



Stronger Economies Together

Strategies for Building New Economic Opportunities

Module Three: Building a Strong Regional Team

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Module Three: Building a Strong Regional Team

This instructor's guide outlines the content, handouts, activities and scenarios 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 the *Participants' Guide*

The *Participants' Guide* contains handouts designed to assist participants in planning their economic development effort.

Using a Scenario

A scenario is utilized in this training for two reasons. First, it challenges participants with actual situations that they may encounter, allowing them to be exposed to these issues in a low stress environment. Second, a scenario easily injects key concepts and leadership dilemmas into training.

The trick to an effective scenario session is being a good storyteller. Your job as the instructor is to immerse the participants into each situation. The presented situations 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:

- Do not 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.

Group Exercises

Slide 1:	Group introductions; use ice-breaker if desired
Slide 2:	Reflecting on the Previous Session
Slides 4-5:	Green Light/Red Light (Handout One)
Slide 8:	Who is at Your Table? Who Else Should Be?
Slide 9:	Who Else Should you Invite to Join? (Handout Two)
Slide 10:	Power and Interest
Slide 11:	Building Your Regional Team
Slide 12:	Call to Action: Basic Principles (Handout Three)
Slide 19:	Is This Exactly How It Goes?
Slide 26:	Case Study
Slide 28:	Challenge (Handout Four)
Slide 29:	Collaboration expansion (Handout Five)
Slide 31:	Final Reflections



References

Bryson, J. M. (2004). What to do when stakeholders matter: Stakeholder identification and analysis techniques. *Public Management Review*, 6(1). pp 21-53.

Dabson, B. (2006). Eight principles for effective rural governance and how communities put them into practice. Columbia, MO: Rural Policy Research Institute. Retrieved from www.rupri.org/Forms/RGIreport.pdf

Economic Development Administration. (2010). Module 2: Leading the planning effort. *Know Your Region*, Retrieved from <http://www.knowyourregion.org/workshop-modules/leading-the-planning-effort>

International Association for Public Participation. (2007). IAP2 Spectrum of public participation. Retrieved from <http://www.iap2.org/associations/4748/files/spectrum.pdf>

Leiken, S. & Kempner, R. (2010). The challenge of regionalism and the elements of regional collaboration. In Council on Competitiveness, *Collaborate. Leading Regional Innovation Clusters*. (pp. 56-60). Washington, D.C.: Council on Competitiveness, Retrieved from http://www.compete.org/images/uploads/File/PDF%20Files/Final_Collaborate.pdf

Leiken, S. & Kempner, R. (2010). The seven habits of highly effective regional leadership. In Council on Competitiveness, *Collaborate: Leading Regional Innovation Clusters*, (pp. 56-60). Washington D.C.: Council on Competitiveness, Retrieved from http://www.compete.org/images/uploads/File/PDF%20Files/Final_Collaborate.pdf

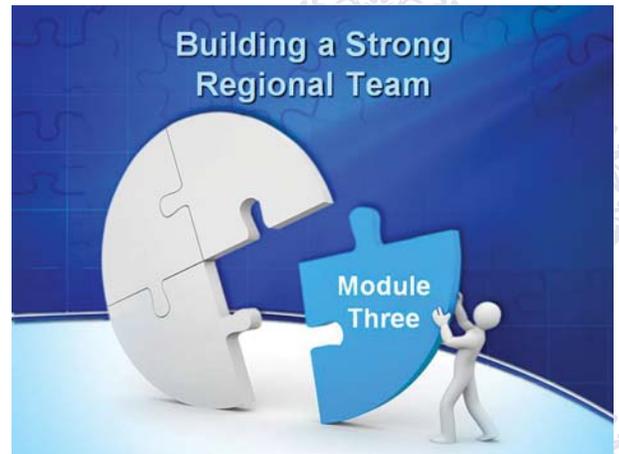
Radke, B. (2010). How do we engage the public successfully? *Engaging with the Public*, The University of Minnesota. Retrieved from <http://www.extension.umn.edu/distribution/citizenship/components/00018b.html>

Tuckman, B. (1965). Developmental sequence in small groups. *Psychological Bulletin*, 63(6). pp. 384-399. Retrieved from <http://www.mph.ufl.edu/events/seminar/Tuckman1965DevelopmentalSequence.pdf>

Workforce Innovation in Regional Economic Development Initiative. (2006). U.S. Department of Labor. Retrieved from http://www.doleta.gov/wired/about/eta_default.cfm

Instructions:

Module Three encourages participants to build a strong regional team. Each team needs to consider if they have included the right mix of people with the right set of skills and perspectives. If the team needs to expand, this is the right time to do so before they get involved in formulating an economic development plan for the region.



Slide: 1

Time: 15+ Minutes. Please have this slide showing as participants arrive.

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 worked together for some time, this module will provide ideas and strategies that can help make your efforts even more successful in the region.”

Instructions:

Have participants discuss the three questions displayed on the slide, either in small groups or as an entire group. Make sure the participants recall the key points from the last session, and provide an opportunity to clarify anything that didn't make sense. Facilitate this discussion in whatever way is most appropriate for the group.

Script:

“Before we get started talking about this module, let's take a few minutes to reflect on the previous session.”

