



# Stronger Economies Together

Doing Better Together

Preview

Lionel J. Beaulieu, Purdue Center for Regional Development, Purdue University  
Rachel C. Welborn, Southern Rural Development Center



This program has been funded through a cooperative agreement with USDA Rural Development

# PREVIEW SESSION: GETTING OFF TO A GREAT START

---

## OVERVIEW

Purpose: During this session, participants will:

- Gain a better understanding of the overarching purpose of SET
- Review the findings of the civic forum
- Explore preliminary regional economic data

Estimated Time to Complete: 4 hours

Materials Needed:

- Nametags
- Name tents
- Sign in sheets
- Flip charts
- Markers

Handouts:

- SET Overview
- High Quality Plan Guidance
- Data SnapShot, divided (Sections 1-4) (Section 5)
- Civic Forum Summary, produced from Civic Forum charts – the regional team should have one summary for each round of the forum
- SET Data Scavenger Hunt

**SLIDE 1**  
**INSTRUCTIONS**

---

Opening slide to have up when participants arrive



SLIDE #1

TIME: OPENING SLIDE, 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 2****INSTRUCTIONS**

Placeholder for making introductions. Particularly if this is a new regional group, time is needed to establish who is in the room and the county and sector (i.e. education, industry, government) that each person represents.



SLIDE #2

TIME: 1 MINUTE

SUPPLIES: NONE

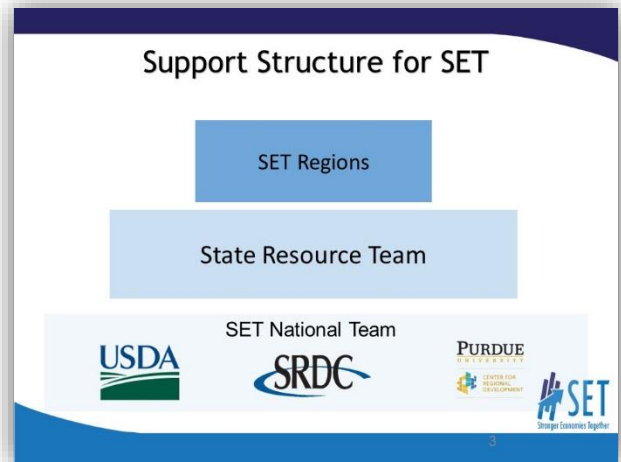
HANDOUTS: NONE

**SLIDE 3**  
**INSTRUCTIONS**

This simple graphic shows how regional teams will be supported to do their work.

Most directly, State Resource Teams will provide coaching and guidance.

The State Resource Team, in turn, is supported by the National Team consisting of USDA Rural Development at the federal level, the Southern Rural Development Center that is coordinating the work, and the Purdue Center for Regional Development that is providing leadership to the team and is also providing data analysis.



SLIDE #3

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE



**SLIDE 5**  
**INSTRUCTIONS**

This purpose statement is used throughout the SET process. Emphasis is given to the development of a High Quality Economic Development Plan.



SLIDE #5

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

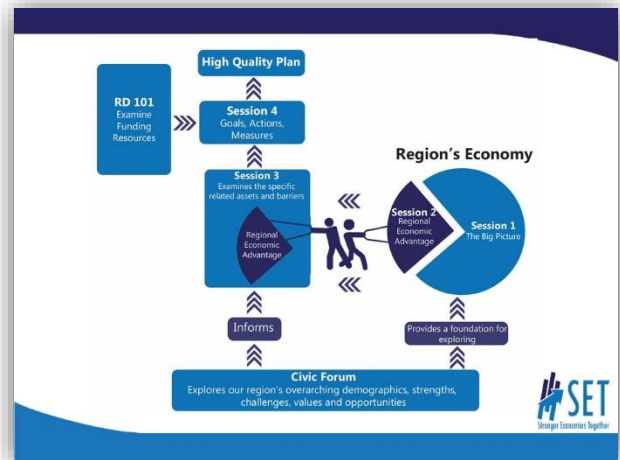
## SLIDE 6

### INSTRUCTIONS

Using the graphic on the slide, explain the SET process and how all the sessions will build together toward the High Quality Plan.

