SET COACHES' GUIDE

SESSION 1

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

SESSION 1:
SET OVERVIEW AND EXPLORATION OF REGIONAL DATA

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
- Regional Data SnapShot: Session 1
- Regional Cluster Dashboard– *printed on legal size paper*
- Regional Data SnapShot: Civic Forum, a few copies to share and as reference as needed
- Civic Forum Summary, produced from Civic Forum charts – the regional team should develop this summary prior to Session 1
- SET Data Scavenger Hunt
- Session Evaluation

Resources:

- Frequently Asked Questions
- Cluster Taxonomy (on website)
- Best Practices & Cool Ideas
- Preparing for Session 2 – Innovation from the field – Virginia coaching team
- Civic Forum Summary – Innovation from the field – Virginia coaching team
- SET Plan Template (on website)

Session 1: Best Practices and Cool Ideas

Overarching Ideas:

- Stay in touch in between sessions
- At the beginning of each session, explain what will be covered and how it relates to the overall planning process
- Set dates and communicate these well in advance. Some regions set dates for all the sessions at the very start and even include a few catch up dates or bad weather dates
- Have a facilitator who is 100% fluent on the data
- Integrate the involvement of core team and the writing team early

Participants:

- Involve business representatives from the targeted industries to find out their needs. This is especially important in Session 2 once the industries have been selected in Session 1.
- Emphasize the importance to all members attending all sessions or send a representative.
- Ensure that each county in the region is well represented.
- Inviting all local elected/board leaders for inclusion in the discussion. Involve key decision makers.
- Involve young people - invitation for juniors and seniors in high school, college students

Managing the Time:

- Review the civic forum efficiently, but do not rehash. Consider having a written summary to share. This can also serve as a segment of the final plan.
- Introducing the High Quality Plan components is important, but should not take an extensive amount of time.
- If your team is large, consider using a quick method for introductions. One approach is to ask people to state just their names, organization, then give people a quick question asking for a one word response. Such as: What one word describes what you hope will come from the SET process? Model the behavior to show how quickly you want it to go.
- Provide clear directions of tasks/objectives then stay on task. Keep activities on time. Allow adequate time for discussions, but keep them focused. Walk around and listen to discussions so you know if people are sidetracked and/or finished and ready to move on.
- If you are having a meal, consider having some of the presentation going while people eat to preserve time.

Process:

- Send information ahead of time for people to preview.
- Provide full size color handouts for everyone. Number handouts and refer to these to help participants find them. Organize handouts to match sequence of presentation. Make sure handouts and PowerPoints match (include all the same charts)
- Ensure that the decision process is inclusive and balanced (3):
    - Ensure that voices from larger counties are balanced with smaller ones
    - Have all the tables vote or even individuals vote on the major categories to be requested
    - Debrief decision points asking if this seems to reflect the region's views.
- Effective use of Scavenger Hunt - Some possible ideas:
    - Set parameters – such as only include businesses with (some number) minimum employment. (Some regions were trying to list every "mom and pop" establishment on Main Street.)
    - Brainstorm a list first, then divide the list among small groups to fill in the blanks.
    - Link this activity better at the end by taking one of the real businesses identified and talking about what industry cluster(s) it supports and what kinds of materials it may purchase inside the region and what might be purchased outside the region (preview of clusters and leakages).

Data:

- Be well prepared as a coaching team. Consider one or both of these approaches on strong teams:
    - Hold a practice session with just the coaching team to ensure that you all have at least a strong working knowledge of the data and the resulting activities so you can all support the lead data presenter and assist with small group work.
    - Preview the data with the core team so you can surface questions regarding the picture the data presents compared to local knowledge. Do this in advance of the sessions so that the lead data coach has time to send questions to Purdue and/or research themselves. This also allows time for the regions to gather existing data that may help inform the process.
- Be familiar with the data guide that describes definitions of terms and data sources.
- Have at least one copy of the breakdown of the various industry clusters to help guide questions of what is included. Note: It is a somewhat large document, but worth having on hand. Consider printing out additional copies of the list for the top 3-5 clusters to help groups see how these are defined.
- Keep the data in perspective. Help the region stay focused on trends, signs, magnitudes, changers over time, etc. rather than hand wringing over whether the data is precise.

Other great resources

- Free software (Economic Profile System) provided online by Headwaters Economics. Can create county profiles. http://headwaterseconomics.org/

SLIDE 1

INSTRUCTIONS

Have this slide up when participants arrive.

Goal: Begin the process of building rapport among the group members.

The participants may not know each other so taking time to facilitate introductions will be important. Feel free to use whatever process you prefer. Here are some suggested approaches to consider:

Ask individuals to introduce themselves to people around them in small groups, then have a spokesperson introduce everyone in the group simply providing name and organization.

Allow time for everyone to introduce him/herself to the full group (name & county).

Important note: If the group is very large, introductions need to be managed well to avoid too much time loss. Consider using a model like: Give your name, organization and one word that describes what you hope SET will do. [Model the behavior so people will see that you want it short.]

SLIDE #1

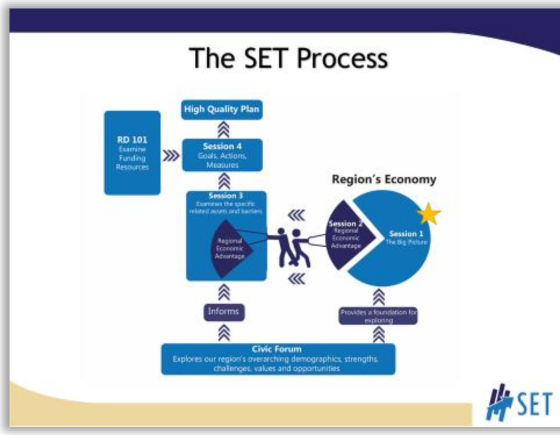
TIME: OPENING SLIDE, 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 2

INSTRUCTIONS



Goal: To explain the SET process

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. 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 the identification of key regional economic advantages.
- Session Three will examine the assets and barriers associated with the region's economic advantages or strengths, 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 #2

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

Stronger Economies Together

SLIDE 3

INSTRUCTIONS

Goal: Define the purpose of the session

Provide a quick overview to the group on today's discussion.

- Review the civic forum for those that were unable to attend and as a refresher for those that did.
- Remind the group that the data should be used to validate why an industry cluster/focus area is being proposed for the region's high-quality plan.
- Ask if anything else should be added to the agenda. If so, place the item on the chart and address it at the appropriate time.