[Ask individuals to share what they found most useful, relevant activities undertaken since the last meeting and anything they feel needs to be clarified. Go around the room asking participants to respond to these questions.]

Reflecting on the Previous Session

- What was most useful from the previous modules?
- What progress has your group made since the previous session?
- Any comments or questions about the previous session?



Slide: 2

Time: 10 Minutes

Instructions:

Read through the outline of Module Three.

Script:

“Strengthening the ‘people’ element of regional economic development will be the focus of this module. Much of this work involves you, the SET regional team, being prepared for the ups and downs that occur when organizing people and groups with diverse interests.

[Review the bullet points on the slide.]

The bottom line is to find solutions and options that might work in your region, test them out and implement what works best. Please feel free to add your thoughts to the conversation at any time.”

In This Session We Will:

- Consider the composition of effective regional teams
- Develop a call to action
- Examine small group development
- Explore successful regional collaborations



Slide: 3

Time: 1 Minute

Instructions:

Exploring the reasons people are inspired to join an organization and contribute their skills, energy and time is an important consideration. Most people have been part of a group only to have later lost some interest or even quit the organization. Some common themes usually emerge when exploring reasons why people join groups and reasons why they leave. This slide and the next, along with Handout One, will help the participants think about the good and the bad aspects of being part of a group and about incorporating the good features while avoiding pitfalls that can discourage sustained involvement in the group's efforts. Keep this activity upbeat and moving quickly.

Script:

“There’s no doubt all of you have been a member of several organizations/groups over the years. We can learn a lot about strengthening this regional team from these past experiences.

On the first part of Handout One on the left side, list organizations to which you currently belong and are actively giving your time, expertise and energy. You can include any type of group: professional, nonprofit, social, religious, formal, informal, etc.

Now think about organizations to which you once belonged, but are no longer an active member. List these on the left side of the box on the bottom of the page.”

[Move to the next slide before getting feedback.]



Green Light/Red Light

- Organizations to which you currently belong
- Organizations of which you once were a member

The slide features two images of traffic lights: one with the green light illuminated and one with the red light illuminated. At the bottom left, there is an illustration of a person standing next to a large blue puzzle piece.

Slide: 4

Time: 7 Minutes

Handout One:
Green Light/Red Light

Instructions:

After completing Handout One, following the directions below, ask participants to quickly share some of the reasons they joined groups and reasons they left. Avoid storytelling at this point. The purpose is to get to the reason in search of themes. Record responses on two separate flip charts. Once you have these responses, ask the group to consider common themes that can be applied to their work as a regional team to promote involvement. For instance, some frequent responses to this exercise include such themes as time commitments, relevance to own interests, group dynamics, etc. Ask the group how these themes can guide their efforts to keep their team active and vibrant.

Script:

“Now go back to the top box. On the right side, list reasons why you are actively involved in these groups. What do you gain or give that makes the investment of your time worth the effort? [Allow a few minutes for people to jot answers.]

Now think about those organizations you listed on the bottom table. Why did you leave those groups? Quickly jot down a few reasons why you no longer invest time and energy in those groups. [Allow a few minutes for people to add responses and then ask for quick responses to why people contribute to or leave groups. Record answers on Joined and Left flip charts.]

Are there common themes for joining or leaving groups? How can you incorporate these insights into your group’s regional planning efforts?” [Allow for discussion.]



Slide: 5

Time: 8 Minutes

Handout One:
Green Light/Red Light

Instructions:

Building a strong, diverse team early is key to the success of the region's plan.

Script:

“Just as a football coach seeks to bring together a diverse set of athletes to build a strong team, your team will be stronger by thinking through who to include.”



Slide: 6

Time: 1 Minute

Instructions:

Discuss these key attributes of a strong regional team with the participants.

Script:

“Your job as a regional team is quite important. This slide outlines some of the 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 sustain that energy. Let’s start by thinking about who else may need to be on the team to help add to its strength.”



A Strong Regional Team

- Prepares for obstacles
- Assesses group composition
- Engages more partners
- Promotes action
- Advocates



Slide: 7

Time: 1 Minute

Instructions:

Ask the group to take a hard look at the current composition of their regional team. Regional teams often are dominated by individuals from local government and business sectors. If that is the case, challenge the team to look for members beyond these two sectors. Broader representation is crucial to getting buy-in by people, communities and organizations in the region. Are the people and groups listed on this slide represented on their regional team?



Script:

“Let’s take a moment to examine the current composition of your regional team by seeing what major segments your team members represent. While there is 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), in a regional initiative similar to SET called WIRED, recommends the groups noted on this slide as important partners in regional economic development. [WIRED stands for ‘Workforce Innovation in Regional Economic Development Initiative.’]

Valuable guidance is also provided by a report published by RUPRI (the Rural Policy Research Institute) in 2006, which recommends involvement from business associations, universities and community colleges, nonprofit groups, faith-based organizations, community foundations and others. The report says 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. What other main categories might you add? [Allow for responses.]

Let’s take a look at your current team membership. Think for a moment about the categories/interests you represent. You may have more than one. Let’s quickly go around the room to tally who is already at the table. [Using a flip chart, list the categories (such as business, government, education) that members represent. Use tally marks beside each category to gauge the overall team composition.]

