes they get in the way. Here are some ideas to get you started as you think practically about what you will do to get more and diverse (supporters/detractors) people to take part in a ‘call to action.’

For the next 10 minutes, I would like you to work with a small group to discuss the ways you might invite individuals to take part in a Summit or to offer input using some other channels (such as a roundtable meetings in key places in the region). Use Worksheet 6 to record your ideas.

[Let the participants discuss. Help groups that are having trouble getting started. Let the discussion go longer, if needed.)

Thanks for your great discussion. I heard some fantastic ideas. Can I ask one of you to share an idea or two from your group?

We've generated a great list that we revisit later in our SET program. We're going to want to work on our vision, goals, strategies and activities before we are ready to host a regional summit or other meetings to inform the public and to seek their feedback.

Of course, if you want to get public input along the way, let's say after you define your regional vision and goals, that would be fine. This is pretty much up to you to determine at what stage you want to invite broader input into our regional plans."

Slide: 21

Time: 35 Minutes

Activity: Complete workbook

Workbook: Worksheet 7



Ways to Incorporate Participation

- **Inform**
 - Educational presentations
 - Public relations
- **Consult**
 - Solicitation of frequent feedback
 - Surveys, polls and targeted meetings
- **Consensus**
 - Regional Summit
 - Roundtables/focus groups



Instructions:

This is intended to serve as a wrap-up to our discussion of how to broaden the involvement of people and groups in the region. While we've discussed the idea of a regional summit or roundtable meetings, there are other ways in which you can keep people informed and in the loop. This slide highlights some of these. Help the group think about these different strategies and who on the team will take leadership in getting these things done.

Script:

"We have thought about how to invite participation and how to get a broad group into the loop on what your regional team is doing, or will be pursuing, in the region. While we spent some time discussing the idea of a regional summit or roundtable sessions across the region, there are other activities that can be done to help gain support for your efforts. These are listed in Worksheet 7. The question is, 'Who is going to carry out these activities?' It's something that your team needs to consider. Keep in mind that it's a great idea to find out which members of your team would feel comfortable doing these various activities.

As the slide shows, there are three major levels of public involvement: inform, consult, and consensus. You might see these as a continuum of engagement with your stakeholders in the region.

Informing is a one-way communication (brochures, press releases, websites, newsletters) designed to inform the public but with little opportunity for the community to provide additional input;

Consult provides a forum for individuals and groups to offer their feedback to your plan. It's not intended to get you to make changes in your plan at this point. Your team will study the information and then work to determine how best to use the information you've gathered on the regional plan.

Consensus is an interactive way for people to participate. Here, your team and the participants take part in a more active discussion of the plan. Decisions on changes to be made on the spot during the summit or workshop meetings.

Take a few minutes to review the worksheet and identify members of your team that you feel would be ideal candidates to carry out these important roles.

[Ask them at this point to independently work on filling out the worksheet. After 5 minutes or so, invite people to share with the group what names they identified for the three strategies of inform, consult and consensus].

A final point I'd like to make is that it's important for your group to consider pursuing activities that touch on each of these three approaches."

Slide: 22

Time: 4 Minutes

Activity: Read script

The Essential Succession Plan

Will important people leave your group,
often with little notice?

The answer is almost always . . . **Yes!**
What next ?

Are you prepared for a smooth transition?



Instructions:

Show this slide and encourage a brief discussion. Ask your group if they have prepared a succession plan (or have thought about such a plan) for their regional team.

Script:

How many of you have witnessed an unexpected exit of an important person from a planning committee? (Show of hands.) In all likelihood, if you have been in many groups for an extended period of time, you've seen this happen.

When you look back on those instances, was that group organized enough to have a succession plan already in place for the departure of key committee members? If there was no plan in place, what happened? What were the negative impacts? How did it affect the organization?

If there was a succession plan in place, how did that go? Was the transition from the exiting person to the new person reasonably smooth? What were the positive benefits of having that succession plan in place for the organization?

I'd like to have one of you to tell a 60 second story about how not having a succession plan in place adversely affected the group's initiative. Then, if someone has an example, would you please give a 60 second story about the your group that did have a succession plan in place? How smooth was the transition from having an important person leave to filling that position with another competent and energetic person?"