Facilitator Note: You must have a data presenter who understands the report and the source of the numbers. The participants expect and want an explanation.

SLIDE #3

TIME: 3 MINUTES

SUPPLIES: FLIP CHART AND MARKERS

HANDOUTS: SET OVERVIEW (HANDOUT 1)

SET Stronger Economies Together

SLIDE 4

INSTRUCTIONS

Goal: Provide a brief overview of the SET goals and process.

Communities face major challenges when it comes to creating or expanding local job opportunities, especially if these places have small populations or limited economic activities.

SET is designed to encourage counties (parishes) and communities to join hands and begin carving out a sound regional economic development plan, one that builds on the region's economic assets and strengths.

The process is designed to support collaboration among the stakeholders for the purpose of finding the distinct advantages they have as a region and to design economic activities that will position the region to effectively compete in multi-state, national and/or international markets.

Facilitator Note: Be brief. They are really not listening now. This discussion must be held with the regional leadership team.

SLIDE #4

TIME: 2 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 5

INSTRUCTIONS

SLIDE #5

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS:
PRODUCING A HIGH QUALITY PLAN
(HANDOUT 2)

Goal: Set the expectation of writing a High Quality Plan and establish expectation that the group will have responsibility of writing the plan with a segment of that plan being developed at each session.

If a writing team has been identified, let the group know who its members are. If not, this should be done by the end of this session as writing tasks begin today.

This slide introduces the basic components of a high quality plan. Review these with participants and answer questions as needed. The Producing a High Quality Plan handout provides additional detail.

- Evidence-based: The plan builds on the region's economic strengths – including its current and emerging economic clusters (if any), a clear understanding of the demographics of the region, and other relevant assets.
- Practical: The plan is logical and clear, has a well-developed timeline, indicates who is responsible for carrying out the various components of the plan, and indicates outcomes to be achieved over the short, medium, and long-term basis. Additionally, the plan is focused on a manageable set of realistic goals.
- Broadly Supported: Having support of a wide range of people, governments, and community-based organizations is essential for the plan. Not only is it important to have a plan that is supported by economic development and local government leaders, but also one that has buy-in from people representing the region's education, health, business, faith-based, and nonprofit sectors, as well as key demographic groups.
- Focused on Regional Economic Development: The central focus of the plan must be on strategies that directly or indirectly advance regional economic development. That is, the economic development blueprint must be designed to benefit the economy of the whole region rather than a single community, county or sub-area of the region.
- Aligned with the Region's Goals: The plan must be connected and consistent with the regional goals the team has developed.
- **Facilitator Note:** Remind the group that a region needs a writing team. If the team has been identified, introduce the members. If not, discuss with the regional leadership team how the team will be established. Writing should begin now.

SLIDE 6

INSTRUCTIONS

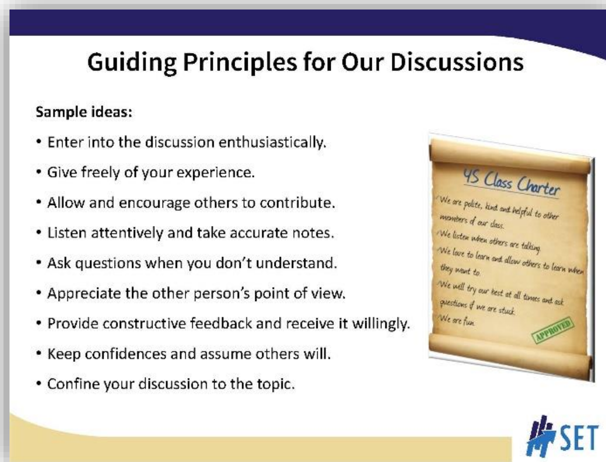
Goal: to create a "Charter of Expectations"

The sessions moving forward will take on a different "feel" from the civic forum. These working/planning meetings will require a different style of interaction.

Ask the group what guidelines they would like to use working together. What would be the Guiding Principles? Expectations of the participants? Expectations of the Coaches? Here are a few sample ideas:

- Enter into the discussion enthusiastically.
- Give freely of your experience.
- Allow and encourage others to contribute.
- Listen attentively and take accurate notes.
- Ask questions when you don't understand.
- Appreciate the other person's point of view.
- Provide constructive feedback and receive it willingly.
- Keep confidences and assume others will.
- Confine your discussion to the topic.

Capture responses on a flip chart that will then be displayed at each session. [Note: it may also be helpful to print the final list on table tents to display during subsequent meetings.]
One option may be to begin with a list (such as above) and asking the group which of the listed items would they like to keep, change, delete, or add. It makes this very important process a little bit faster. But, if a group needs time to build rapport and establish a stronger foundation of trust, take the time now to discuss how this group wants to work together.



SLIDE #6

TIME: 10 MINUTES

SUPPLIES: FLIP CHART AND MARKERS

HANDOUTS: NONE

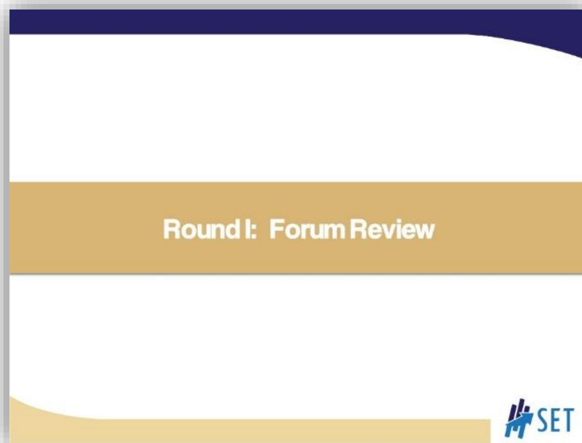
Resource:
For additional information and research related to collaboration, look to the University of Wisconsin's *Evaluating Collaboratives: Reaching the Potential* at http://learningstore.uwex.edu/Assets/pdfs/G3658-08.pdf. This guide (especially pages 2-15) provides a concise discussion of the levels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

SLIDE 7

INSTRUCTIONS

Goal: To begin discussion of the Civic Engagement Forum results.

This slide serves as a topic header for the upcoming review of the Civic Forum results. If participants in the room did not attend the forum, be prepared to provide a brief overview of the session.