Let’s now move onto the next slide where we can start to think about how to fill in the gaps.”

Slide: 8

Time: 10 Minutes

Sources:

Dabson, B. (2006). Eight principles for effective rural governance and how communities put them into practice. Columbia, MO: Rural Policy Research Institute. Retrieved from www.rupri.org/Forms/RGireport.pdf.

Workforce Innovation in Regional Economic Development Initiative. (2006). U.S. Department of Labor. Retrieved from http://www.doleta.gov/wired/about/eta_default.cfm

Instructions:

Handout Two encourages the team to consider inviting others to the table who represent groups that are missing. It's ok if they can't list a person but can suggest a group or category. Encourage them to capture the names of new organizations or groups on Handout Two. Identifying appropriate individuals to fill those slots can be explored as homework. Diversity is key!

Script:

“Now, let's think about people representing diverse organizations or groups across your region who may need to be invited to this effort.

Diversity is a key word here. No doubt any number of organizations and groups could contribute to this initiative, yet these groups are not typically asked to participate in economic planning. They should be. The success of your group will be much greater with a broad, diverse group of people from your region. Be radically inclusive.

[In small groups or on their own] Using Handout Two, take five minutes to jot down the names of people and/or organizations or groups that should be at your planning table. When you are done, we'll take a quick look at some of the new people and groups you think ought to be considered for your team.” [Allow time for brainstorming, then have participants report back to the group.]

Who Else Should You Invite to Join?

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



Slide: 9

Time: 10 Minutes

Handout Two:
Who Else Should You Invite?

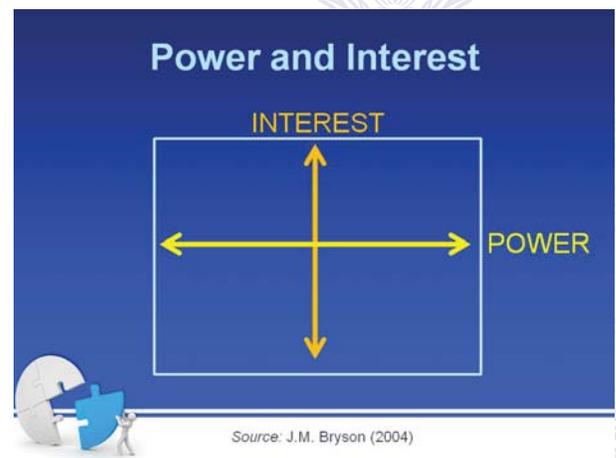
Instructions:

The power and interest exercise challenges participants to think critically about the needs, interests, and power of other stakeholders. This is useful because it can lead to multiple engagement and communications strategies which target stakeholder needs. For instance, a high power and high interest stakeholder might respond best to a personal invitation or a meeting with a leader from the SET group. Continually challenge the participants to be specific and have a clear rationale for their choices. You will need flip chart paper and markers for this exercise. When the participants have completed the exercise hang the charts on the wall around the room

Script:

“Considering the power and interests of other people is a useful strategic tool. It helps your team fit specific messages and efforts to the needs of your key stakeholders. High power and high interest stakeholders are very important to your effort and high interest/low power stakeholders are potentially allies. Please take a few minutes to think about the power and interest of the stakeholders you identified in the previous exercise.”

[Have participants work through this exercise by creating this slide on flip chart paper and writing in the names identified. The group can work as a large group or in small groups. For each stakeholder, challenge participants to name names of people (not just institutions) and be as specific as possible about their interest in SET. When finished, each group will be expected to share. Allow time for participants to discuss and write 10-15 stakeholders on the flip charts, then have participants report back to the group.]



Slide: 10

Time: 20 Minutes

Source: Bryson, J. M. (2004). What to do when stakeholders matter: Stakeholder identification and analysis techniques. *Public Management Review*, 6(1). pp 21-53.

Instructions:

While the previous slides discussed categories and interests to include, this slide highlights some other important characteristics of team members. While no single person will be able to fulfill all these requirements, together the team should possess these important strengths.

Script:

“Now that we’ve reviewed the composition of the regional team and determined where expansion is needed, let’s take a look at some of the important characteristics team members should have to get things done in the region. The slide outlines some of these attributes. Of course, no one person can fulfill all of these requirements, but collectively the team needs this important set of skills.

Your team needs members who. . .

- Can influence the success of the strategy
- Have special skills that implementation may require
- Have the needed resources to actively participate in moving the group goals forward
- Are respected leaders in the sectors or interest areas they represent (non-governmental groups, nonprofits, voluntary groups, faith-based institutions, etc.)
- Will help spread the message and encourage buy-in throughout the region
- Represent emerging industry sectors
- Represent the diverse populations of your region

Does this give you any other ideas of people or groups to include in your invitation list?” [Add names as identified.]

Building Your Regional Team

INVITE INDIVIDUALS WHO...

- Can influence the success of the strategy
- Have the skills necessary for implementation
- Have resources helpful to the group
- Are respected leaders of key sectors
- Will spread the message and encourage buy-in
- Represent emerging industry sectors
- Represent diverse populations



Slide: 11

Time: 5 Minutes

Instructions:

Now that the team has identified who needs to be invited, the next task is outlining the principles of a call to action that can improve the chances of success. After briefly highlighting these bullets, move quickly to Handout Three. Let the participants work in small groups to design an effective and productive call to action.

Script:

“With your invitation list in hand, developing a call to action is the next step to mobilizing more people to become involved in your regional effort. The slide showcases some of the basic principles that can make a call to action effective. While the principles are straight-forward and logical, accomplishing them is the real challenge. Each person might respond better to a different issue or concern so you may need to modify your call to action to make it compelling for the different people or groups you hope to attract to the team.

Using the questions on Handout Three, work with a partner on these principles for your region. Your responses will help you frame your invitation to potential new members by providing a better feel for your regional team’s purpose. We’ll take about 10 minutes for your work. [Allow time to work then ask for a few responses for each question. Avoid letting the discussion become too long.]

These are great beginning points to the call to action. Would two or three of you volunteer to fine-tune a call to action before our next meeting?”

Call to Action: Basic Principles

- Communicate regional needs and challenges
- Describe purpose
- Provide reason for action
- Identify timeline
- Make sure plans are clear and understandable



Slide: 12

Time: 20 Minutes

Handout Three:
Call to Action

Resource:
International Association for Public Participation has an excellent handout in its on-line toolkit. “Techniques to Share Information” can be found at http://www.iap2.org/associations/4748/files/06Dec_Toolbox.pdf

Instructions:

Part of creating a strong regional SET team is understanding a bit about how groups often form and develop. Just as building a house involves different layers and levels, so does building an effective group. The next few slides describe common stages in the development of a strong group.

Script:

“If you’ve ever been involved in building a house, you understand that some necessary processes take place to get to the final product. Part of creating a strong regional SET team is understanding that groups, like houses, go through various stages to form strong, effective teams. We’ll take a look at this in the next few slides.”



Slide: 13

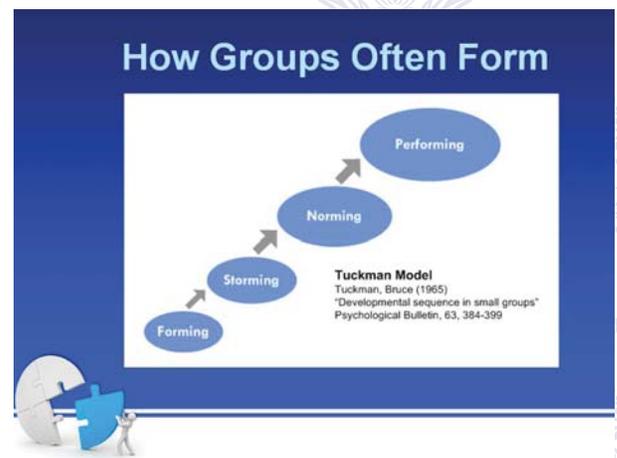
Time: 1 Minute

Instructions:

The next few slides will explore this model, created by Bruce Tuckman, that describes typical developmental stages of groups. Understanding these normal stages will help the team prepare for and navigate the changes ahead.

Script:

“Of course groups never form exactly the same. Nonetheless, most groups evolve along a similar pattern. Dr. Bruce Tuckman identified four common group development stages depicted on this slide. He maintained that these phases are all necessary and inevitable for the team to grow, to face challenges, to tackle problems, to find solutions, to plan work and to deliver results. His model provides an excellent description of typical group development. Each of the four steps builds on the previous. We’re going to take a closer look at his model in these next few slides. Understanding this evolution can help minimize surprises as to how groups act along the way. Let’s take a closer look.”



Slide: 14

Time: 2 Minutes

Source:

Tuckman, B. (1965). Developmental sequence in small groups. *Psychological Bulletin*, 63(6), pp. 384-399. Retrieved from <http://www.mph.ufl.edu/events/seminar/Tuckman1965Developmental-Sequence.pdf>

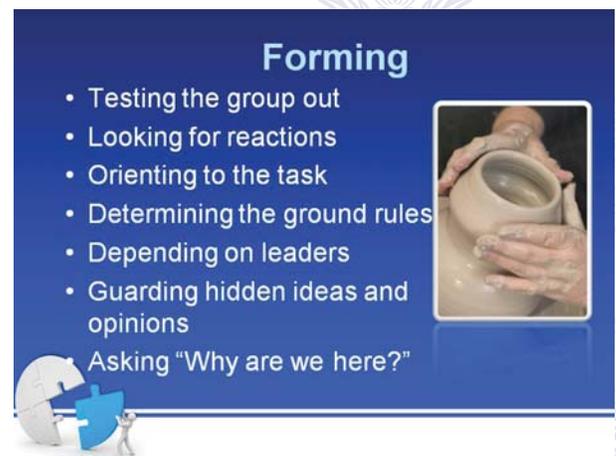
Instructions:

Explain the forming stage from the Tuckman Model using the bullet points from the slide.

Script:

“The first stage in Tuckman’s Model is ‘Forming.’ In this stage, individuals spend a majority of their time learning about each other. Individuals are testing the group and looking for reactions. The team’s mission, the individual expectations and the tasks are likely to be ambiguous. The focus is on building the relationships of team members and building trust. Strong leadership will likely be required at this stage to help define the initial tasks and expectations. The members will likely look to you and ask, ‘why are we here?’ For now, you’ll need a good answer.

This is an important stage in team development, so don’t minimize it. This lays the foundation for your team to work through the other stages of group development. The leadership tasks you need to undertake in this stage differ from future development stages. Be prepared to change your involvement as the team develops.”



Forming

- Testing the group out
- Looking for reactions
- Orienting to the task
- Determining the ground rules
- Depending on leaders
- Guarding hidden ideas and opinions
- Asking “Why are we here?”



Slide: 15

Time: 2 Minutes

Instructions:

Explain the storming stage from the Tuckman Model, drawing from the bullets for the basic characteristics of this phase.

Script:

“Storming’ is the second stage in Tuckman’s Model. Think of a thunderstorm. During the storming stage, you can expect to see conflict as individuals and organizations start to assert their ideas and compete for influence and control over the group process. While this stage may feel uncomfortable, the conflicts and polarization that occur help uncover the true needs of individuals and their sponsoring organizations.

As a leadership team member, the key is recognizing healthy conflicts and those that are not. For instance, personal attacks should never be allowed, as they are unhealthy to the group’s growth. However, conflicts related to where the team is headed, what things are important and how work should be done are all positive. Emotion is normal in this stage, but carefully monitor conflicts and keep them focused on promoting team success. Growth means movement, and with all movement comes friction. Being willing to openly discuss points of disagreement will open up opportunities to identify points of agreement.

How many of you have been part of a group in the ‘Storming’ stage? How did the group handle this stage? What did you learn from the experience?” [Allow time for brief discussion.]

Storming



- Conflict and polarization
- Group anxiety
- Lack of group unity
- Competition for position and power
- Resistance to group tasks
- Ineffective problem solving



Slide: 16

Time: 5 Minutes

Instructions:

Use these bullet points to describe the norming stage from the Tuckman Model.

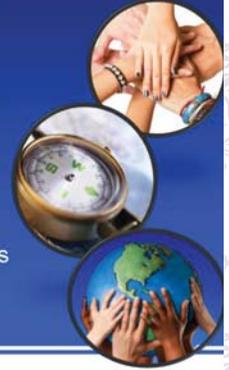
Script:

“Once the storm has passed, groups begin to move toward the third stage, ‘Norming.’ Resistance expressed during the ‘Storming’ stage is replaced by trust and cohesion. The group’s purpose becomes much more defined and accepted. Differences of opinion still occur, but they are resolved to the benefit of the group in a mature manner. Hidden agendas or cliques disappear as individuals accept responsibilities for mutually recognized roles. Team creativity and group confidence grows. They start developing a ‘We can succeed!’ feeling.

Reinforcing this new, productive behavior and group environment is vital. Leaders move toward asking and expecting results. Promoting and publicizing wins, both inside and outside the group, becomes a vital task as the maturing group begins the transition to the all important ‘Performing’ stage.”

Norming

- Trust forming; cohesion builds
- Purpose becomes well defined
- Hidden agendas become open
- Group norms and ground rules established and accepted
- Team gains commitment from members on direction and goals



Slide: 17

Time: 2 Minutes

Resource:

Committees that Work. Found at <http://www.extension.umn.edu/distribution/resourcesandtourism/db8621.html>

Instructions:

“Performing” is the last stage in the Tuckman Model. The bullet points from the slide depict the key elements.

Script:

“The ‘Performing’ stage is characterized by moving confidently ahead as a cohesive group and putting team needs before individual needs to accomplish the group vision and goals. At this stage, roles become flexible as structural issues have been resolved. The group has become a tool to solve problems and accomplish the vision and goals. Trust, openness and mutual support are high. Confrontation, maturely handled, is not seen as an evil that must never occur. A genuine feeling of confidence in accomplishing group vision and goals exists. They are now a fully functioning group.

Group leaders channel responsibilities to match strengths of individuals within the group and transition to a cheerleader role, urging the group on and praising group accomplishments. Frequently communicating and connecting with the various subgroups working on the project is essential to maintaining momentum.”



Performing

- Group energy channeled
- Roles become flexible and functional
- Structural issues have been resolved
- Group becomes a problem solving instrument
- Differences safely aired and resolved
- Members take pleasure in the success of the team - “We” replaces “I”
- Trust high
- Goals accomplished



Slide: 18

Time: 2 Minutes

Instructions:

While the Tuckman Model is time-tested, groups need to understand that team formation is seldom a “lock-step” process. Instead, groups may move back and forth between stages from time to time and experience some overlap between stages. However, recognizing that most groups go through these stages in some form can help group leaders respond accordingly to help the group grow.

Script:

“Anyone who has facilitated a newly formed group will have some understanding of the phrase ‘herding cats.’ While the Tuckman Model is a time tested model that describes what most small groups experience to become a fully functioning and productive group, distinct lines do not exist between the stages. Instead, teams may partially move ahead to the next stage in some areas while possibly slipping back to the previous stage on others. Some groups may spend little time in one stage of development before moving up to the next, while others may seem to take an inordinately long time to advance. It is important for the leader and the group to keep the initiative moving ahead even when the going seems a bit slow.

Understanding these stages, learning to read the group and knowing how to react are key leadership skills that will facilitate success toward regional goals. Conflict need not be seen as an evil to be avoided at all costs. Properly handled and processed conflict can create positive growth for the group.

What have you seen from past groups that mirror some of these stages? Have you worked with a group that walked through all four stages?” [Take time for a few brief stories.]



Slide: 19

Time: 5 Minutes

Instructions:

Growing, successful groups are also good networkers that understand how to create partnerships and collaborations. These connections are vital to stakeholder buy-in and success.

Script:

“As your regional team takes shape, you will quickly discover the importance of becoming good networkers and partnership builders in order to achieve success. The more stakeholders you bring into your group, the more likely you are to get buy-in across the region. This section explores ways to build these important linkages.”



Slide: 20

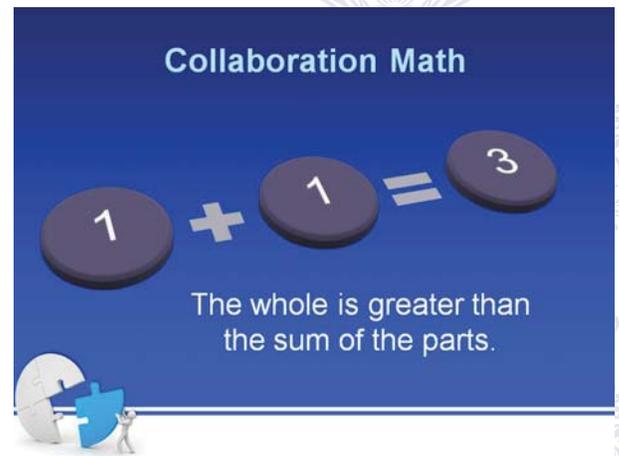
Time: 1 Minute

Instructions:

This “collaboration math” is a simple way to illustrate that more can be accomplished together than by working individually.

Script:

“While this equation will not likely win points on a math quiz, the truth expressed here is vital to big wins in collaborations. What the whole group can accomplish together will be greater than what each person or organization within the group can do individually.”



Slide: 21

Time: 1 Minute

Instructions:

The slide lays a foundation for four vital elements to building effective collaboration. After a few moments of discussing each of these four elements, ask participants if they can think of any more.

Script:

“Let’s start thinking about what is needed to create an effective collaboration. We have listed four essential components of a great partnership on this slide. Why do you think these four are important? [Allow for discussion.] What other elements would you add?”



Slide: 22

Time: 2 Minutes

Source:

Leiken, S. & Kempner, R. (2010). The challenge of regionalism and the elements of regional collaboration. In Council on Competitiveness, *Collaborate. Leading Regional Innovation Clusters.* (pp. 56-60). Washington, D.C.: Council on Competitiveness, Retrieved from http://www.compete.org/images/uploads/File/PDF%20Files/Final_Collaborate.pdf

Instructions:

Quickly cover these four benefits. Ask the group if they can think of any more.

Script:

“Let’s take a quick look at some of the benefits of collaborating with others:

- **Shared resources** – Sharing resources increases the capacity of effort by reducing redundancy.
- **Expanded perspectives brought to work on issues/opportunities** – The old adage ‘two heads are better than one’ applies here. As more perspectives help shape the group’s planning, the direction becomes clearer.
- **Larger region creates potential for positive results for greater number of people** – This goes back to the idea of collaboration math ($1+1=3$). We can do more together than we can individually.
- **Greater number of partners expands the number of relationships that can be drawn upon for coordinated efforts**

Can you think of any others?”

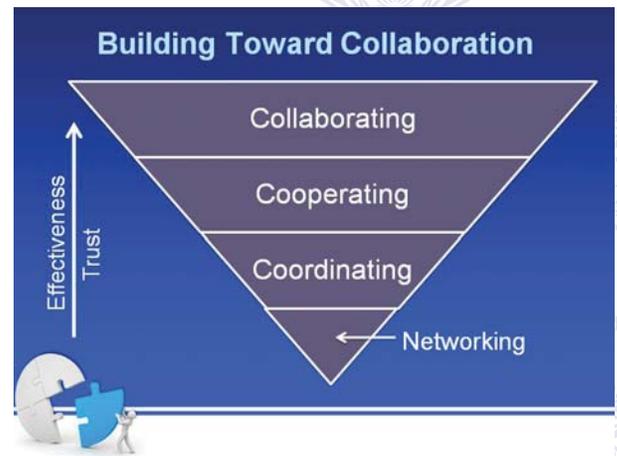


Slide: 23

Time: 2 Minutes

Instructions:

Collaboration is hard work. It can take years to build trust, exchange resources, and take deliberate steps to integrate functions and goals. Groups can interact on a number of different levels. As groups move toward collaboration, they also increase the amount of shared vision and resources. Each of these levels builds on the previous. Regional groups often start and stay at the networking phase. It's important to recognize where the SET group currently stands and work to take steps to master each stage.



Slide: 24

Time: 3 Minutes

Resource:

For additional information and research related to collaboration, look to the University of Wisconsin's Evaluating Collaboratives: Reaching the Potential at <http://learningstore.uwex.edu/Assets/pdfs/G3658-08.pdf>. This guide (especially pages 2-15) provides a concise discussion of the levels of collaboration.

Script:

“Collaboration is the aspiration of SET teams. It takes the hard work and deliberate effort of many people to achieve collaboration. This chart from the University of Wisconsin shows the different phases a group such as yours might decide to aspire to reach. Collaboration, in this case, represents the highest level of integration. This means organizations are all working toward the same thing AND have made resource commitments toward those goals. For some groups, building a communication network is the most important work at hand and for others, they're ready to move to something with greater commitments involved. It is key for your team to consider where you currently are, where you would like to be, and how you will get there. It's also important to think about the tactics you might use to improve at any level. What are your thoughts on this model? What experiences do you have at the different levels?”

[Allow time for some short group discussion about where the SET team is currently located on this chart.]

Instructions:

While partnering and collaborating with other individuals is important, it is not easy to accomplish. A number of barriers can hinder the work. This slide explores four common barriers. Provide a quick overview of each, then ask participants to discuss how these or other barriers may challenge the work in their region.

Script:

“It’s easy to understand why networking, coordinating, cooperating and collaborating with others can greatly expand the capabilities of your SET group. However, barriers frequently make building these relationships more difficult. Let’s take a look at some of them.

- **Governmental boundaries (city, county, state) or other ‘turf’ barriers:** Political boundaries can create challenges as well as spoken or unspoken “turf” barriers.
- **No ‘big’ view of benefits:** Gaining a regional perspective for use of local resources may be a challenging shift to make.
- **Control/trust issues:** Groups/individuals may want to control their own resources. Some may not trust others to make decisions in everyone’s best interest.
- **Old rivalries:** Past history can hinder future opportunities, especially if trust is compromised.”



Barriers to Collaboration

- Governmental or “turf” boundaries
- No “big” view of benefits
- Control & trust issues
- Old rivalries

Slide: 25

Time: 2 Minutes

Instructions:

Case Study: This is your opportunity to become a storyteller. The script below provides the storyline, but feel free to add details to make it more interesting. Draw participants into the situation so they can see that it really could happen. The purpose of this exercise is to challenge your group to think about the human capital needs in a regional economic development effort. The key points are that 1) groups of people need compelling common interests in order to work together; 2) participation in regional economic development efforts will fluctuate over time; 3) sustaining group leadership is an important element to constantly revisit. Whenever possible, use real world examples from your own experience to increase the applicability of this scenario.



Slide: 26

Time: 6 Minutes

Script:

“To apply some of the principles we have been discussing, let’s consider one fictional regional development group’s story.

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 number of regional leaders who had experience working together. Since the group had worked together, they were able to easily get a few projects started, leading to some amazing early wins. In just one year, the group received two federal grants, one to clean up a four-mile stretch of the river and the other to build a business incubation park in Horseshoe City, the largest city along the river. The clean-up grant is particularly important given that the river’s past history as a fantastic tourist destination has diminished in recent years because of pollution.

In spite of early wins, the group has lost momentum in recent months. The primary leader recently took a new position and moved from the region, leaving the others in the group to fill the void. A great deal of work is still to be done, but many of the original collaborative members have accomplished their initial goals, resulting in a decline in attendance. A few members continue to meet, but their frustration level is on the rise. At their most recent meeting, one group member asked, ‘Are we just meeting to meet?’

Script (Cont.):

In addition to the loss in momentum, the collaborative has been the subject of recent controversy. Several groups have questioned the priorities of the Horseshoe River Collaborative. One organization representing the northern portion of the river has publicly criticized the collaborative's past efforts, stating that the group needs to distribute efforts more evenly across the region rather than focusing just on the largest city. The critics want a business park developed in the northern part of the region to provide balance.



Slide: 26 continued

Time: 6 Minutes

Another group has questioned the limited scope of the collaboration. That group, called Friends of the River, represents hotel and recreation businesses in the southern portion of the river that are upset for not being invited to play a role in the collaborative.

Yet another group believes more should be done to support entrepreneurship in the region, but accuses the Horseshoe River Collaborative of only focusing support on the powerful existing businesses.

All the groups are confused about what participating in this effort involves. With these complaints surfacing, the collaborative realizes that it needs to make adjustments to make meaningful changes in the region.”

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, so don't spend too much time here.

Script:

“Here is a quick summary of the most important points from the story I just shared with you. These will be important in just a minute when I ask you to complete a short activity.” [Briefly highlight what is on the slide.]

Building a Strong Regional Team



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



Slide: 27

Time: 2 Minutes

Instructions:

This exercise will help participants think practically, purposely and strategically about how to ensure their group is successful. It requires the group to plan for the good times and for those times when things are not going so great.

Using the text from this slide, explain to the participants their challenge. Offer a very limited amount of assistance or additional details. If pressed for additional information, encourage the participants to use their own experiences to fill in the missing details. The participants will use Handout Four to complete the activity. Give participants a few minutes to think and write their answers, and then 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 on the leadership team for this collaborative. Most likely, they will have experienced a similar situation. Their experiences will be valuable. Ask for participants to share the highlights of their discussion. Keep track of the comments by writing them on a flip chart.

Take a few minutes to review the challenge presented in Handout Four. Encourage them to share what was frustrating about this activity. Be watchful of time, and limit storytelling so the activity does not become bogged down. 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 before moving on.

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. If not, you likely will someday. Let’s take a few minutes to delve deeper into this scenario. Please use Handout Four: The Horseshoe Collaborative to 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. [Allow time to work.]

Challenge

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



Slide: 28

Time: 25 Minutes

Handout Four:
The Horseshoe Collaborative

Script (Cont.):

Let's hear your thoughts on these challenges:

Who's willing to share their thoughts and ideas about the first challenge? [Take one story.]

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

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

Thanks for sharing all those great solutions to this challenge. Keep these in mind as we conclude our discussions today. Organizing an effective leadership team is no easy task. However, we will talk together about some strategies for accomplishing this important effort."

Challenge

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



Slide: 28 continued

Time: 25 Minutes

Handout Four:
The Horseshoe Collaborative

Instructions:

Now that various types of partnerships have been explored, have the group make practical application to their own work. Using the groups/individuals identified from Handout Two, have them consider potential barriers and benefits of including these new partners. Challenge them to consider how they will address potential barriers. Dividing the list among small groups is a good way to ensure that consideration is given to every potential partner. Allow about five minutes for the exercise followed by a quick debrief of the activity. Be sure that viable strategies are presented to address every barrier raised.

Script:

“Now that we’ve had a chance to think about various partnerships, let’s put this knowledge to work. Using the list of potential groups/individuals from Handout Two, think about the potential benefits and barriers to each one. Record these on the table on Handout Five. We will take a few minutes for your work, then discuss together. Be sure as you identify potential barriers that you also consider strategies for overcoming these concerns. [Depending on the size of the group and the length of the potential partners list, you may want to divide the group and potentials list into smaller segments so that each can be explored. Allow about five minutes for work.]

Let’s hear from your work together. [Allow groups/individuals to give responses. Make sure that viable strategies are presented to address every identified barrier.]

How did thinking through these barriers and benefits change your thinking about collaboration?” [Allow for discussion.]



Slide: 29

Time: 10 Minutes

Handout Five:
Collaboration

Instructions:

A great way to summarize Module Three is to highlight a 2010 report by the Council on Competitiveness that showcases the seven key habits that lead to a highly effective regional leadership team.

Script:

“As a summary to this session, I want to share the highlights of a 2010 article published by the Council of Competitiveness to showcase seven habits that promote highly effective regional leadership:

1. **Be proactive:** Anticipate needs, then create strategies and the means to address them.
2. **Begin with the end in mind:** While action depends on leadership, accomplishments depend on shared vision. 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:** Find the crossroads where institutions (education, financial), firms, political jurisdictions and public agencies intersect to foster collaboration and build synergy.
7. **Sharpen the saw:** Develop metrics tied to measurable goals. Develop future leadership that will be able to step up at some future point.

Which of these habits stands out most in your mind? Why?

As we close this session, think about how these habits can strengthen the group.”

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)

Slide: 30

Time: 5 Minutes

Source:

Leiken, S. & Kempner, R. (2010). The seven habits of highly effective regional leadership. In Council on Competitiveness, *Collaborate: Leading Regional Innovation Clusters*, (pp. 56-60). Washington D.C.: Council on Competitiveness, Retrieved from http://www.compete.org/images/uploads/File/PDF%20Files/Final_Collaborate.pdf
Modeled on Stephen Covey, *The Seven Habits of Highly Effective People* (New York: Fireside Press, 1990)

Instructions:

It is critical to allow time for the participants to reflect on today's session and 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 they consider valuable. Don't let people go on for too long.

Script:

“Think about what we have done today in Module Three. 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?”

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?



Slide: 31

Time: 5 Minutes

Instructions:

Discuss the next session with the participants.

Script:

“Let’s take a quick look at the items you’ll work on in the next session. As you can see, we’re going to talk about developing a regional vision and exploring some potential directions.”

Looking Ahead . . .

In Module Four, we will:

- Review the important attributes of a good vision statement
- Develop/refine your team’s vision statement
- Begin considering possible regional directions



Slide: 32

Time: 1 Minute

Instructions:

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

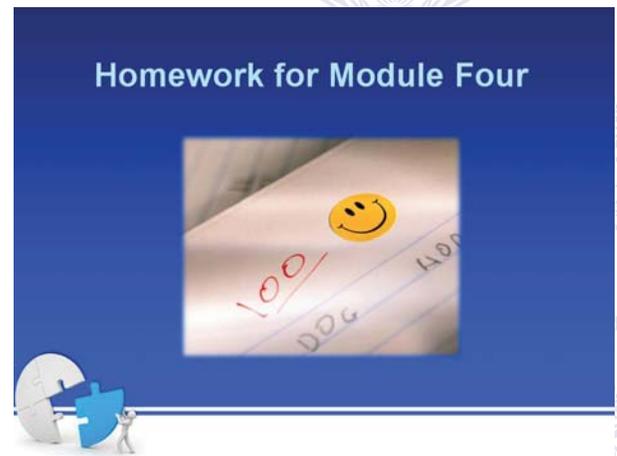
Script:

“Before the next session, I 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:

- Follow up with people or representatives of key groups you want to invite to be part of an expanded regional leadership team. Develop an appropriate call to action.
- 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 (if previous planning has been completed).
- Develop a position description for key roles within your regional team that can be later used to create the important succession plan.”



Slide: 33

Time: 5 Minutes



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