Slide: 23

Time: 5 Minutes

Activity: Instructor reads script

Creating Your Succession Plan

- Establish plan early in the process
- Create a job description for each position, including skill set needed and duties
- Communicate time commitment
- Ensure the overall mission is clearly written



Instructions:

It is important to cover the bullet points and follow with a brief discussion. Encourage comments and observations as you cover the script with them.

Script:

“We have explored the problems that occur for an organization when there’s no good succession plan in place. Many of you have experienced them first hand. It can be a real pot hole, or worse, along the road to accomplishing the goals of your regional economic development team.

Regional economic development initiatives take months, if not years, to accomplish. Ideally, the original talented leaders that created the project stay on until the goals are fully accomplished. But that’s not how it usually works. Busy and talented people have several irons in the fire. They can devote a set amount of time to the initiative and then they move on. Fair enough. You are glad to have had their talents and services.

If you have a well developed succession plan in place, it will be easier to fill the shoes of your valuable exiting members. You will already have created a brief job description which outlines the duties, skills and amount of time needed in that position. Along with telling the positive story of your important regional economic development initiative, you will be giving the prospective member a clear and fair idea of what this important position involves. Having such a clear picture will increase the possibilities of recruiting a new talented and energetic person. Makes sense, doesn’t it?

The bottom line is that it doesn’t hurt to have position responsibilities and duties spelled out for members of your team. It will help contribute to shared work load and responsibilities rather than having an unfair demand placed on one or two members. The more you spell out the position duties and the estimated time to accomplish them, the happier your team members will be.

The plan does not have to be a long document. This isn’t a Fortune 500 company succession plan. Think through the obvious pieces of information any committee member would want to know. The secret is to create this succession plan at the beginning of your regional economic development effort, not months or years after you group has been in place. It will help attract your charter members in the

beginning (if you are a newly organizing team) as well as recruit additional members that will follow in the positions of those who will inevitably leave.

What has your group done in the way of creating a succession plan? If you have one, briefly describe it. If nothing has been set up yet, when will you get started on doing so? This is an important foundation piece of a strong, long-lasting initiative.

Slide: 24

Time: 10 Minutes

Activity: Read script

Effective Regional Leadership: *The Seven Habits*

1. Be proactive
2. Begin with the end in mind
3. Seek first to understand, then to be understood
4. Put first things first
5. Think win-win, be inclusive
6. Synergize
7. Sharpen the saw



Source: Council on Competitiveness (2010)

Instructions:

A great way to summarize Module Three is to highlight a 2010 report by the Council on Competitiveness that showcases the 7 key habits that lead to a highly effective regional leadership team. Review these seven habits. Information on each of the habits are provided in the Script.

Script:

"I want to share with you the highlights of a 2010 article that was published by the Council of Competitiveness. The article, which appeared in the Council's *Collaborate* publication, highlights the seven habits that promote highly effective regional leadership. Let me highlight these seven habits:

1. Be Proactive: Anticipate needs, create strategies and the means to address them.
2. Begin with the End in Mind: While action depends on leadership, accomplishments depend on vision. Regions need a vision of where they are heading and that vision has be supported by a significant consensus. Beginning with the end in mind is as much about process as it is about outcomes.
3. Seek First to Understand, then to be Understood: Gather facts in order to make sound decisions. Understand the region by securing data, determining assets and liabilities, as well as opportunities.
4. Put First Things First: Leaders need to be guardians of the big picture – vision, goals and strategy.
5. Think Win-Win, Be Inclusive: Seek win-win opportunities to make the case for regionalism; promote inclusion.

6. **Synergize**: There are crossroads where institutions (education, financial), firms, political jurisdictions and public agencies intersect. Find ways to get them to work together which builds synergies.
7. **Sharpen the Saw**: Develop metrics that are tied to measurable goals. Develop future leadership that will be able to step up and be part of the regional team at some future point.

Some of these important principles have already been touched in this module, but some will be explored further in the upcoming SET modules.

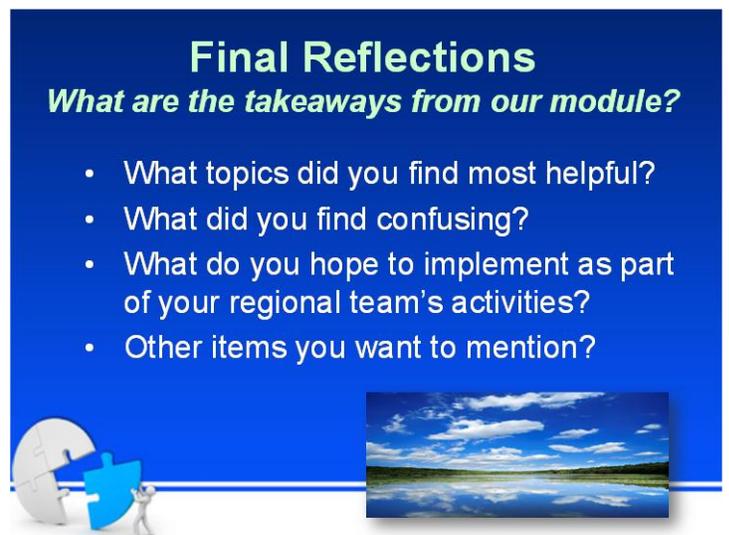
Additional Comments:

Council on Competitiveness (2010).

Slide: 25

Time: 5 Minutes

Activity: Read script



Final Reflections
What are the takeaways from our module?

- What topics did you find most helpful?
- What did you find confusing?
- What do you hope to implement as part of your regional team's activities?
- Other items you want to mention?



Instructions:

Allowing time for reflection on what the participants learned during the day is critical. Allow people time to consider how they will use the information they've learned. When they have all had a few minutes to think about the questions on the slide, ask everyone to share ONE thing about Module Three that they consider valuable. Don't let people go on for too long.

Script:

"Think about what we have been doing today in Module 3. I'd like you to consider the questions outlined on our slide. Take a moment to jot down your thoughts on these questions.

[Give the group a few minutes to come up with their responses to the questions].

Let's open it up for discussion. What did you find most valuable or helpful in this session? Are any of the topics confusing to you? What items do you hope your team will implement in the future? Are there any other items you want to mention or comments you want to add?"

Slide: 26

Time: 5 Minutes

Activity: Read script

Looking Ahead

In Module Four, we will:

- Review the important attributes of a good vision statement
- Develop/refine your team's vision statement
- Focus on your regional goals



Instructions:

Discuss the next session with the participants.

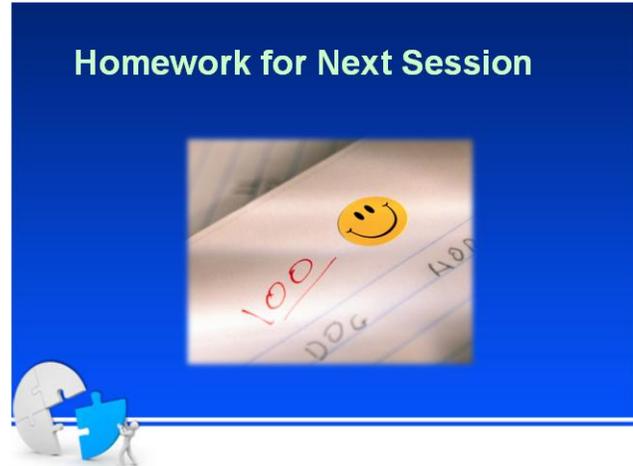
Script:

“Let’s take a quick look at the items you’ll be working on in the next session. As you can see, we’re going to talk about developing a vision and goals, something that was identified as a key ‘habit’ of an effective regional leadership team.”

Slide: 26

Time: 5 Minutes

Activity: Read script



Instructions:

Discuss the homework for the next session and answer any questions.

Script:

“Before the next session we would like you to complete the following homework”

[At this point, come to an agreement on what needs to be done as a follow-up to Module Three (or in preparation for Module Four). For example, you might:

1. Follow up with people or representatives of key groups that you want to invite to be part of an expanded regional leadership team. Develop an appropriate ‘call to action.’
2. Determine the resources that might be useful to have for Module Four – such as existing documents that outline a vision or goals for the region.
3. Develop a position description for key roles within your regional team”