SLIDE #7

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 8

INSTRUCTIONS

SLIDE #8

TIME: 15 MINUTES

SUPPLIES: FLIP CHART AND MARKERS

HANDOUTS: DATA SNAPSHOT (HANDOUT 3)
CIVIC FORUM SUMMARY (HANDOUT 4)

Goal: To review the findings from the Civic Forum
On each table, provide at least one copy of the Data SnapShot that was used in the forum.
Provide copies of the civic forum summary that includes:

- Round 1: Summary of regional strengths with top strengths noted
- Round 2: Summary of regional challenges with top challenges noted
- Round 3: Strengths and challenges from the Data SnapShot discussion (prioritized by number of times items were mentioned)
- Round 4: Opportunities along with potential linkages to strengths and challenges with notations of what participants thought could and should be done (prioritized by number of times items were mentioned and/or grouped by topic)

If possible, post the flip charts created during that session.

Lead the full group through a review of the summaries of each round. Allow time for clarification of each round. Once the summary is complete, ask participants to consider any personal reflections such as:

- What themes seem to be emerging from the overall discussion?
- Any other observations or clarifications to be considered?

[Note that more in depth discussions of the economic data will be coming up shortly, but that the demographic data forms a region's foundation.]

Facilitator Note:
Be sensitive to time. Those who did not attend the Civic Forum will want to "repeat" the entire process during Session 1 while those that attended will be ready to move on to the data review. You will have to manage these expectations. If this discussion takes too much time, the participants will be frustrated.

Facilitator Note, continued:
Consider using discussions in the small groups and ask those who participated in the civic forum to lead the table discussion. Then post any new thoughts to the charts. Those additions will be added to the lists and printed as part of the Session 1 summary.

Another option would be to post summaries of each round on flipcharts and have them stationed around the room as people come in. Ask a regional participant that attended the forum to stand at each station and invite participants to visit each station as they are coming in. This can also be a good way of managing late-comers.

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SLIDE 9

INSTRUCTIONS

Goal: To prepare for transition into new data.

During the next round, participants will examine economic data related to the regions, building on the foundational work of the forum.

Explain that Civic Forum explored the population characteristics and other demographic elements which serves as the economic foundation. This next session will explore more of the workforce and industry data to determine specific strengths and challenges in that area.

NOTE: There are **two possible approaches** to introducing this section, both with the same intended purposes – to help the region begin to think about what they know about their economic drivers and to help them begin to relate local information with the data analysis that will follow.

CHOOSE ONE of these activities. Both slides are included along with the explanations. Remove the slide for the activity that you do not want to use.

SLIDE #9

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 10

INSTRUCTIONS

Option One – Data Scavenger Hunt

Goal: Have the group think about the region before they look at the economic data.

Have the group brainstorm a list of businesses or industries in the region with 100 or more employees (adjust this number if needed to fit the region – the point being to focus on the larger businesses in the region).

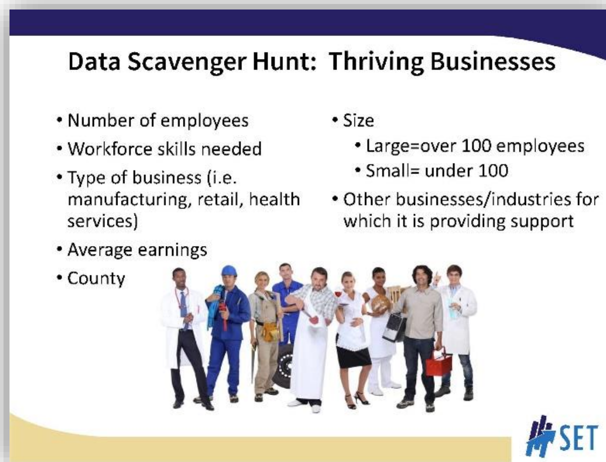
Divide the group into teams and divide the list of businesses among the teams. Have each group complete the SET Data Scavenger Hunt handout for the businesses assigned to them. [Alternately, they can post the information to a flipchart page so all can review the results].

Keep the group committed to the time limit for this activity. This is not intended to be a detailed analysis; rather it provides a starting point of local knowledge and prepares them for upcoming discussions:

- Estimating the number of employees gets them ready to talk about the Establishments data.
- Putting the businesses into "types" gets them ready to talk about the NAICS codes.

Debrief with the full group by asking:

- Industries they think are the largest in the region
- Industries they think have seen the greatest increase in jobs in the region
- Industries they think have seen the greatest loss in jobs in the region



SLIDE #10

TIME: 20 MINUTES

SUPPLIES: FLIP CHART AND MARKERS

HANDOUTS: SET DATA SCAVENGER HUNT (HANDOUT 5)

Facilitator Note: This discussion should set the stage for the data discussion. You may want to schedule a break before that begins and distribute the data packets.

SLIDE 11

INSTRUCTIONS

Option Two: Business/Industry Mapping

Goal: Have the group think about the region before they look at the economic data.

Have the group brainstorm a list of businesses or industries in the region with 100 or more employees (adjust this number if needed to fit the region – the point being to focus on the larger businesses in the region). Ideally, you want to have about 5-10 listed depending on the size of your group. Decide on the number to map based on the size of the group. Make sure that at least t people are in each group working on a business.

Divide the group into teams and divide the list of businesses among the teams. Have each group map the business using a mind map technique.

- Place the business name in the cent of a flip chart.
- Place the goods and services purchased moving out from the center business.
- Put a star beside goods/services available locally
- On the edges, add names of other regional businesses that connect to this one – draw an arrow between the two and add descriptions of the connections such as "purchases from," "competes with," "trains workforce for", etc.
- Finally, look at all the maps – do any of them connect in any way?

SLIDE #11

TIME: 20 MINUTES

SUPPLIES: FLIP CHARTS, MARKERS

HANDOUTS: NONE

Keep the group committed to the time limit for this activity. This is not intended to be a detailed analysis; rather it provides a starting point of local knowledge and prepares them for upcoming discussions:

- Thinking about goods and services available in the region gets the group thinking about leakages
- Linking businesses together gets the group thinking about clusters.

Debrief with the full group by asking if they had any surprises or insights in this quick look?

Transition: The data exploration in the next section will provide more food for thought as we begin to gain a clearer understanding of our region's economy.