Key talking points:

- The Civic Forum provided a foundation from which the remaining sessions will build. The exploration of the region's demographics, strengths, challenges, values and opportunities are important initial steps to developing a regional plan.
- Session One will provide an overview of the region's economy, resulting in the identification of a few areas within the region's economy that warrant a deeper look.
- Session Two will explore those identified areas within the region's economy and result in identification of key regional economic advantages.
- Session Three will examine the assets and barriers unique to the region's economic advantage, drawing from the information gathered at the civic forum.
- Session Four will step through the final planning stages to develop goals, actions and measures.
- RD 101 will help identify potential funding sources to facilitate the region's work.



SLIDE #6

TIME: 5 MINUTES

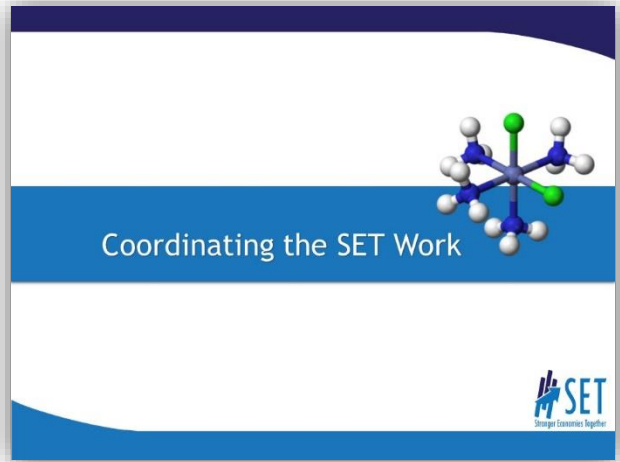
SUPPLIES: NONE

HANDOUTS: NONE



**SLIDE 7**  
**INSTRUCTIONS**

The next few slides will go over key points for coordinating the SET process.



SLIDE #7

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 8

## INSTRUCTIONS

**Learning from past regions, the structure on this slide seems to be a very good model. While each region is different, some thought should be given to how the group will function and communicate moving forward.**

In this model, four key elements are presented.

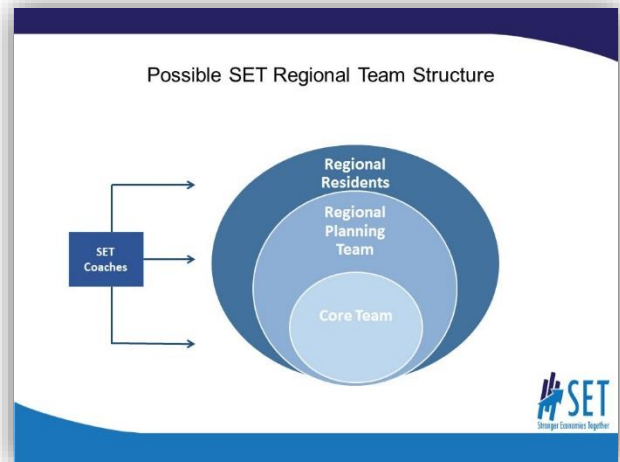
**Regional Planning Team:** one that has an active and representative group of individuals drawn from the target region. The size of this team will vary given the number of counties in the region. However, participation should include several members from each county and also a broad mix of perspectives. [This is discussed in more detail in a later slide.] These individuals are committed to attending and fully participating in all the planning sessions.

**Core Team:** Typically composed of at least one person from each county, this smaller team helps keep communication flowing and serves as connectors among the group as well as to key outside stakeholders as needed between sessions.

**Regional Residents:** While it is not feasible to involve everyone in the regions throughout every step in the planning process, the Civic Forum provides a great venue for making a first connection that can continue through regular communication to interested individuals and groups. The Planning Team makes a commitment to honor the voices of regional residents as gathered through the Forum.

**Regional Coach:** At least one Cooperative Extension Service coach and one USDA Rural Development coach will be guiding the process. These are individuals with the education and experience needed to guide the work of the SET Regional Team.

The next series of slides expands on the vital role that each of these entities plays in advancing the success of the SET regional team over the long-term.



SLIDE #8

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 9

### INSTRUCTIONS



SLIDE #9

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**This slide details some of the important tasks for the Planning team. Briefly discuss these items.**

**Participate in the SET team meetings:** It is hard for the team to make much progress on developing and implementing a sound regional plan if participation of SET team members is spotty. While it is not uncommon for some members to miss a meeting because of a work or family emergency, it's important to find a time for ALL planning team members to attend all meetings. If members start failing to attend, it's an early warning sign that something is just not right. In order to get the important regional work off the ground, regular attendance at meetings of the team is essential.

**Contribute personal and professional knowledge:** Each member of the Planning Team was selected because they bring a unique and valuable perspective to offer to the team. So, it's important for each person on the team to share his/her personal knowledge of the communities and counties that make up the SET region. Furthermore, the professional knowledge and expertise team members bring to the group can help guide and inform the overall work of the team.

**Identify local resources to support SET:** Each member of the team has developed important relationships with individuals, organizations and local institutions that can be tapped to support one or more components of the SET program. When appropriate, each member should be willing to help connect these resources and assets for the purpose of advancing the goals and strategies that the SET team has developed for the region..

**Plan the Civic Forum:** One of the first challenges the SET regional team will face is to coordinate and sponsor a Civic Forum in 1-2 places in the region. Hosting such an event – one that offers local residents an opportunity to share their hopes and aspirations for the region – requires a good bit of planning in order to ensure that the event is well attended and is conducted in an organized and effective manner. So, it is important that all members of the SET regional team play an active part in hosting a successful forum.

**Input on goals and strategies:** The SET program introduces the regional team to a variety of tools that it can use to gain some clarity regarding the opportunities and challenges existing in the region. These include in-depth data on the region, input from local residents taking part in the Civic Forum, and the mix of assets that exist in the region. Taken as a whole, these and other resources provide a foundation for determining what major goals the SET team will pursue. The decision on what goals should be given priority attention is driven by the SET regional team. That means that all members of the team have to weigh in and offer their views of what goals and strategies should be considered for inclusion in a regional economic development plan and offer a sound explanation as to why.

**Finalizing goals and developing action plans:** After discussion of the goals and strategies, the team has to come to an agreement on what goals it will embrace as part of the regional plan and how it's going to get the job done in terms of achieving those goals. It's incumbent that each team member be willing to step and volunteer to fine tune the plans associated with the priority goals and to actively participate in putting the team's plan into action.

**Keep counties informed:** By design, SET team members are drawn from the counties that have agreed to form the SET Regional Team. As such, it is essential that each team member serve as a conduit for keeping his/her county leaders informed of the work of the SET team. By taking steps to keep local leaders in the loop, the likelihood of garnering their support for the regional plan the SET team develops is likely to be much stronger.

## SLIDE 10

### INSTRUCTIONS

**Discuss whether the team has the right mix of participants. Are there any key sectors missing? If so, how could the team recruit representation? While this chart is a representative of the types of groups and organizations that make up a well- rounded SET team, this is by no means exclusive. Each region should consider the question of “who is missing” from their own perspectives.**

Using a flip chart page, generate a list of missing sectors that the group wants to be sure to include. Then ask planning member who they know that represents that sector. Write those names beside each sector. Finally, ask for volunteers to reach out to the individuals listed. Add these names to the chart.



SLIDE #10

TIME: 1 MINUTE

SUPPLIES: FLIP CHARTS AND MARKERS

HANDOUTS: NONE

## SLIDE 11

### INSTRUCTIONS

Responsibilities of the Core Committee. Briefly discuss these key roles.

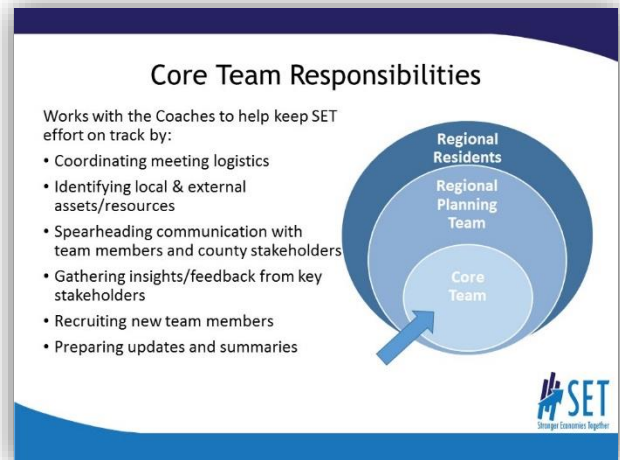
**Meeting logistics:** Coordinate the dates, times and location of the regular SET team meetings and handle the preparatory work for the team's hosting of the Civic Forum.

**Local and External Assets/Resources:** Coordinate the work of the SET regional team when it comes to tapping the local and external resources needed to enhance both the work of the team and its capacity to achieve the regional goals.

**Communications:** Work with the regional coach to keep all members in the loop regarding upcoming meetings and provides the necessary documents team members need to be well prepared to be an active contributor to the upcoming meetings of the regional group.

**High Quality Plan:** It is difficult for any regional plan to be written by a large committee. More often than not, a smaller team of committee members will be charged with the responsibility of putting a strong regional plan together after the entire SET regional team has weighed in. The Core Team can serve in this role, or the full membership of the regional team may opt to create a sub-committee to draft an initial draft of the plan.

**Prepare/Submit Reports:** Given that SET has been funded by USDA Rural Development, it is important for the Core Team to offer feedback to the State Resource Team on how well the SET program is going in the region... In addition, the Core Team is urged to partner with the Regional Coach to prepare and submit all reports needed to track the progress and success of the SET program in the region.



SLIDE #11

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 12

### INSTRUCTIONS

Briefly discuss these roles of the regional coach. The Regional Coach functions as a critical link between the SET Regional Planning Team and the State Resource Team. The coach offers an objective assessment of the work of the team and tries to ensure that the work for the team stays on track. While the major responsibilities of the coach are noted in the slide, the following points offer additional insights regarding the activities of the coach:

- The coach works with both the Core and Planning Team members, but is likely to interact more frequently with the Core Team as a way to make sure that the work of the planning team is progressing at a good pace.

- If the Planning Team does not have a good mix of local residents involved in the SET program, the coach will express this concern to the team and will urge that additional people be added to the team in order to broaden team representation.

- Aside from the Civic Forum, the coach recommends that the public be asked to offer feedback to the Planning Team at various times as it continues to work on developing and putting the finishing touches on a high quality economic development plan.

- As the team establishes its regional goals and action plans, the coach may ask some challenging questions to make sure the team has given consideration to the benefits and costs associated with the goals and strategies selected.

- Finally, as the team achieves consensus on its regional plan, the coach will help the team assess how well its plan incorporates the essential elements of a high quality plan.



SLIDE #12

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

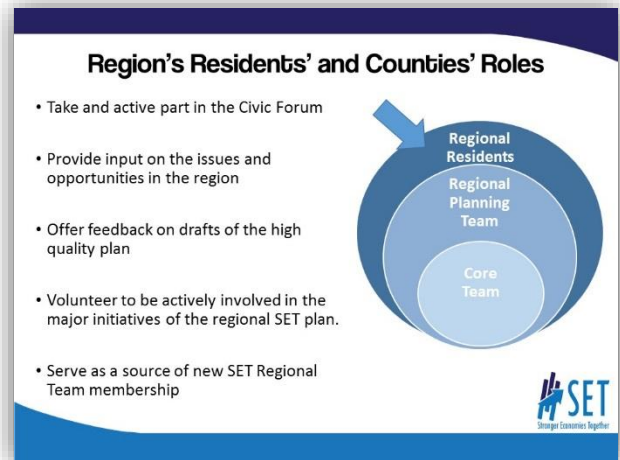
## SLIDE 13

### INSTRUCTIONS

Note the importance of inviting the public to weigh in on the activities of the Regional Team.

The SET program takes seriously the need to invite residents in the region to offer input and feedback on regional needs and opportunities. A new component of the SET program introduced in Phase V is the hosting of a Civic Forum by the Regional Planning Team. The success of the forum depends, in part, on the willingness of the public to attend and share their perspectives on the strengths and challenges existing in the region. As one of the first significant activities conducted by the Regional Planning Team, the input provided by local residents during the course of the Civic Forum serves as one of the important pieces of information that the Planning Team will study as it formulates a regional economic development plan.

But, the public's involvement should not be limited to its participation in the Civic Forum. Residents in the region should be invited to share their opinions at various times during the Planning Team's deliberations. This includes offering feedback on some of the initial drafts of the regional plan and stepping up to help implement some of the activities included in the plan. If some members of the SET Planning Team rotate off the team, local residents with an active interest in being part of the Regional Team should submit their name for consideration as a new member of the team.



SLIDE #13

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 14**  
**INSTRUCTIONS**

This slide makes a transition for planning for the civic forum, which is the team's next task.

Briefly explain what a civic forum is: a process by which community members from all walks of life help shape the course of the planning process.

Some may not understand the value of the forum. The next slide guides a brief discussion on the topic.



SLIDE #14

TIME: 1 MINUTE

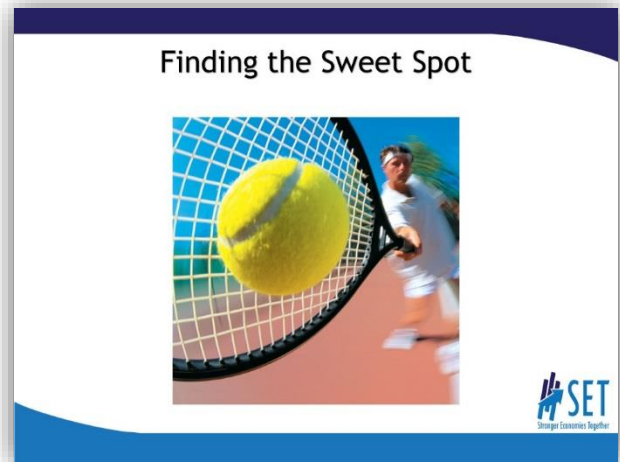
SUPPLIES: NONE

HANDOUTS: NONE



**SLIDE 15**  
**INSTRUCTIONS**

On a tennis racket is a place called the “sweet spot”. It is the place on the racket where the player can hit the ball to get the most energy with the least amount of effort. Communities have the same kind of sweet spot.



SLIDE #15

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

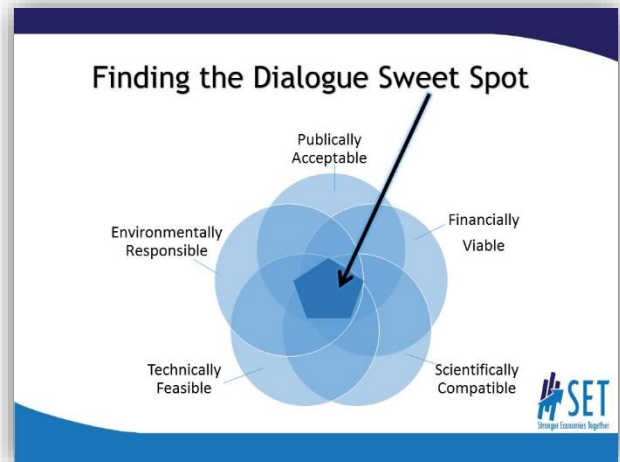
## SLIDE 16

## INSTRUCTIONS

Explain the sweet spot concept depicted in the diagram above. Note that communities have a variety of interlaced components, all of which matter and help to shape the choices within a community. But like the tennis racket, there is a “sweet spot” that helps maximize power and minimize effort through combined resources and support. Some of these interacting forces include:

- What is environmentally responsible – does not destroy the natural resources available to a community
- Technically feasible – actually can be done, from a technical standpoint
- Scientifically compatible – considers the data and scientific input of the situation
- Financially viable – stays within the confines of what the community can afford
- Publicly acceptable – honors the values, concerns, and interests of the people that live within the community.

Often planning considers a few of these circles, but may disregard others. The “sweet spot” though, looks for the overlap of what works for each of these components together. That interconnection of interests gives the community the most power to move the initiative toward success.



SLIDE #16

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 17

### INSTRUCTIONS

During the next few minutes, participants need to develop a list of people and groups to invite to the civic forum. Below (and represented on the slide) are a few ideas to get them started. However, the point is to invite as many people from as diverse a perspective as possible to ensure that plans moving forward are very reflective of the community.

Suggested invitation list includes (but not limited to):

- Industry and financial leaders
- Representatives of faith-based organizations
- Entrepreneurs/small business leaders
- County Extension Service personnel
- State and federal Congressional representatives or staff
- Local and regional government representatives
- Minority and women-owned business owners
- Chamber of Commerce, economic development, and/or tourism organizations
- Workforce Development Board representatives from the area
- Educational leaders and organizations
- Nonprofit, voluntary and civic-minded organizations
- Community foundations
- Rural cooperatives

Consider, too, how to reach multi-generations, different ethnic and racial groups, varying socio-economic sectors.

Using a flipchart page, generate a list of people, organizations, groups that need to receive an invitation.



SLIDE #17

TIME: 15 MINUTES

SUPPLIES: FLIP CHART AND MARKERS

HANDOUTS: NONE

## SLIDE 18

### INSTRUCTIONS

Using the list just generated, form an invitation strategy. A few guiding thoughts are on the screen. Ultimately, the team needs to determine exactly how to reach out to each of the groups/individuals identified. For each listing, have the group consider the best way to reach that person/group, keeping in mind that no one strategy will work for all groups. For example, while a newspaper advertisement may be a great strategy to reach some sectors of the community, chances are very high that it will not reach them all. Likewise, social media might get attention for some, while others are not engaged. And keep in mind that face-to-face invitations are always better than broad stroke approaches. So encourage the group to consider the right strategies for each group.

Once the strategies are identified, recruit individuals to take ownership of each strategy, whether these are one-on-one contacts (visits, phone calls, etc.) or broad approaches such as posting in the newspaper or social media. Get commitments to cover all aspects.

**How to Invite**

- Specific individuals to invite
- Getting the word out to a broader audience
- Using media and social media

**One Size DOES NOT fit All**

SET  
Stronger Economies Together

SLIDE #18

TIME: 10 MINUTES

SUPPLIES: FLIP CHART LIST FROM PREVIOUS SLIDE AND MARKER TO RECORD COMMITMENTS

HANDOUTS: NONE

## SLIDE 19

### INSTRUCTIONS

Discuss these key questions around the civic forum. Consider the guiding questions below. Refer to civic forum preparation instructions in the coaches' guide for the details of these questions, but ensure the local participants take ownership of the steps below and others they may identify.

Where should we host the forum?

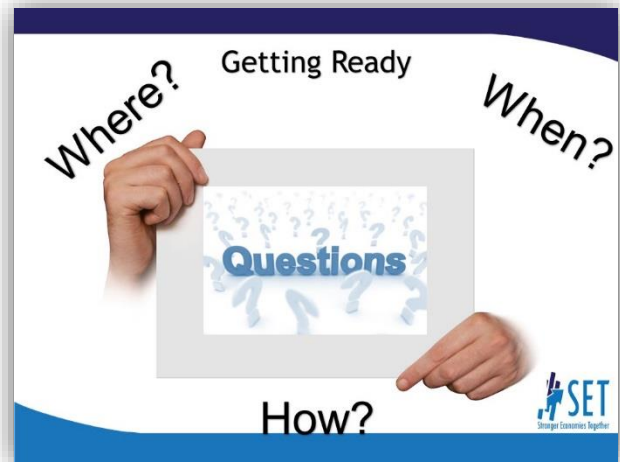
- Where are people comfortable meeting?
- Where can we set up round tables for 6-10 people each?
- Where can people get to easily?
- Who will take responsibility for securing the location?

When should we host the forum?

- When during a normal week are people most likely to come considering your invitation list?  
Work day? Evenings?  
Weekends?
- When are there big events in the community that might compete for attendance?

How do we prepare for the forum?

- Who can manage registration?
- Who can manage sign-ins?
- Who can take responsibility for gathering the notes from the forum and typing them (they will be on flip charts)
- Who can provide a welcome?



SLIDE #19

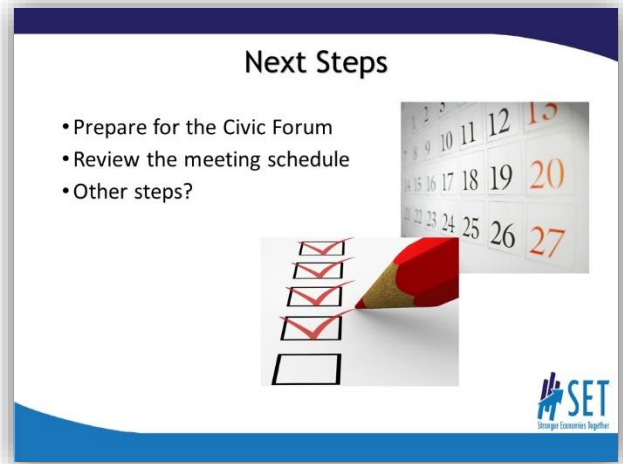
TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 20**  
**INSTRUCTIONS**

This slide provides an overview of next steps. Make sure the group is clear on the next meeting date/time.



SLIDE #20

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 21**  
**INSTRUCTIONS**

---

Be sure to insert your coaching team contact information.



SLIDE #21

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE