



CREATE BRIDGES

Before You Begin: Best Practices for Implementation & Sustainability

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BEFORE YOU BEGIN: BEST PRACTICES FOR IMPLEMENTATION & SUSTAINABILITY

OVERVIEW

Background & Overview

This module will identify best practices from Phase I and Phase II pilot states for strategy implementation as well as describe steps to ensure sustainability of the actions taken under the CREATE BRIDGES process. The pilot states faced similar challenges and created unique solutions to strategy implementation. This module will share their perspectives on what worked and what did not in terms of strategy implementation, as well as what helped them achieve a sustainable path to successful support of the CREATE sectors.

Purpose:

- Provide future teams with information that can increase the effectiveness of their program
- Build on the experiences learned from the pilot states

Process and Format Description:

- The project coordinator should review this module as early in the process as possible (preferably before a region has been selected as a CREATE BRIDGES region). Early review will prepare project leaders for questions potential RSC members may raise about how pilot states achieved their impacts through the CREATE BRIDGES process.
- This module is rich in practical information and is shared through a presentation format. It is suitable for in-person, hybrid, or virtual meetings.

Presentation Session:

- Best Practices for Implementation & Sustainability Agenda
- Estimated Time to Complete Session: 1.5 hours
- Materials Needed:
 - Flipcharts
 - Markers

Resources:

- Success Stories for Best Practices for Implementation & Sustainability
- Sample Communication Pieces
- Mountain West Roadmap Infographic
- NC Mountain West Ripple Map
- NC 2021 Year End Report
- Best Practices for Implementation & Sustainability Presentation Slides
- Best Practices for Implementation & Sustainability Agenda

BACKGROUND & OVERVIEW

Have any of you experienced this phenomenon? After several months of professionally facilitated, community-engaged planning, the following occurs: The professional writes the plan and shares it with the community. But immediately thereafter, participants in the planning go back to their regular jobs, and the plan, while having beautifully captured innovative, yet feasible, recommendations to improve the region, is put on a shelf to gather dust until someone has time on their calendars to implement the plan strategies. Which sometimes never happens.

The purpose of this module is to ensure that all the time, money, and energy invested in the organizational, research, and planning phases of the CREATE BRIDGES process are not lost but continue to grow and gain momentum during the implementation phase. Over a period of two years the pilot states each organized stakeholders, conducted research, and developed strategies as part of the CREATE BRIDGES planning process. Strategy implementation typically launched in the third year of the process. While the pandemic and other disasters slowed progress by all teams, the CREATE BRIDGES experience in most states showed that once stakeholders saw action in terms of strategy implementation, their interest, commitment, and even passion for the project increased.

After interviewing leaders from each of the six pilot states, we have observed five practices that tilt the needle towards successful implementation of CREATE BRIDGES plan strategies. Note that not all these practices were implemented by every state; some are actions that they wish they had known to take, which might have eliminated some barriers further down the road.

1. It is best to have a “boots on the ground” individual for each participating region.
2. Provide leadership training for Regional Steering Committee (RSC) members/strategy champions.
3. If possible, take action early in the process – maximize the “brilliance of small wins.”
4. Clearly define expectations for the RSC and the region.
5. Be mindful when budgeting.

This module will break down each of these five best practices and provide examples of successful strategy implementation. Also included in the Appendix are descriptions of the most successful strategies in each of the pilot states, which should be shared with RSC members as “homework.”

Best Practices for Implementation Guidance:

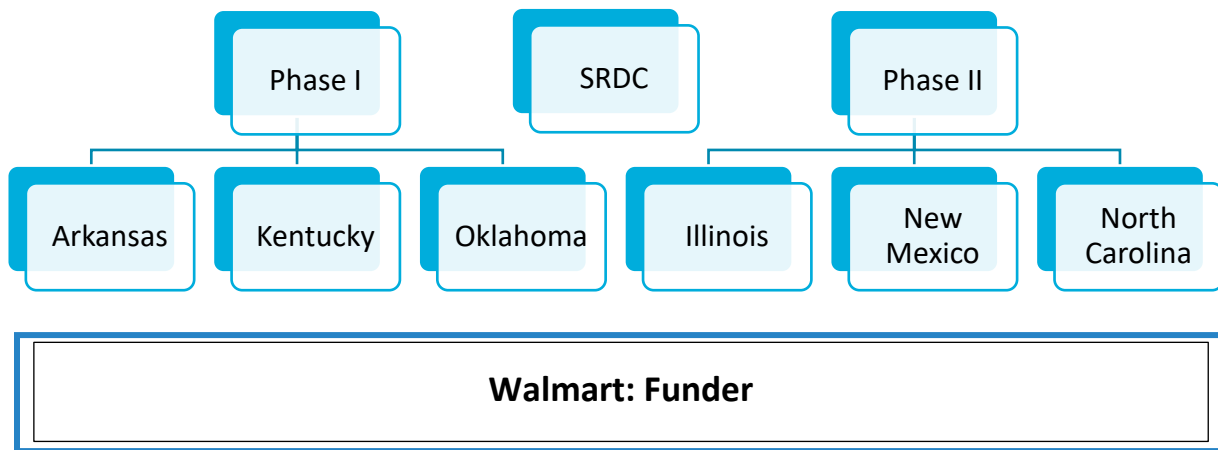
We suggest that project leaders review this module with Regional Steering Committee (RSC) members at least two times. First, present this module as a part of the Orientation process (it can be presented before the Orientation meeting itself and should definitely be presented before entering the Research phase—see *Selecting a Region*, page 3, for a suggestion on when to present this module) and second,

ask the RSC members to review it again on their own time before strategy development begins. Awareness of the five suggested practices will prepare RSC members for greater success throughout the CREATE BRIDGES process.

Steps to Sustainability:

By following the five suggested practices, the project coordinator and the RSC can expect to have a greater chance of incorporating strategies supporting the CREATE sectors as a permanent part of the economic development of their region. Likelihood of achieving additional funding to continue strategy implementation will also be increased.

Project Structure:



Pilot Project Partner Institutions:

Project Coordinator



Phase I



OKLAHOMA COOPERATIVE EXTENSION SERVICE



Phase II



Illinois Extension
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN



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EXTENSION

Special thanks to our funder



This curriculum was made possible through funding by Walmart. The findings, conclusions, and recommendations presented in this curriculum are those of the Southern Rural Development Center and its project partners alone, and do not necessarily reflect the opinions of Walmart.

This work is supported by 2022-51150-327212 from the U.S. Department of Agriculture, National Institute of Food and Agriculture.

Any opinions, findings, conclusions, or recommendations expressed in this publication are those of the author(s) and should not be construed to represent any official USDA or U.S. Government determination or policy.

TIMELINE

This module should be presented early in the orientation process to RSC members (this information can be shared after the RSC has been formed and before the Orientation meeting), and then revisited as “homework” before the module on strategy development. Strategy implementation should occur as soon as possible after strategies have been identified by stakeholders and a plan of action for their implementation completed. See the Strategy Development module for tips on how best to develop strategies and complete a plan of action. However, to keep interest alive throughout the process, it is also important to identify and implement small wins throughout the planning process.

The project coordinator should become familiar with the content of this module before presenting it to the RSC.

The presentation included in this module is best presented in a 90-minute time allotment.

PURPOSE

The purpose of this module is to educate those following the CREATE BRIDGES process on the 5 best practices for implementation and utilize lessons learned from pilot states to plan for success.

PRESENTATION SESSION

This presentation is intended to be reviewed by the project coordinator with the Regional Steering Committee early in the CREATE BRIDGES process. It will inspire the RSC in terms of the number of different successful strategies implemented by the pilot states as well as make them aware of potential pitfalls. Consider reviewing the presentation before or near orientation, during strategy development phase, and of course, again, when strategy implementation is launched. The Appendix to the presentation contains many success stories from the pilot states.

- Best Practices for Implementation & Sustainability Agenda—create this agenda based on the presentation provided and decide if you would like to share it with attendees or simply maintain it for presenter use only.
- Estimated Time to Complete Session: 1.5 hours
- Materials Needed:
 - Flipcharts
 - Markers
 - Handouts outlines in the Overview

Slide 1**INSTRUCTIONS**

Ask participants: Have any of you experienced this phenomenon? After several months of professionally facilitated, community-engaged planning, the following occurs: The professional writes the plan and shares it with the community. But immediately thereafter, participants in the planning go back to their regular jobs, and the plan, while having beautifully captured innovative and feasible recommendations to improve the region, is put on a shelf to gather dust until someone has time on their calendars to implement the plan strategies. Which sometimes never happens.

Ask a few of the participants to share out their answers.

The purpose of this module is to ensure that all the time, money, and energy invested in the organizational, research, and planning phases of the CREATE BRIDGES process are not lost but continue to grow and gain momentum during and after the implementation phase. This module will break down each of five best practices identified by the pilot states as well as provide examples of successful strategy implementation. Also included in the Appendix are descriptions of the most successful strategies in each of the states.



SLIDE #1

TIME: 3 MINUTES

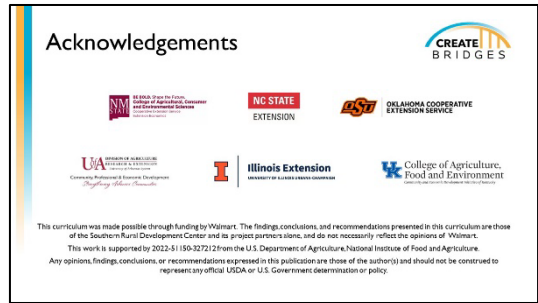
MATERIALS: NONE

HANDOUTS: NONE

Slide 2

INSTRUCTIONS

Share this acknowledgment of the partnerships with CREATE BRIDGES.



SLIDE #2

TIME: 1 MINUTE

MATERIALS: NONE

HANDOUTS: NONE

Slide 3

INSTRUCTIONS

After interviewing state leads from each of the pilot states, the following five common themes represent the best practices observed. Note that not all best practices were implemented by all states; some are actions that they wish they had known to take earlier. Looking back, those states who did not adopt all practices have indicated that they wish that they had, as these practices might have eliminated some of the barriers further down the road.

The following slides will break down each of these themes: Boots on the Ground, Leadership and Connections, Defined Expectations, Early Actions, and Mindful Budgeting.



SLIDE #3

TIME: 2 MINUTES


MATERIALS: NONE


HANDOUTS: NONE

Slide 4

INSTRUCTIONS

The first common theme shared by the pilot teams was to have a full or part-time local person identified to assist throughout the CREATE BRIDGES process. Having “boots on the ground” helps teams instill sustainability practices at the beginning of the process by delegating strategy development and implementation directly to the Regional Steering Committee (RSC) and other local organizations/champions. Hiring local/regional coordinators, as well as empowering/developing a “leadership cohort,” a group of community members with a shared sense of responsibility towards accomplishing the project’s goals, has significant impact on the effectiveness and sustainability of the process.



“Boots on the Ground” 

- a. Hire a regional coordinator
- b. Identify local champions for strategy implementation (may not be on your Regional Steering Committee (RSC))

- Lays groundwork for sustainability AFTER project lead is gone
- Helps with delegation of strategies within community

“Due to [COVID] safety guidelines, it was difficult for our RSC to keep up so the [regional] coordinators were able to build relationships with business owners and hear their struggles and connect those business owners to resources. Those responses also informed strategies.”
-Arkansas

SLIDE #4

TIME: 3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Below is a summary of the pilot states’ efforts at delegating strategy implementation away from the project leader to the RSC/stakeholders themselves.

Phase I - Phase I project leaders tried to delegate strategy development and implementation to the RSC, but that proved difficult, especially during the pandemic. Some of the RSCs considered hiring in-region coordinators, while others tried to manage the process themselves. Some new issues arose during the pandemic, and many existing issues were exacerbated by the economic environment brought on by the effects of COVID-19.

QUOTE FROM ARKANSAS “DUE TO THE SAFETY GUIDELINES, IT WAS DIFFICULT FOR OUR RSC TO KEEP UP. THE (LOCAL) COORDINATORS WERE ABLE TO BUILD RELATIONSHIPS WITH BUSINESS OWNERS AND HEAR THEIR STRUGGLES AND CONNECT THOSE BUSINESS OWNERS TO RESOURCES. THOSE RESPONSES ALSO INFORMED STRATEGIES.”

Phase II - Each state had a different approach to strategy delegation; Illinois worked with existing regional partners; in North Carolina RSC members volunteered to lead the strategies they were most interested in; however, they also benefited from having a local coordinator manage the RSC members. In New Mexico organizations were invited to apply for funding of proposed strategies that fell within prescribed guidelines.

QUOTE FROM NORTH CAROLINA “IT IS CRITICAL TO HAVE PAID STAFF BASED IN THE REGION TO GUIDE THE IMPLEMENTATION OF CREATE STRATEGIES. IT HAS MADE ALL THE DIFFERENCE IN THE WORLD.”

The pilot states strongly encourage project coordinators and RSCs to hire a local person, based in the region, to assist with strategy implementation, if the project coordinator does not already serve in that role. This local presence will lay the groundwork for sustainability of the project after the project coordinator is gone, as well as helps with the delegation of strategies within the community.

In addition to having a full- or part-time person whose job is to support strategy implementation, it is also important to identify local champions willing to take actions toward implementation. More on this in the next few slides.


Slide 5

INSTRUCTIONS

Having Boots on the Ground means that there is increased local capacity to develop and implement regional strategies. Most members of the RSC may be “siloeed” and only able to contribute to a strategy’s implementation within their own designated territories. Having a local person identified, who can cross political and geographical lines, helps blur those lines for strategy implementation purposes. In addition, think outside of the box as to who can fill those “boots.” In North Carolina, that person had significant experience in the CREATE sector and because of that history was able to build connections more easily within the sector.

If a region has not identified or is unable, due to financial constraints, to identify a local person to lead strategy implementation from the outset, consider reaching out to a local college or university for student support. Working with faculty, regional strategy implementation can be translated into a capstone or other major project for interested students. For example, in North Carolina a member of the RSC, who was a faculty member at the local university, suggested that they lead a secret shopper review of businesses throughout the region. Their students conducted the review, reported the aggregate results, then made suggestions to the university on how it might better connect with the region through student support. In addition, since the pilot states had funding, they were also able to hire student workers to assist in strategy implementation. A region with less funding might be able to recruit an unpaid intern who could serve in a similar role.

To sustain strategy implementation beyond the initial project period, work with your local RSC members to identify potential funding sources for the continuation of the work. Again, most of the proposed funding would need to be dedicated to a position whose primary purpose is the continuation of the work. Impacts from early wins in the initial planning provide evidence of the effectiveness of the strategies, thus strengthening an application for more funding. In North Carolina, the regional council of governments sought additional funding to continue CREATE BRIDGES strategies for another two years beyond the initial grant period. The sustainability argument to the funder is that strategies will become more established with the passage of more time - more time to transfer responsibility for strategy continuation to trusted partners and local champions and more time to evaluate impacts of those strategies. With strong evidence of their effectiveness, local governments and other resource providers



Increase Local Capacity

- Think outside of the box to identify the local lead.
- If you do not already have a local person leading strategy implementation, consider recruiting college students to shadow your activities or work with your local partners to identify someone within 6 months of project end who can shadow your activities.
- Engage your local partners in identifying local funders to support a local position, whose primary purpose is to continue the implementation of CREATE BRIDGES strategies.

SLIDE #5

TIME: 10 MINUTES

MATERIALS: FLIP CHART AND MARKERS

HANDOUTS: NONE

will be more likely to support these strategies with funding or adopt them into their own programming services.

When reviewing this module again prior to the RSC undertaking strategy development, ask participants to take a few minutes to consider the following questions:

- a. Who in your region might have the capacity to take on tasks related to strategy implementation?
- b. What skill sets might they bring? Are they familiar with the CREATE businesses in the region?
- c. Can college students broaden the capacity to do more in respect of strategy implementation?

Slide 6

INSTRUCTIONS

As previously mentioned, having paid local staff, either an employee of an RSC member or an independent contractor, who is dedicated to strategy implementation, is key both during the initial project period as well as after. At least 6 months prior to project end, it is important to identify any other local resources that will give these strategies attention beyond the end of the project term. In other words, it is critical to “plan for continued success” beyond the project period. In North Carolina, members of the Regional Steering Committee did this by electing to adopt a new name for the CREATE BRIDGES initiative, one that better reflected the region’s identity and its desire to act collectively. Using this new name, they have successfully applied for and received funding for continued strategy implementation beyond the initial project period.

Keep in mind that the composition of the RSC could and should change over time. Community stakeholders who did not actively take part in the planning process may become interested later during strategy development and implementation. Let them step in and show up when they are most comfortable in the process. Their participation may lead to the recruitment of even more members to the RSC, thus broadening regional engagement in the process and potential for new support of the strategies.


When engaged in strategy development, ask participants to take a few minutes to consider the following:

- a. Who will benefit from the CREATE strategies?
- b. What charitable organization or other funder has an interest in further supporting these beneficiaries and the CREATE economy?

Record their answers on the flip chart.

Plan for Continued Success

- At 6 months prior to project end, identify local resources that will give CREATE BRIDGES strategies attention beyond the end of the project term.
- Consider giving the strategies a different name that ties more directly to the region.
- Build momentum for CREATE BRIDGES strategies by recruiting new members to the implementation team.



SLIDE #6

TIME: 8 MINUTES

MATERIALS: FLIP CHART AND MARKERS

HANDOUTS: NONE

Slide 7


INSTRUCTIONS


The second common theme on best practices of strategy implementation and sustainability is the need to connect with and build local leadership earlier than later. This theme goes hand in hand with the first theme of having boots on the ground.

Many Phase I states wished they had provided a more intensive leadership development/team building component or training for the RSC and community members who were interested in strategy implementation. Realizing that project leaders would not be in the region forever was a reality check for RSC members. Leadership/team building trainings for RSC members could have resulted in more realistic expectations of the project as well as a broader understanding of the feasibility of strategies.

Ideally, these trainings could help create a sense of shared responsibility, so “community champions” would not feel alone in implementation. A shared responsibility together with interpersonal relationships between community members and RSC members can help move the project forward as well as improve the chances of sustainability. Many states offer rural leadership training opportunities. For example, in North Carolina there is the Rural Economic Development Institute and Hometown Leaders program. Coordinating with those opportunities may result in taking more ownership of the CREATE BRIDGES project by RSC members.

If the RSC members at least know ahead of time what the projected timeline to completion is as well as have the tools to work through that timeline, there is less opportunity for burnout. It is important to remind them that once they reach the strategy development phase of the project, interest in the project among RSC members will be rekindled.



Connecting With and Building Local Leadership 

- Realizing that project leads would not be there forever was a reality check for many RSCs
- Many state RSCs suffered from burnout, changing leadership, or the “same ten people” issue
- Some institutional barriers (time) impacted RSC involvement

“If the leadership who already does everything didn’t have a plan or other people they could ask to help, then it was dead in the water...Perhaps more leadership development work should’ve happened to set up success in feasibility and succession planning.” - Arkansas

SLIDE #7

TIME: 2 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 8

INSTRUCTIONS

Drilling down into the second theme of Connecting with and Building Local Leadership, the pilot states made the following suggestions on how to build connections:


First, rely on established economic development partners before creating new ones. In North Carolina, this meant university representatives worked primarily with the regional council of governments, who already is tasked with a variety of economic development planning initiatives.

Working through the regional economic development agency was also the strategy followed in New Mexico. There the regional economic development agency had been established through the Stronger Economies Together initiative a few years prior and was therefore the logical partner for the CREATE BRIDGES initiative.

The second suggestion for building connections and leadership is to identify new partners/local champions through established connections and demonstrated commitment to strategy development and implementation. Always work with the RSC, not around it. RSC members will most likely have much greater knowledge of stakeholders in the region than the project leader. Similarly, allow for the rise of “natural champions” from the RSC, or a contact of the RSC, to lead strategy implementation and, ultimately, project sustainability.

Third, as the RSC expands through the organic growth of a regional network, be sure to communicate with this expanded network through regular communication. In Arkansas, they hosted monthly and quarterly meetings and hired a regional program coordinator who lived and worked in the area to help coordinate agencies, organizations, and people. The regional coordinators traveled the tri-county area and made personal visits to business owners and held speaking engagements at city halls, quorum courts, and chambers of commerce to publicize CREATE BRIDGES activities and impacts. Similarly, the North Carolina team made communication a key part of the CREATE BRIDGES effort. Businesses are now connected through both Facebook and Instagram group accounts. The RSC also remains in the loop through regular newsletters.

Finally, after project end, the project coordinator should stay in touch with the RSC and other community champions to provide ongoing guidance and support of their efforts.

Building Connections 

- Rely on established economic development partners before creating new ones
- Identify new partners/local champions through established connections and demonstrated commitment to strategy development and implementation
- Inform this expanded network through regular communication
- Continue to provide guidance for implementation efforts of existing and new local champions after the project period

SLIDE #8

TIME: 6 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 9

INSTRUCTIONS

A few more words on relying on trusted partners. . . . On this slide you see a list of suggested partners enlisted by Phase II project leaders. These partners can bring more capacity and potential for sustainability or financial support to the project, as shown on the slide and described in the examples below.

Illinois - For University of Illinois Extension, the CREATE BRIDGES Southern Five Region participated in Stronger Economies Together (SET) and thus had a history of working together for regional economic prosperity. In addition, the project coordinator was based in that region and had previously worked in those five counties, so connections had been established in advance of the CREATE BRIDGES pilot initiative.

New Mexico - In New Mexico RSC members engaged business and community leaders in CREATE activities (forum, business and employee surveys, academy). Social media posts on the Northeast Economic Development Organization (NEEDO) website were instrumental in increasing the public visibility and participation in CREATE activities. NEEDO leadership also reached out and secured the participation of regional economic and workforce development partners in the region.

North Carolina - In North Carolina, a representative of the regional university had co-chaired the CREATE BRIDGES process. That connection brought in faculty, students, and administrative support into both the planning and implementation of many of the primary strategies. The North Carolina team worked closely with the regional university's Department of Business to develop employee trainings as well as support local businesses through a student-led secret shopper review process. It also worked closely with the university's marketing and A/V departments. The university had previously set a goal of improved community engagement within the region but upon learning more about CREATE BRIDGES, committed to supporting the CREATE BRIDGES strategies through social media posts promoting trainings and events as well as local business video spotlights.

The North Carolina team also joined forces with the regional workforce agency located in the region's council of governments to promote programming and resources related to non-traditional talent pools.

Relying on Trusted Partners

- Trusted partners can include local, regional, or state governments, agencies, or organizations
- Have possible capacity to continue work after project end
- Higher Ed Institutions can provide possible student support of continued strategy implementation
- May provide access to additional funding opportunities



SLIDE #9

TIME: 5 MINUTES

MATERIALS: FLIP CHART AND MARKERS

HANDOUTS: NONE

When preparing for strategy development, ask participants to take a few minutes to consider the following:

- a. Are all resources for the CREATE business sector involved in strategy development?
- b. What funding is available in your region that could support strategy implementation?


Record their answers on a flip chart.

Slide 10

INSTRUCTIONS

Often leaders arise naturally because of their interests and passions. These people may or may not be part of the initial makeup of the RSC but should be brought into the RSC once their commitment to a strategy is identified.

Ask the RSC at every meeting, “Who else should be included? Who is missing and could help with this strategy?”



Identifying Local Champions

- Connect to locals through trusted channels
- Match interest and passion with selected strategies
- Validate the champion through recognition opportunities
- Include youth in strategy implementation

Oklahoma - In Oklahoma, connections with potential new leaders were built primarily through in-person and one-on-one visits with community leaders and stakeholders.

SLIDE #10

TIME: 2 MINUTES

MATERIALS: NONE


North Carolina - In North Carolina, certain members of the steering committee emerged as champions of the various initiatives following its three strategy sessions. The local university’s department of business had been particularly active in several strategies by engaging students to conduct local business reviews and by developing social media posts promoting employer and employee trainings. In addition, businesses who took the employer trainings early in the process became engaged in planning efforts on employee trainings. Career and Technical Education counselors from the local school systems developed field trips where employees in the CREATE sectors talked to high school students about the career opportunities in their sectors.

HANDOUTS: NONE

Slide 11

INSTRUCTIONS

Communication is an important building block for having and keeping an effective RSC as well as building awareness of the initiative throughout the region. This slide shows several channels of communication to keep the conversation going in the region about the CREATE BRIDGES initiative and its impacts.



Regular Communication

- Monthly newsletters to Regional Steering Committee and business community
- Social media posts
- Demonstrate ongoing connection with business community through networking and group channels
 - Chambers
 - Tourism Development Authorities
 - Business/entrepreneurship Classes
- Create Web Presence

Read the bulleted items on the slide.

SLIDE #11

In Arkansas, they hosted monthly and quarterly meetings and hired a regional program coordinator who lived and worked in the area to help coordinate agencies, organizations, and people. The regional coordinators traveled the tri-county area and made personal visits to business owners and held speaking engagements at city halls, quorum courts, and chambers of commerce to publicize CREATE BRIDGES activities and impacts.

TIME: 2 MINUTES

MATERIALS: NONE

HANDOUTS: SAMPLE COMMUNICATION PIECES

The North Carolina team made communication a key part of its CREATE BRIDGES effort. Businesses are connected through both Facebook and Instagram group accounts. The North Carolina team also created a regional web presence that houses resources for both employers and employees.


Distribute handouts of sample communication pieces.

Slide 12**INSTRUCTIONS**

An unfortunate criticism of strategic planning initiated through grant funding or facilitated through non-local organizations is that once the funding is gone, the project coordinator is also gone. This is why it is so important to build ownership of the strategic planning effort by the RSC and other local champions.

One way to build RSC confidence in their ability to continue the work started under the CREATE BRIDGES initiative is for the project coordinator simply to stay in touch after the initial project period ends. As potential grant opportunities come across your desk, forward them to your RSC contacts, and remain available to answer questions and suggest solutions.

Continuing Guidance



- Stay in touch
- Include local champions in email chains concerning grant and other resource opportunities
- Remain available to answer questions and suggest solutions

SLIDE #12

TIME: 1 MINUTE


MATERIALS: NONE

HANDOUTS: NONE

Slide 13

INSTRUCTIONS

A primary purpose of the CREATE BRIDGES initiative is to support regional workforce development efforts in the retail, accommodation, tourism, and entertainment sectors. What that support (i.e., strategies) looked like varied from state to state, and ranged from traditional trainings for both employers and employees to wraparound services, including quality of life initiatives.




Clearly Defined Expectations

- a. Use of funds
- b. What constitutes "Workforce Development" "What is the "region" and how to implement "regionalism"
- c. How research/data is integral to implementation and sustainability
- d. Aligning with Community-Led Goals

- Training vs. Training and Wraparound Services (quality of life)
- Responsibilities, sustainability
- Timeline and importance of data collection

"Have a clear understanding of what workforce development is and make sure that aligns with the community's definition. What we brought as workforce development, addressed quality of life, obstacle addressing." - Arkansas



SLIDE #13

TIME: 2 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Nearly all state teams emphasized the importance of the third theme of this module –clearly defining and setting expectations for all parties involved with the CREATE BRIDGES process. Due to funder parameters, all state project leaders had to have a full view of what funds could and could not be used for, so that they could relay those parameters back to community members without diminishing enthusiasm for projects.

What constituted “Workforce Development,” how the “region” is defined and how to nurture “regionalism” topped the list of what strategies could be implemented. More on those challenges is presented in the slides that follow.

Similarly, state project leaders had to ensure that the research/data gathered early in the CREATE BRIDGES process remained integral to strategy implementation and sustainability.

Finally, there were clear markers that the CREATE BRIDGES process should not, and could not, duplicate or infringe upon any other initiatives currently underway in the region.


Slide 14

INSTRUCTIONS

Developing a shared definition of workforce development is critical to the success of the CREATE BRIDGES initiative. Understanding what that definition does and does not include helps determine the feasibility of strategies and creates buy-in for the RSC and community members.

Workforce development involves the following five steps:

- 1) Connecting with businesses to determine their current and future workforce needs;
- 2) Assessing the workforce and identifying populations that need assistance in entering the workforce;
- 3) Identifying holes in the workforce as well as workforce skills gaps;
- 4) Developing and maintaining initiatives and programs to close the gap between workforce and employers; and
- 5) Providing services to businesses to help them develop their workforce.

 **Defining Workforce Development**

How does the local/regional Workforce Development Board define it?

How does it support the CREATE sectors?

What is the argument to support sustained support of the CREATE sectors?

SLIDE #14

TIME: 8 MINUTES

MATERIALS: FLIP CHART AND MARKERS

HANDOUTS: NONE

Whereas the focus of workforce development has traditionally been on supporting jobs in higher paying sectors like manufacturing, healthcare, and logistics, the CREATE BRIDGES initiative has brought awareness to the need for workforce development in the retail, accommodation, entertainment, and tourism sectors, especially because of the rise of tourism as an economic driver in many of the CREATE BRIDGES regions. Without vibrant hospitality and entertainment subsectors supporting tourism, a community's primary source of revenue could go away.

Examples of traditional workforce development programming implemented by pilot states are given below.

Illinois - The Illinois team prepared strategies that included a set of workforce training opportunities for business owners, managers, incumbent workers, other adult learners, and young adults who are needed to fill entry level positions in retail and hospitality sector businesses. This was in keeping with survey findings from the CREATE BRIDGES effort. Their program offerings included: SERV Safe Manager; LinkedIn Learning for Libraries; Real Colors; Age Matters; Customer Service; and Customer Service Diversity.

Arkansas - In Arkansas, they launched an online, self-paced workforce training program called CREATE LIFT (Leading Innovation Through WorkForce Training) that consisted of 5 modules: Essential Skills, Customer Service, Hospitality, Technology and Marketing, and Tourism. After completing all modules, participants received a certificate demonstrating their mastery of the competencies in the program. Each module had a series of questions and required at least an 80% in correct answers to pass. The Tourism module had content specific to each region. Participants also had optional course content under Hospitality that was specific to the food industry.

North Carolina - In North Carolina, CREATE Sector employers attended the “Got Your Back” Business Summit, a full-day in-person workshop that covered the following topics: Recruitment and Retention; Workplace Benefits; Workplace Culture; Leadership; Diversity, Equity, and Inclusion; Trainings and Promotions; Setting Performance Expectations; and Evaluations. All these topics were intended to increase employer appreciation of their employees and to give them tools to support their employees’ development. These employers also engaged in planning of soft skills “Ready to Rock” trainings for their employees including such topics as Emotional Intelligence, Empathy, Team-player Attitude, Work Ethic, Adaptability, Growth Mindset, Openness to Feedback, and De-escalation Tactics.

The in-person Got Your Back employer trainings were filmed; these videos have become available as an on-demand online course to enable more employers to receive regional recognition as a business that supports its employees. The Ready to Rock employee trainings also became available as an online, on-demand training. Employers also encouraged their employees to act as representatives of the business for students on high school field trips.

Ask participants to take a few minutes to consider the following:


- What types of trainings are already available in your region for CREATE sector employees?
- Are they available in an online, on-demand format?
- What types of trainings are already available in your region for CREATE sector employers and are they available in an online, on-demand format?

Record their responses on a flipchart.

Slide 15

INSTRUCTIONS

All state leads struggled with whether CREATE BRIDGES workforce development strategies should be limited to trainings, or should the employee's well-being also be factored into this definition? As shown in the previous slide, all states offered employee trainings, but some states also implemented strategies that enhanced quality of life and community engagement opportunities.

Defining Workforce Development 

How does the community define workforce development?

- Quality of Life
- Worker Support
- Entrepreneurial Support

SLIDE #15

New Mexico - In New Mexico, workforce development training was one of six identified CREATE strategy areas for the region. Other strategies included entrepreneurship and business support, regional tourism promotion, and agri-business and food related value-added activities tied to tourism.

TIME: 8 MINUTES

MATERIALS: NONE

Kentucky - In Kentucky, two of their most successful strategies did not involve formal trainings, but nonetheless directly impacted the workforce. The first strategy provided financial compensation to employees for completing the employee perspective survey. This strategy allowed the state team to gather data from the employee's perspective as well as support those employees financially during the height of the COVID-19 pandemic with compensation in the form of uniform vouchers, gas cards, and childcare services.

HANDOUTS: SUCCESS STORIES FOR BEST PRACTICES FOR IMPLEMENTATION & SUSTAINABILITY

The second successful strategy implemented by the Kentucky team was the Regional Youth Help Desk, where youth in the service region partnered with a business owner to develop employability skills as well as take pressure off the owner to develop social media content. Youth had weekly informational sessions and assignments to support business owners.

North Carolina – In North Carolina, the project team contracted with a local videographer to capture origin stories of local businesses. The purpose of this strategy was to build awareness of the business in the region as well as encourage entrepreneurship.

Slide 16

INSTRUCTIONS

Data collection is an integral part of the CREATE BRIDGES process. Feedback from both business owners and employees is gathered to inform the RSC and other stakeholders on the current state of the CREATE sector economy in the region.


The primary data collected through the BR&E and Employee Perspectives Surveys, along with secondary data regarding salary and other matters, is shared with the region at the CREATE Academy and becomes the foundation for strategy development. Stakeholders need to understand the role this data plays in the development and implementation of their strategies, so that they are not distracted by other needs in their region.

Data allows the region to assess the needs of the CREATE sector, validates (or discredits) any assumptions stakeholders have about the CREATE sector, helps them identify their priorities and allocate resources, and provides a base by which to measure progress once strategies are implemented.

Ask participants to take a few minutes to consider the following:

- a. What is your experience with interpreting and using data?
- b. How does data play a role in your planning efforts?

Record their responses on a flip chart.



Using Data

- Integral part to the CREATE BRIDGES process
- Guides strategy development, implementation, and sustainability by
 - Assessing Needs
 - Validating Assumptions
 - Identifying Priorities
 - Allocating Resources
 - Providing Metrics

SLIDE #16

TIME: 5 MINUTES

MATERIALS: FLIP CHART AND MARKERS

HANDOUTS: NONE

Slide 17

INSTRUCTIONS

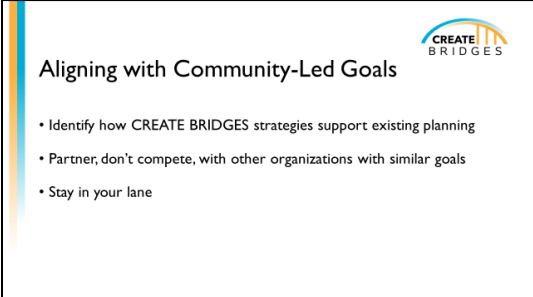
It is important that the CREATE BRIDGES process not duplicate or conflict with other planning efforts in the region. Even more important is to examine how the CREATE BRIDGES strategies can support existing planning. Most of the regions already had tourism identified as a targeted sector for development before the CREATE BRIDGES process was launched, so CREATE BRIDGES strategies typically complimented or enhanced those efforts.

Many of the regions already had significant broadband and housing initiatives underway, so in some cases, project leads were advised to stay away from CREATE BRIDGES strategies that would impact either of those economic issues.

Kentucky - In Kentucky, most communities in the service region had a goal to increase tourism in the area. Kentucky's CREATE BRIDGES strategies utilized this goal and empowered employees to take tourism into account when interacting with customers. Its online workforce development curriculum had lessons for employees and employers, and demonstrated the importance of online marketing in attracting customers who are visiting the area. Many of the communities hoped to retain young people as employees, and by supplying trainings on online marketing, employers were able to empower young employees with those responsibilities and encourage them to consider these positions as careers and not just jobs. The Regional Youth Help Desk also created advertisements for many local businesses to use in their social media to bring in customers.

In addition, the Kentucky team developed a Regional Shop Local campaign that guides visitors on "itineraries" that take them through counties in the region and visit businesses not often considered "tourism", such as gas stations and local grocery stores.

Oklahoma - In Oklahoma, the CREATE strategies areas aligned well with local (county and municipal), regional, and state economic development priorities as identified in their economic development plans. For example, regional workforce development boards had been tasked with expanding their efforts in rural communities but needed assistance in establishing local connections and determining skills gaps and training needs. CREATE BRIDGES was able to partner with the regional workforce board to provide the community connections, as well as data on what trainings were most needed for the CREATE sectors in the region.



Aligning with Community-Led Goals

- Identify how CREATE BRIDGES strategies support existing planning
- Partner, don't compete, with other organizations with similar goals
- Stay in your lane

SLIDE #17

TIME: 5 MINUTES

MATERIALS: FLIP CHART, MARKERS, NC 2021
YEAR END REPORT

HANDOUTS: NONE

New Mexico - In New Mexico, the region's tourism heritage was supported and expanded by the CREATE BRIDGES strategies developed during the program process. Communities with rich histories were provided with resources to share and promote tourism opportunities in the region, including pocket maps and placemats for local restaurants.


Illinois - In Illinois, while not previously excluded from local or regional planning efforts, the CREATE Sectors were often not the first consideration. However, the data sets introduced during the CREATE Academy events outlined to planning groups and community leaders the importance of the retail and hospitality sector to the sustainability of the Southern Five region.

North Carolina - In North Carolina, RSC members were canvased during the planning process about other economic development activities and plans in existence. The team created a list of current projects and related goal activities and included it as an appendix to its NC 2021 Year End Report. One RSC member described the list as being one of the “most useful outputs” of the process. Because of other initiatives in the region directed towards broadband expansion and housing, the North Carolina CREATE BRIDGES team was advised not to address these issues, but to focus entirely on employer business needs, employee growth potential, and regional asset cross-marketing.

Slide 18

INSTRUCTIONS

One of the most difficult challenges faced by the pilot states was breaking down county silos to allow for more regional collaboration. By initially working with already established regional resources, some states found that the road was already paved for having regional collaborative conversations. These regional resources built a bridge to county resources, thus creating more trust at the onset.



Building Regionalism

- Identify all resources in the region with similar goals
- Involve them in strategy implementation as much as possible
- Offer to support their funding requests, so long as it aligns with CREATE BRIDGES strategies.

SLIDE #18

All states suggest that you involve these regional resources as much as possible in strategy implementation and offer to support their projects and outreach as much as possible.

TIME: 5 MINUTES

MATERIALS: FLIP CHART AND MARKERS

North Carolina – In North Carolina, the project team worked primarily with two regional entities, the council of

HANDOUTS: NONE

governments, which served the 4 counties participating in the CREATE BRIDGES process, and a regional university that served all southwestern North Carolina. Working with local tourism offices proved challenging because of their mandate to limit their support to their respective counties.

Arkansas - In Arkansas, there was little overlap in local and regional planning opportunities, but CREATE strategies tried to link them together through strategies that would foster collaboration. For example, each county had their own marketing programs and needs. Through CREATE PROJECTS (Project Resources for Optimizing and Jumpstarting Effective, Collaborative, and Timely Strategies) multi-city and multi-county conversations were started to help promote regional tourism and business support. CREATE FORCE (Foster Opportunities for Rural Chamber Excellence) was another initiative designed to bring chambers of commerce together to learn from one another, share what their experience was like, and promote more regionalism in planning and activities. The goal was to strengthen local chambers of commerce so that they could better serve the CREATE business sectors and enhance their offerings, support, and services. Despite the efforts of program leadership, however, communities remained hyper-focused on themselves and consequently, participation in CREATE FORCE was low. Each region will face their own unique challenges in building regionalism, but the pilot teams found the effort was still worth it despite the challenges encountered.

Ask the participants to take a few minutes to consider who in the room (or not in the room) offers the best connection to county and regional partners.

Record their responses on a flip chart.

Slide 19

INSTRUCTIONS

The fourth common theme regarding strategy implementation and sustainability that came from the pilot states was to take at least some action early.

The project leaders quickly learned that regions became disenfranchised with how long the data collection portion of the process was taking. As stated earlier, fully educating the RSC on why the data is integral to the success of the project is very important. But because CREATE BRIDGES was funded through a university in each of the states, getting anything approved or purchased typically required a lot of time. That caused some frustration at the community level, so it became important to have some “small wins” early in the planning process.

Take Action Early

- a. Reduces meeting fatigue - creates momentum for continued progress
- b. Consider engaging employers first in rollout of strategies
- c. Region may be more engaged with youth-oriented strategies (career cafes; secret shopper reviews; regional youth help desk)

- The brilliance of “small wins”
- Visible or tangible outcomes for communities
- Encouraged RSCs who were becoming frustrated with barriers and timelines (data collection)

“Regional tourism is generally considered to be an economic driver, so starting with a tangible product that supported regional tourism was especially effective and attention-getting.” – New Mexico

SLIDE #19

TIME: 8 MINUTES

MATERIALS: FLIP CHART AND MARKERS

HANDOUTS: NONE

Pilot states found that while there was no consistency as to which strategies were successful, there were some programs, typically those involving youth or those that gained visible/tangible outcomes quickly, that re-energized stakeholder interest in the project. When asked what strategies were well received, and what made those strategies most effective, Phase I and Phase II states said:

Phase I - It was difficult to tell what would be effective/impactful or not. Sometimes there would be a lot of traction, but few attendees. Funding for micro-projects selected by communities did well in all 3 states. In Kentucky, youth-oriented programs were successful. The first round of online workforce development trainings in Arkansas had a strong showing, but the second round did not. Overall, strategies that involved telling stories (Arkansas podcast) or where the community had something visible to show for the efforts enjoyed the most success.

QUOTE FROM ARKANSAS - “THE LENGTH OF TIME BETWEEN GETTING EXCITED AND MAKING IT HAPPEN MAY HAVE TAKEN TOO LONG. MONEY IS NOT THE MOTIVATOR, REACHING OUT THROUGH A VARIETY OF CHANNELS ISN’T THE MOTIVATOR, SO WHAT IS THE MOTIVATOR?”

Phase II - Each of the 3 states had success with different programs. In Illinois there was support around BR&E, local education, and online presence. In North Carolina employers and employees enjoyed the WeSpeakWNC programming around employees as regional ambassadors of the CREATE sector, as well as the Got Your Back programming for business owners. New Mexico thrived on regional tourism promotion and enjoyed early success with pocket maps of tourism trails through the region.

QUOTE FROM NEW MEXICO - "REGIONAL TOURISM IS GENERALLY CONSIDERED TO BE AN ECONOMIC DRIVER, SO STARTING WITH A TANGIBLE PRODUCT THAT SUPPORTED REGIONAL TOURISM WAS ESPECIALLY EFFECTIVE AND ATTENTION-GETTING."

QUOTE FROM NORTH CAROLINA - "THE WESPEAKWNC CAMPAIGN PROVIDED BUSINESS OWNERS AND EMPLOYEES IN THE CREATE SECTORS SECTOR SPECIFIC TRAININGS, AS WELL AS THE OPPORTUNITY TO NETWORK AND LEARN FROM ONE ANOTHER. THEY REALLY APPRECIATED AN INITIATIVE DESIGNED SPECIFICALLY TO SHOWCASE THEIR BUSINESSES AND ADDRESS THEIR SPECIFIC NEEDS."

Ask the participants to take a few minutes to consider the following:

- a. What actions might you take early on in the CREATE BRIDGES process to generate interest and activity by the RSC and regional stakeholders?
- b. Are such actions eligible for funding and easy to implement?
- c. Is there evidence to support the need for this action/these actions? Such evidence could be provided through a prior study, initial BR&E findings, or the resounding voice of the community, for example.

Keep in mind that early actions that are relevant will likely gain more support than early actions for the sake of early actions.

Record their responses on a flip chart.

Slide 20

INSTRUCTIONS


The fifth and final common recommendation by the pilot states is to create a budget that can be expended in a timely and appropriate manner by project leaders.

In the CREATE BRIDGES pilot phase, all states were required to submit budgets with a specified minimum amount dedicated to strategy implementation. (This may not be relevant in every use of the CREATE BRIDGES curriculum.) Other than strategies focused on workforce development trainings and employee incentives, both of which had been identified by the funder as allowable expenditures, pilot project leaders had to seek funder approval for any strategy proposal that fell outside of those two categories. This caused delays in strategy implementation and frustration at the local level if the ideas were not accepted. Consequently, knowing the parameters of the funding before commencing the project is integral to the success of strategy development and implementation.


In addition, policies, and processes regarding how monies could be spent resulted in some miscategorized budget items and/or denied requests. Budget modifications were thus necessitated near project end. As a result, all states now wish that their university financial controllers had been a part of the seed money discussion up front. Again, these institutional barriers will not be problematic in all cases of the use of this curriculum, but the lesson of involving whoever oversees the purse strings being involved early in the process is an important one.

Allocating the appropriate amount per budget item is also critical. Pilot states all agreed that more dollars should have been used for marketing, promotion, and communication efforts, and perhaps less dollars could have been allocated for travel (which was nearly impossible due to COVID-19) and incentives. All states also experienced some difficulties providing financial compensation to employees and were generally restricted by university policy or funder policy to offering only stipends, often in the form of VISA gift cards, as no single business could benefit from funding.

Regardless of these challenges, however, all pilot states agreed that having a significant amount of funding dedicated to strategy implementation was a major factor in the CREATE BRIDGES project success.



Mindful Budgeting



<p>a. Level of seed money; expectations regarding its use; university challenges</p> <p>b. Need more money directed towards promotion and communication</p>	<ul style="list-style-type: none"> • Strategies were not developed yet • How to properly budget for and use incentives • Institutional barriers
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"Not knowing what strategies would be identified by the region made it difficult to determine how the funding was to be spent. Use of these funds for unidentified strategies has been challenging from a university administrative perspective as well." – North Carolina

SLIDE #20

TIME: 3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 21

INSTRUCTIONS

Take a moment to thank participants and sponsors if there were any for this meeting.



Thank you!

SLIDE #21

TIME: 1 MINUTE

MATERIALS: NONE

HANDOUTS: NONE

RESOURCES

- Success Stories for Best Practices for Implementation & Sustainability
- Sample Communication Pieces
- Mountain West Roadmap Infographic—this can be used along with the success stories as an example of what can be accomplished through CREATE BRIDGES
- NC Mountain West Ripple Map—this can be used along with the success stories as an example of the impacts from CREATE BRIDGES
- NC 2021 Year End Report
- Best Practices for Implementation & Sustainability Presentation Slides
- Best Practices for Implementation & Sustainability Agenda

APPENDIX