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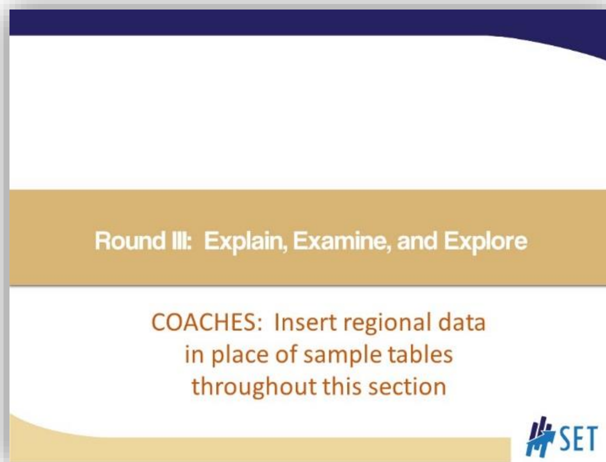
SLIDE 12

INSTRUCTIONS

Goal: To begin the discussion on economic data

Provide Industry Cluster Definitions as an explanation of terms.



SLIDE #12

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: INDUSTRY DATA KEY DEFINITIONS (HANDOUT 6)
REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 13

INSTRUCTIONS

Goal: To begin the discussion on economic data

This is simply a separator slide for the data segments.

SLIDE #13

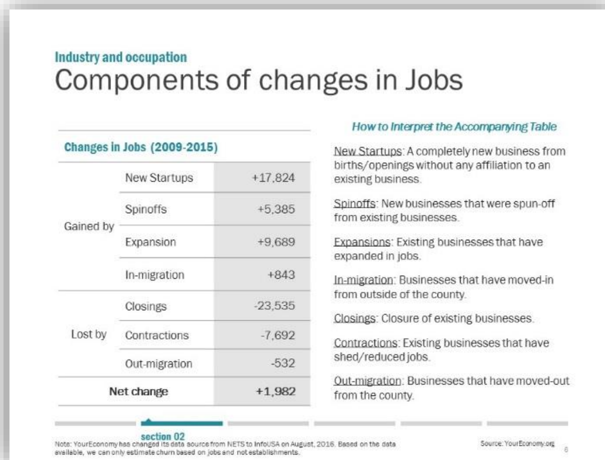
TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: INDUSTRY DATA KEY DEFINITIONS (HANDOUT 6)
REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 14

INSTRUCTIONS



Goal: To examine establishments by number of jobs.

This slide helps regional team members begin to grasp the breadth of economic impact the various stages of businesses have within the region.

Questions to discuss (I brought these over from a slide that was deleted.)

- What establishments are the most numerous based on company stages?
- What stages have experienced the largest growth? The greatest decline?
- What company stage employs the largest number of people?

SLIDE #14

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

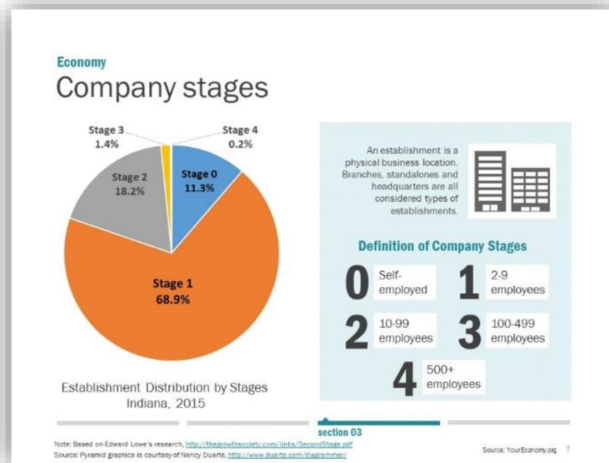
SLIDE 15

INSTRUCTIONS

Goal: To introduce a discussion on establishments in the region

This initial chart looks at the overall number of establishments that launched, closed, or moved from the region as a way of beginning to gauge regional growth.

NOTE: An ***establishment*** is a physical business location. Branches, standalones and headquarters are all considered types of establishments.



SLIDE #15

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 16

INSTRUCTIONS

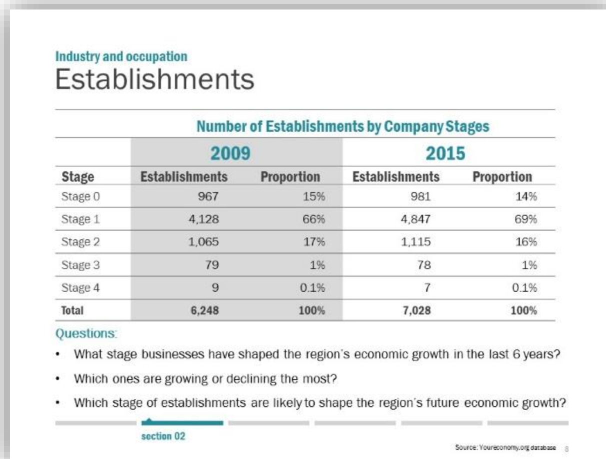
Goal: To examine the sizes of businesses in the region.

Ask small groups to identify

- The stage(s) of the regional industries
- The industries that have driven the regional economy over the past 10 years.

Guiding questions:

- What stage businesses have shaped the region's economic growth in the last 6 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?



	2009		2015	
Stage	Establishments	Proportion	Establishments	Proportion
Stage 0	967	15%	981	14%
Stage 1	4,128	66%	4,847	69%
Stage 2	1,065	17%	1,115	16%
Stage 3	79	1%	78	1%
Stage 4	9	0.1%	7	0.1%
Total	6,248	100%	7,028	100%

SLIDE #16

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 17

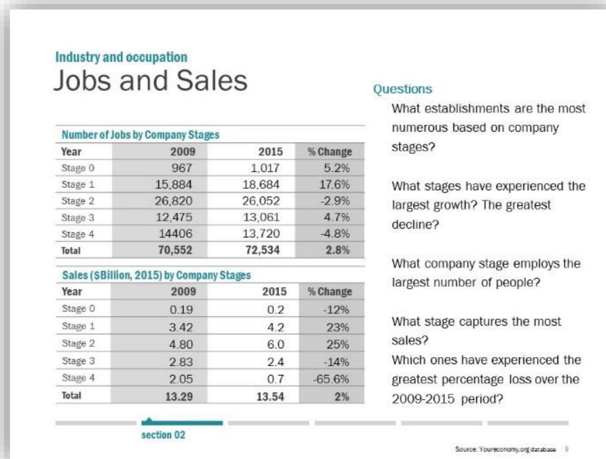
INSTRUCTIONS

Goal: To examine establishments by number of jobs and sales.

This slide helps regional team members begin to grasp the breadth of economic impact the various stages of businesses have within the region.

Guiding Questions:

- What establishments are the most numerous based on company stages?
- What stages have experienced the largest growth? The greatest decline?
- What company stage employs the largest number of people?
- What stage captures the most sales?
- Which ones have experienced the greatest percentage loss over the 2009-2015 period?



SLIDE #17

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 18

INSTRUCTIONS

Goal: To examine economic data

Use the inventory created with ***Handout 1*** as a starting point. However, the questions on the slide may spur additions to the lists of businesses.

Additional notes on NAICS Codes:
The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

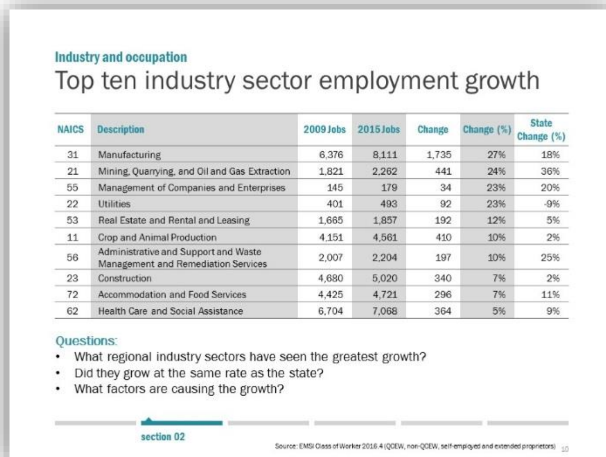
NAICS was developed under the auspices of the Office of Management and Budget (OMB), and adopted in 1997 to replace the Standard Industrial Classification (SIC) system. It was developed jointly by the U.S. Economic Classification Policy Committee (ECPC), Statistics Canada, and Mexico's Instituto Nacional de Estadistica y Geografia, to allow for a high level of comparability in business statistics among the North American countries.

This official U.S. Government Web site provides the latest information on plans for NAICS revisions, as well as access to various NAICS reference files and tools.

The official 2012 U.S. NAICS Manual includes definitions for each industry, background information, tables showing changes between 2007 and 2012, and a comprehensive index. The official 2012 U.S. NAICS Manual is available in print and on CD-ROM from the National Technical Information Service (NTIS) at (800) 553-6847 or (703) 605-6000, or through the NTIS Web site. Previous versions of the NAICS Manual are available.

Additional information on the background and development of NAICS is available in the History section of this Web site.

Source: http://www.census.gov/eos/www/naics/



Industry and occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2015 Jobs	Change	Change (%)	State Change (%)
31	Manufacturing	6,376	8,111	1,735	27%	18%
21	Mining, Quarrying, and Oil and Gas Extraction	1,821	2,262	441	24%	36%
55	Management of Companies and Enterprises	145	179	34	23%	20%
22	Utilities	401	493	92	23%	-9%
53	Real Estate and Rental and Leasing	1,665	1,857	192	12%	5%
11	Crop and Animal Production	4,151	4,561	410	10%	2%
56	Administrative and Support and Waste Management and Remediation Services	2,007	2,204	197	10%	25%
23	Construction	4,680	5,020	340	7%	2%
72	Accommodation and Food Services	4,425	4,721	296	7%	11%
62	Health Care and Social Assistance	6,704	7,068	364	5%	9%

Questions:
- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors) 10

SLIDE #18

TIME: 10 MINUTES

SUPPLIES: NONE

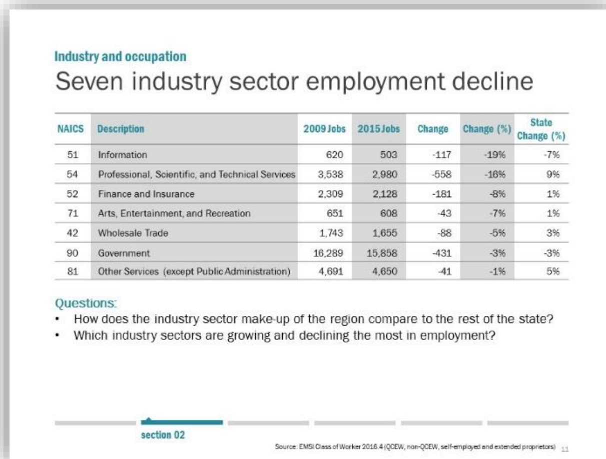
HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 19

INSTRUCTIONS

Goal: To explore declines in the region

Use the data from this chart to explore some of the region's declining industries. The guiding questions can help frame that discussion.



Industry and occupation

Seven industry sector employment decline

NAICS	Description	2009 Jobs	2015 Jobs	Change	Change (%)	State Change (%)
51	Information	620	503	-117	-19%	-7%
54	Professional, Scientific, and Technical Services	3,538	2,980	-558	-16%	9%
52	Finance and Insurance	2,309	2,128	-181	-8%	1%
71	Arts, Entertainment, and Recreation	651	608	-43	-7%	1%
42	Wholesale Trade	1,743	1,655	-88	-5%	3%
90	Government	16,289	15,858	-431	-3%	-3%
81	Other Services (except Public Administration)	4,691	4,650	-41	-1%	5%

Questions:

- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non-QCEW, self-employed and extended proprietors) 11

SLIDE #19

TIME: 5 MINUTES

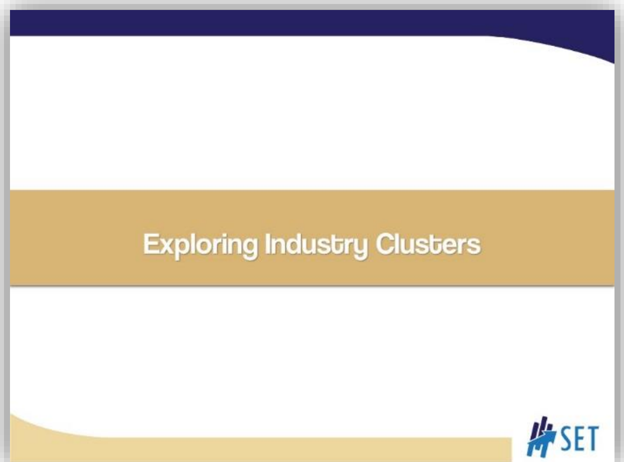
SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 20

INSTRUCTIONS

Goal: To transition to the exploration of industry clusters.



SLIDE #20

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 21

INSTRUCTIONS

Goal: Begin defining key terms for industry cluster examination.

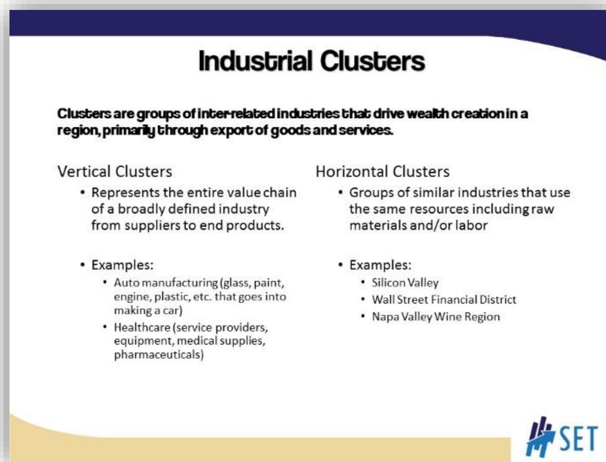
Once the group has completed examining how individual industries have performed over time, turn the participants' attention to an analysis of industrial clusters.

Clusters are groups of inter-related industries that drive wealth creation in a region, primarily through export of goods and services. The use of clusters as a descriptive tool for regional economic relationships provides a richer, more meaningful representation of local industry drivers and regional dynamics than do traditional methods. An industry cluster is different from the classic definition of industry sectors because it represents the entire value chain of a broadly defined industry from suppliers to end products, including supporting services and specialized infrastructure.

Explain the difference between vertical and horizontal clusters. Then ask the group to think of other clusters that they are familiar with or that they believe might be in their region.

Link to the taxonomy of each cluster:

http://www.statsamerica.org/innovation/reports/sections/appendix_I.pdf



SLIDE #21

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

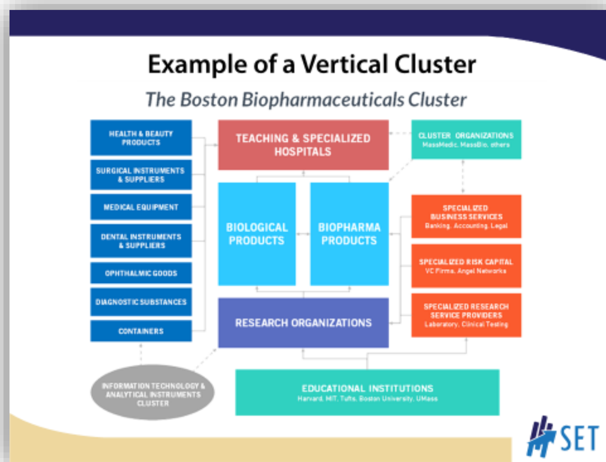
Stronger Economies Together

SLIDE 22

INSTRUCTIONS

Goal: To provide an example of a vertical cluster.

Here is an example of a vertical cluster.



SLIDE #22

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

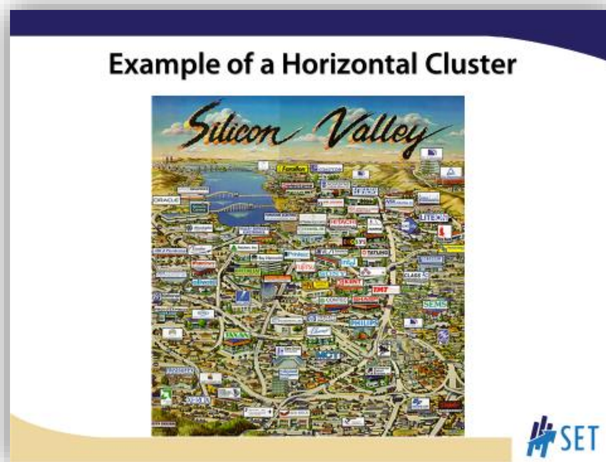
SLIDE 23

INSTRUCTIONS

Goal: To give an example of a horizontal cluster.

Silicon Valley is well known as a high-tech industry home. This is an example of a horizontal cluster in which similar industries are located in the same geographic area in order to access a similar set of resources.

Source:
https://urbanhorizon.wordpress.com/2011/07/29/the-myth-of-silicon-valley/



SLIDE #23

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 24

INSTRUCTIONS

Goal: To provide a list of the clusters used in the data

This slide lists the overarching clusters used in the data. These are not mutually exclusive.

Note that the Manufacturing Super-cluster contains the following:

- Primary Metals
- Fabricated Metal Products
- Machinery
- Computer and Electronic Products
- Electrical Equipment, Appliance and Components
- Transportation Equipment

http://prodgis2.agriculture.purdue.edu/RDM/Industry_clusters.html#

SLIDE #24

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 25

INSTRUCTIONS

Goal: To examine the ways clusters are classified

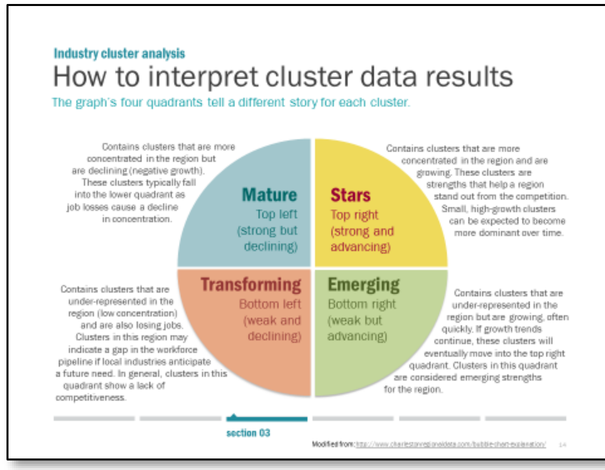
Use this slide and the associated handout in the Data SnapShot (**Handout 3**) to explain how clusters are classified.

There will be no discussion here about location quotients. Instead, we can say "we use data measuring the relative concentration of an industry and the change in concentration over time." For simplicity we can classify all clusters introduced in the previous slide in 1 of 4 possible categories: stars, emerging, mature, and transforming.

NOTE: The coach needs to be prepared to answer questions about how relative concentration is measured:

Total % employment in cluster A in region ONE/Total % employment in cluster A in COUNTRY.

If ratios are the same then relative concentration is 1 and you are "on par" with the rest of the country.



SLIDE #25

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: REGIONAL DATA SNAPSHOT – SECTION 5 INDUSTRY AND OCCUPATION (HANDOUT 3)

SLIDE 26

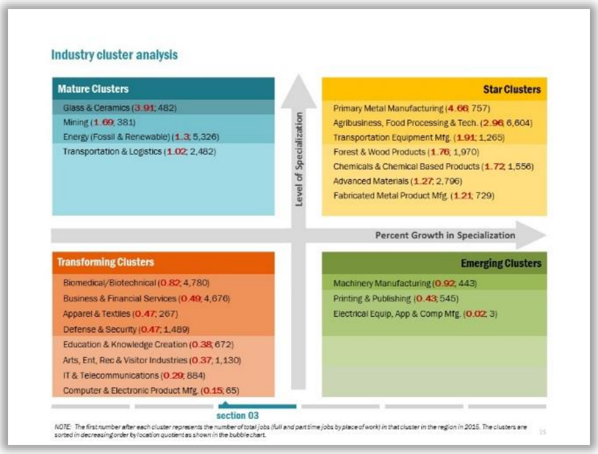
INSTRUCTIONS

Goal: To explore the industry clusters in the region by classification.

The summary chart gives an overview of how the region’s clusters are classified.

Lead a discussion using these questions or others that are appropriate for the region:

- What surprises you about this chart?
- What do you think has contributed to the “Stars”?



Pay careful attention to the total employment within each cluster. There might be a cluster classified as emerging but employment is negligible and as a result would likely need more rationale to pursue.

SLIDE #26

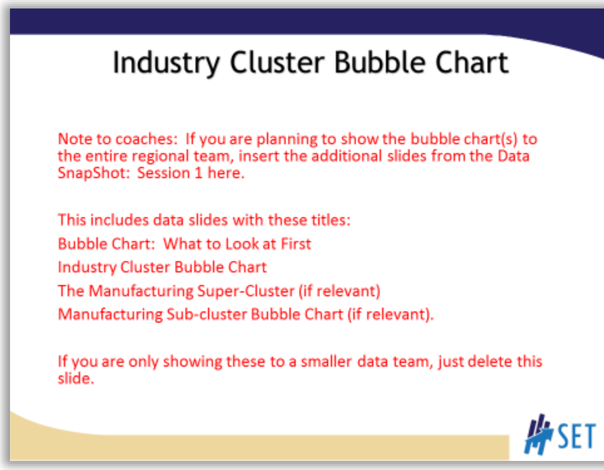
TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 27

INSTRUCTIONS



SLIDE #27

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

Goal: To explore bubble charts for the region

Regions vary greatly on their capacity and willingness to delve into the data represented on the region's bubble chart(s). As a coach, you will need to consider which approach is best for your region.

A few options include:

- Previewing the bubble charts and related data with a small regional team with expertise in understanding the data. Then have them report to the larger group.
- Go over the bubble charts with the entire regional team during Session 1
- Simply rely on the chart on the slide above as a way of exploring the regional cluster situation

If you choose to go over these data with the entire team, you will need to insert those slides here. Be sure to include the slides from the data package that help provide relevant content. These include slides with these titles:

- Bubble Chart: What to Look at First
- Industry Cluster Bubble Chart
- The Manufacturing Super-Cluster (if relevant)
- Manufacturing Sub-cluster Bubble Chart (if relevant).

SLIDE 28

INSTRUCTIONS

Goal: Transition to the final data points regarding occupations in the region.

This slide provides a transition to the exploration of regional occupations.

SLIDE #28

TIME: 1 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

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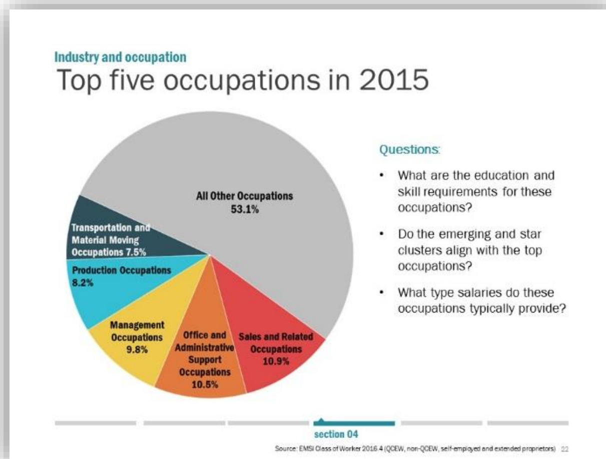
SLIDE 29

INSTRUCTIONS

Goal: To examine the top five regional occupations related to the clusters

Ask the participants to consider the questions on the slide.

Are these 5 occupations considered a cluster?



SLIDE #29

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

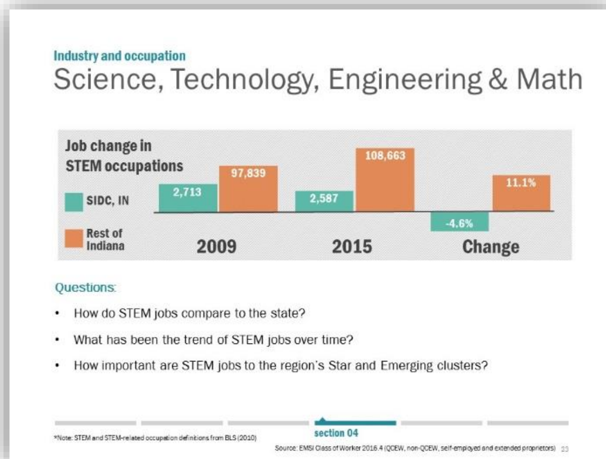
SLIDE 30

INSTRUCTIONS

Goal: To examine the specific niche of Science, Technology, Engineering & Math (STEM) jobs.

STEM jobs are gaining wide interest as economic drivers as they tend to be higher paying, creative class jobs that can boost the economy.

Have the team consider these questions related to STEM jobs in the region.



SLIDE #30

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

SLIDE 31

INSTRUCTIONS

Goal: Review data from the labor force section as it relates to the clusters.

In light of the exploration of clusters, ask the participants to review the data in section 4 of the Data SnapShot from the Civic Forum (or from summaries).

Ask the groups to identify the trends in unemployment in your region.

- people commuting into the region or commuting out of the region
- earnings comparison to the rest of state or nation

Is the region competitive?

SLIDE #31

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SESSION 1 (HANDOUT 3)

REGIONAL DATA SNAPSHOT FROM THE CIVIC FORUM OR A SUMMARY

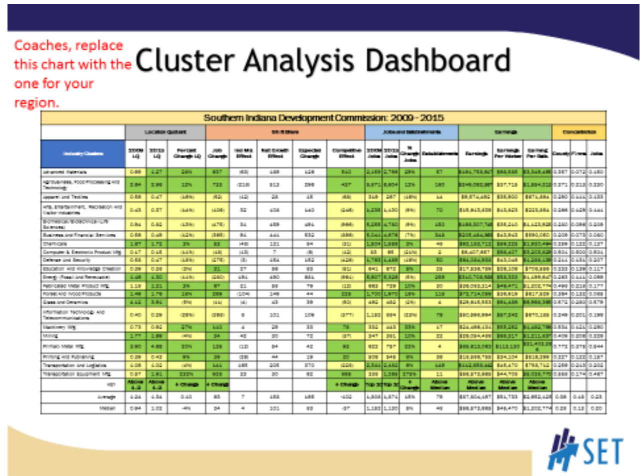
SLIDE 32

INSTRUCTIONS

Goal: To guide selection of a small number (1-3 typically; no more than 5) industries to explore in depth during the next session.

Provide copies of the data dashboard and walk participants through the various columns. Guide the discussion around the picture the whole dashboard paints recognizing that no single data point consideration tells the whole story.

Help the group come to consensus on the 1-3 clusters they would like to explore further during the next session. The following slide also provides some thoughts on the selection.



SLIDE #32

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUTS: DATA DASHBOARD PRINTED ON LEGAL SIZE PAPER

SLIDE 33

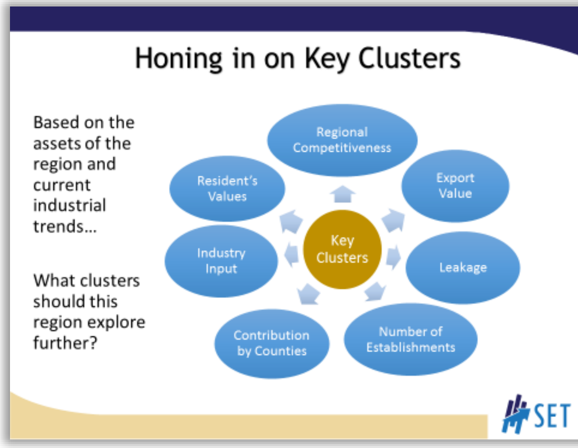
INSTRUCTIONS

Goal: To select a small number (1-3 typically; no more than 5) industries to explore in depth during the next session.

Ask the group to select the industries they believe are potential regional priority clusters. During Session 2, these key clusters will be explored further based on the information in the blue circles on this slide.

Make data requests to Purdue University as soon as possible as it may take 2 to 3 weeks to receive the report.

Who are the clusters' leaders in the region?
- Are they on the planning team?
- If not, who will invite them?



SLIDE #33

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 34

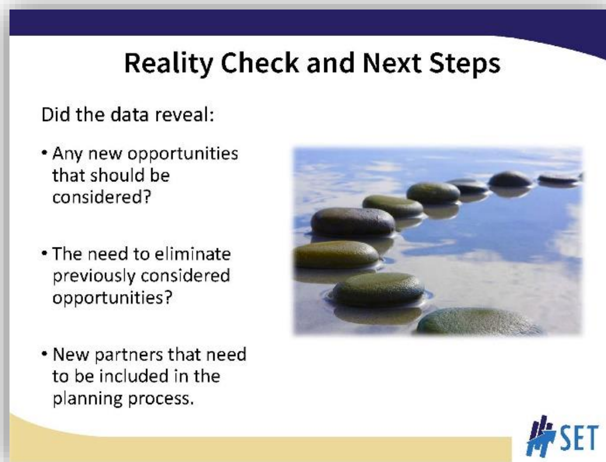
INSTRUCTIONS

Goal: Give an opportunity to add or remove a potential goal after exploring the data.

Record the new ideas and affirm the proposed regional opportunities.

Get specific commitment from individuals to invite those that are listed as new partners.

Who will commit to inviting whom?



SLIDE #34

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

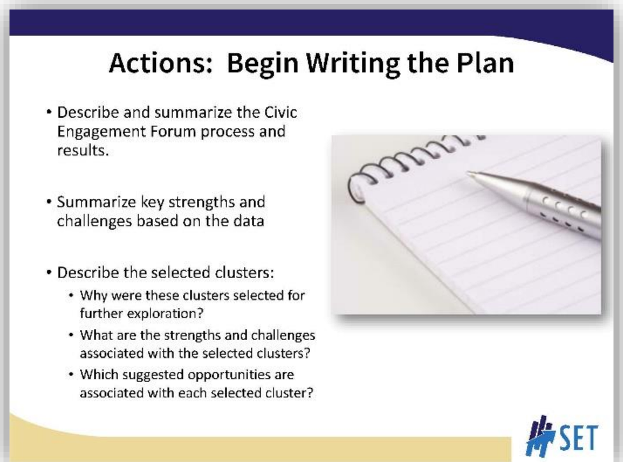
SLIDE 35

INSTRUCTIONS

Goal: Prepare a written summary of the work completed in the public form and in Session I.

A writing team should have been identified. This team will begin its work after this session. The three key segments that can now be developed are outlined on this slide. Decide on a process for writing and vetting before the next session to ensure accountability.

Discuss how this session is building the high quality plan – evidence based.



SLIDE #35

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

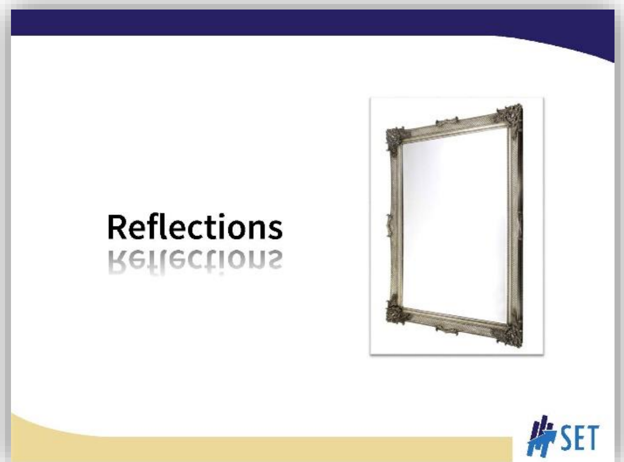
SLIDE 36

INSTRUCTIONS

Goal: Gather responses from the group on the Session and what is becoming clearer to the group.

Be sure to discuss the meeting schedule for subsequent sessions.

If participants prefer to view content outside of session time, point them to the video on Understanding Bubble Charts and Shift Share Analysis



SLIDE #36

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 37

INSTRUCTIONS

Be sure to include the coaches' contact information

SLIDE #37

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE