CREATE BRIDGES

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Module 7: Strategy Development

AUTHORS: Mercedes Fraser

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MODULE 7: STRATEGY DEVELOPMENT

OVERVIEW

Background & Overview

This module will walk you through the strategy development portion of the CREATE BRIDGES process. Strategy development is the “what now?” of CREATE BRIDGES, and it is important to both understand the data from the region as well as the capacity of the Regional Steering Committee (RSC) to develop truly actionable strategies.

Timeline: 1-2 months

Purpose:

- To review data collected from CREATE Forum perspectives, Secondary economic data, Business owner perspectives (BR&E), and Employee perspectives.
- To emphasize the importance of the data collection portion of the CREATE BRIDGES process.
- To develop actionable strategies for regions that support CREATE businesses and workforce.

Goal setting:

- Develop actionable strategies that can be accomplished in one year.

Preparation and Notes:

- Create a handout that covers key data themes from the CREATE Academy
- Be prepared to discuss an implementation timeline with the RSC
- Review Best Practices for Implementation & Sustainability, found in the Before You Begin section.

Promotion:

Will vary

Process and Format Description:

- An in-person meeting of one or more sessions is ideal
- Optional Adaptations (such as for hybrid, virtual, or online completion)

Presentation Session:

- Session Agenda
- Estimated Time to Complete Session: 2 hours
- Strategy Development Meeting Slides
- Materials Needed
  - PowerPoint presentation and projector
  - Note paper/pens for participants
  - Key Data Themes handouts
  - Large sticky notes/sheets (at least 20” X 23”)

- Markers
- Plan of Action for Strategy Development
- NM Plan of Action for Strategy Development worksheet (optional)
- Team Roles worksheet (optional)
- Data to email out before the presentation (virtual)
- Zoom or other meeting platform (virtual)
- Collaborative apps such as Zoom's Whiteboard or MentiMeter to facilitate and encourage conversation amongst team members (virtual)

Resources:

- Sign-in Sheet
- Summary Reports
- Regional Profiles
- Example Strategy Meeting_NC
- Example Strategy Meeting_IL
- Plan of Action for Strategy Development
- NM Strategic Activities and Plan of Action Worksheet
- Mountain West NC CREATE BRIDGES Strategic Plan 2022
- Oklahoma Strategy Development Meeting Invitation
- Team Roles
- Strategy Meeting Evaluation

Next steps:

- Review Best Practices for Implementation & Sustainability, found in the Before You Begin section.
- Follow-up on and track progress of intended strategies
- Develop a system for long-term support

Appendix:

BACKGROUND & OVERVIEW

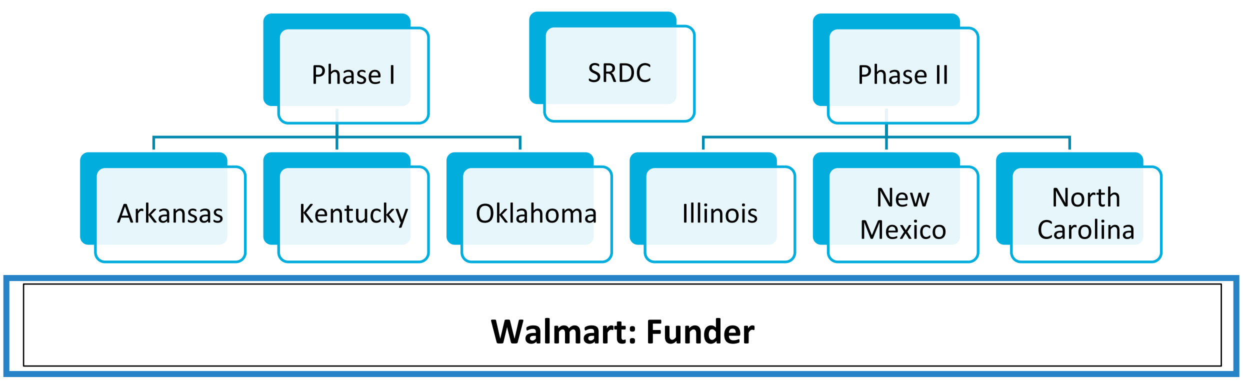
This module will walk you through the strategy development portion of the CREATE BRIDGES process. Strategy development is the "what now?" of CREATE BRIDGES, and it is important to both understand the data from the region as well as the capacity of the Regional Steering Committee (RSC) to develop truly actionable strategies.

This module includes examples of variations on meeting style (in person or virtual), an example agenda, and the presentation given to Phase II states during the pilot. Familiarize yourself with these examples and the process Phase I and Phase II states used for strategy development but remember that being flexible on the "how" might lead to more creative and community driven strategies.

After collecting and analyzing data, it is time to begin developing strategies. This is the most intimidating and rewarding aspect of this process.

Strategy development, though different in each pilot state, was derived from the same process. The data collection portion of CREATE BRIDGES (CREATE Forum perspectives, Secondary economic data, Business owner perspectives (BR&E), and Employee Perspectives survey) is what informs strategy selection and development, along with regional opportunities for action. The importance of the Regional Steering Committee (RSC) is only highlighted by this process. Having an engaged RSC that is willing to take responsibility and action is key for success in strategy development and implementation.

Project Structure:



Pilot Project Partner Institutions:

Project Coordinator

SRDC
Southern Rural Development Center

Phase I

Phase II

Special thanks to our funder

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TIMELINE

From preparation to completion, strategy development can take 1- 2 months, but will vary based on conditions specific to each region. This timeline includes reviewing the data and information collected during the CREATE Academy, getting together for a meeting, establishing strategies, and selecting "champions" or subcommittees to be responsible and implement strategies. There were different approaches for Phase I and Phase II states. Some regions separated strategy meetings into business development and workforce development, and some regions have needed multiple meetings per region due to geographic distance.

Preparation: 2 weeks

Promotion: 1 week

Presentation: 2-hour meeting

Next Steps: 2 weeks

Total: 1-2 months

PURPOSE

- To review data collected from CREATE Forum perspectives, Secondary economic data, Business owner perspectives (BR&E), and Employee perspectives (survey).
- To emphasize the importance of the data collection portion of the CREATE BRIDGES process.
- To develop actionable strategies for regions that support CREATE businesses and workforce.

GOAL SETTING

Goal setting:

- Develop actionable strategies that can be accomplished in one year.

Phase I and Phase II states found that focusing on 3-5 strategies at a time best matched the capacity of their Regional Steering Committees.

PREPARATION & NOTES

Using the data collected and analyzed at the CREATE Academy, create a handout for participants that covers key data themes for them to use while determining strategies. You can use the summary reports prepared for the CREATE Academy as a guide for highlighting just the key themes that are most relevant to strategy development. The key themes and data points were likely identified during the CREATE Academy session. These key themes and data points should serve as a reminder to Strategy Development attendees of the most relevant data and themes from the CREATE Academy. They can also serve to brief anyone who was not able to attend the CREATE Academy.

Be prepared to discuss a timeline with the RSC concerning strategy implementation. This is especially important if you plan to work in committees or subgroups.

The RSC and project coordinator should also review Best Practices for Implementation & Sustainability, found in the Before You Begin section.

PROMOTION

The meeting organizer will need to remind RSC members of the meeting details. Determining the "who" of who attends this meeting should rely on the data themes, regional focuses, and RSC feedback. For example, if the data demonstrates a gap in employment opportunities for youth, it might stand to invite local high school representatives. For an example of a Strategy Development Meeting invitation, see "Oklahoma Strategy Development Meeting Invitation" in the Appendix.

PROCESS & FORMAT DESCRIPTION

Ideally, strategy development will take place in-person. The coordinator may complete this in one meeting or more meetings may be needed.

Due to COVID-19, some states were required to conduct their strategy development meetings virtually. This is an option, and the process remains the same. Ideally, whatever virtual platform being used (Teams, Zoom, etc.) will allow users to be broken into breakout groups for discussion. North Carolina also used Padlet software to capture strategy priorities in a virtual format. Whether meeting in-person or virtually, facilitating in an engaging manner is key for any successful meeting. Example presentations provided in this module are acceptable in a virtual or an in-person format.

Strategy Development meetings begin by recapping key data, themes, and identifying opportunities for action. The RSC can then begin to prioritize focus areas, set strategies, create a plan of action, and begin taking on personal responsibilities and tasks to ensure that goals are met. Establishing clear expectations for how goals will be met and how strategies will be implemented is key for long term success. This meeting is a time to repeat those expectations and set measures for accountability. Oklahoma included some ground rules for a successful forum in their meeting slides. You can find those below.

1. Share your honest views.
2. Listen carefully and respectfully to the views of others.
3. Only one person speaks at a time.
4. Speak from your own personal perspectives or experiences rather than on behalf of others.
5. Be sure everyone at the table shares talking time equally.
6. Turn off or silence your cell phones.

The presentation includes a slide about the CREATE BRIDGES process and highlights the phase “New Strategies and Actions” as the current step. Be sure to congratulate the RSC on all their hard work making it to this stage of the process and utilize this time to highlight the importance of data collection. The presentation also touches on Data Driven Planning and how the data collected directly informs the strategies to be developed.

After recapping key data, themes, and opportunities for action from data used in the CREATE Academy, work together to develop priorities to assist in guiding the strategies to be developed. Examples from Arkansas are available in the presentation. From the priorities identified, the RSC will work to develop specific strategies to address each priority. For example, if the priority is to engage businesses by celebrating existing businesses, a strategy to meet that priority could be to develop a Shop Local Holiday guide. There can be more than one strategy for each priority. Remember that strategies should be actionable and able to complete in a year. Pilot states found that focusing 3-5 strategies at a time best matched the capacity of their RSC.

After developing strategies, work on a Plan of Action. This is the who, what, when, and where of strategy development. This is a time for the RSC and region to take agency and responsibility for the completion of strategies. Utilize current resources and delegate to strengths during this part of the process. Some states utilized Breakout rooms to sort RSC members by their strategies and allow them time to discuss and plan. This can develop momentum and excitement for strategy implementation. Once the group reconvenes consider developing a timeline for realistic expectations.

To conclude the meeting, be sure to discuss next steps, responsibilities, and schedule the next meeting.

PRESENTATION SESSION

Presentation Session:

As noted, each state conducted their strategy development meetings differently. Below you will find the presentation given to Phase II states during the pilot, as well as presentations given to regions in Phase I and Phase II states. Utilize the format to organize information specific to your region for your presentation. As a reminder, the data available to new programs will likely be different than the examples provided.

This presentation is designed to be given to the RSC, and thus their attendance would be necessary for the session. RSC members would need to set the meeting at a time when the whole team can meet. Specific invitations to other relevant stakeholders should be circulated in a timely fashion to ensure their attendance. When hoping to identify other relevant stakeholders, reflect on the one of the last questions from the CREATE Academy – *who is missing that should be involved?*

Considering how much there was to accomplish during this step of the process, many states determined to divide the meetings for various reasons.

North Carolina split strategy meetings up by themes: business strategies, workforce strategies, and community strategies. An example agenda for a virtual strategy meeting from North Carolina is below:

CREATE BRIDGES - Mountain West Region

Co-Chair Meeting Agenda

Meeting 1

Monday October 26, 2021

10:30 - 12:30 pm

1.	Welcome	10:30 - 10:35 am
2.	Brief Overview of Strategic Planning Presentation	10:35 - 10:55 am
3.	Prioritizing Strategies for Strategy Session 1	10:55 - 11:10 am
4.	Break	11:10 - 11:15 am
5.	Plan of Action Overview	11:15 - 11:20 am
	a. Breakout Rooms to Discuss Strategies	11:20 - 12:15 pm
6.	Reconvene	12:15 - 12:30 pm

An example of the presentation used in a North Carolina strategy meeting is included in the Appendix. Also, once all 3 of its strategy sessions were completed, North Carolina developed a Regional Strategic Plan that could be viewed publicly. This is also in the Appendix—the document is titled "Mountain West NC CREATE BRIDGES Strategic Plan 2022".

Other states decided to separate meetings due to time constraints. Oklahoma, Arkansas, and Illinois took this approach. Oklahoma planned to host 2 meetings. The goals of this first meeting were to debrief and discuss data, establish next steps and roles, and introduce the Plan of Action for the second meeting. As this first meeting was held in person, Oklahoma was able to have the RSC sorted by table and a facilitator was placed at each table to help guide discussion. These facilitators assisted in the process by reporting out the table's reactions to the data, 1-2 actionable items developed by the group, and then by asking "based on these actionable items identified, who needs to be invited to the next meeting?" This sort of facilitation is what was conducted in the Breakout rooms referenced in North Carolina's agenda above and could be easily recreated virtually.

The goals for the second meeting were to develop a Plan of Action, walk through the process needed to implement strategies, and establish next steps by developing a plan of work and communication. Unfortunately, this second meeting was moved to a virtual setting because of the COVID-19 pandemic. So, Oklahoma followed that initial meeting with a series of Zoom calls to continue discussing a strategic plan based on the data we had collected and identify new/emerging needs businesses had as a result of the pandemic. This huge pivot in business owner needs led to Oklahoma developing emergency strategies including webinars for business owners focusing pandemic specific needs such as online marketing, retaining customers, and safely operating under COVID restrictions.

Kentucky had to meet virtually from the beginning due to natural disasters within the service regions. Kentucky began shifting strategy focuses before the COVID-19 pandemic and continued to alter strategies to fit needs throughout the process.

New Mexico hosted multiple meetings solely due to location and the long distances between regions. They followed the same format for each meeting but had to separate them to make sure everyone who needed to be there was able to.

Regions may need more than one meeting to develop strategies, and they may need to meet more than twice should emergencies (natural disasters, pandemics, etc.) arise.

Materials Needed

In-Person Meeting

- PowerPoint presentation and projector
- Note paper/pens for participants
- Key Data Themes handouts
- Large sticky notes/sheets (at least 20" X 23")
- Markers
- Plan of Action for Strategy Development
- NM Plan of Action for Strategy Development (optional)
- Team Roles (optional)

Virtual Meeting

- PowerPoint presentation
- Data to email out before the presentation
- Zoom or other meeting platform
- Collaborative apps such as Zoom's Whiteboard or MentiMeter to facilitate and encourage conversation amongst team members

Slide 1

INSTRUCTIONS

Have this slide up when participants enter the room. As you begin the session, acknowledge the partners and sponsors/local partners.

SLIDE #1

TIME: 1 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 2

INSTRUCTIONS

Share this acknowledgment of the partnerships with CREATE BRIDGES.

SLIDE #2

TIME: 1 MINUTE

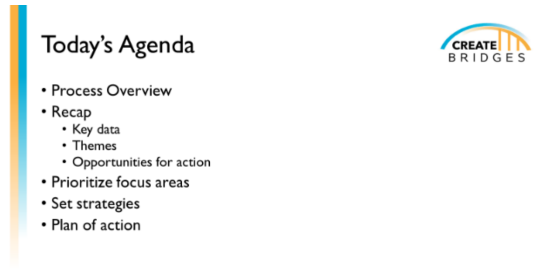
MATERIALS: NONE

HANDOUTS: NONE

Slide 3

INSTRUCTIONS

Briefly go over the agenda so that participants get a sense of what to expect from the day. Explain that the process is interactive and encourage each person to share their thoughts as the day progresses. You may also wish to add times and explain that the times are tentative as every group works at a different rate. Or you may wish to leave times off and just list the topics. Either way, having a printed agenda is not recommended as people may feel too tied to the clock.



Slide #3

Time: 2 Minutes

Materials: None

Handouts: None

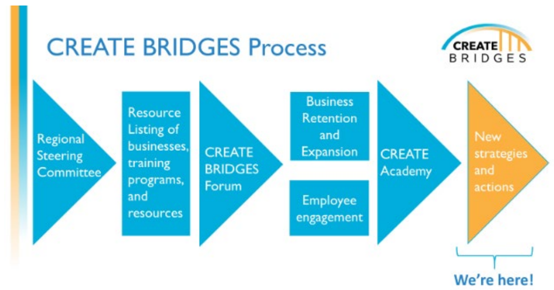
Slide 4

INSTRUCTIONS

Review the process thus far, and then highlight today's meeting.

Taking action on new strategies to support a strong business sector is the final phase of CREATE BRIDGES. During review and planning sessions, feedback from workforce participants and business collaborators will be analyzed. The RSC will brainstorm ideas to enhance and grow CREATE businesses and workforce in region. Feedback and brainstorming ideas will then be synthesized and used to identify short-, medium-, and long-term goals and strategies which will be used to develop a joint plan of action.

During this time gaps and opportunities for growth that were identified in the business retention and expansion and workforce focused phases will be taken into consideration and used to develop or adopt new, region-appropriate programs and trainings. The overall goal of this phase is to develop sustainable actions that create positive change in the local workforce and business environments and delegate tasks/responsibilities to RSC team members.



SLIDE #4

TIME: 3 MINUTES

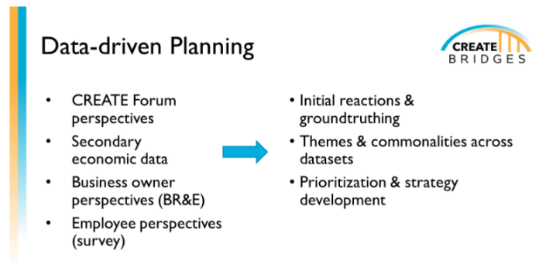
MATERIALS: NONE

HANDOUTS: NONE

Slide 5

INSTRUCTIONS

This slide is to highlight how taking the data collected during the process can be analyzed to develop solutions that can be implemented by the RSC. Because the data collection portion of the process takes a considerable amount of time, it is important to highlight how data driven planning has positive impacts on the community (creates buy in from stakeholders, provides a data bank for grant applications, etc.). Note how important the RSC is in communicating the value of data collection and data driven planning to the community.



SLIDE #5

TIME: 2 MINUTES

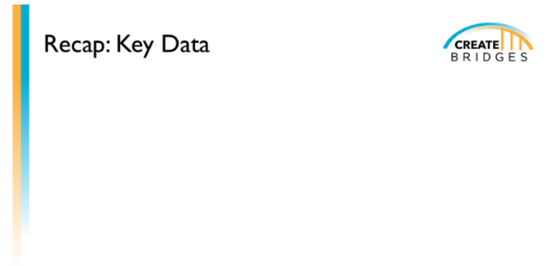
MATERIALS: NONE

HANDOUTS: NONE

Slide 6

INSTRUCTIONS

Use the following slides to insert the impact data from your state. Refer to CREATE Academy module for examples of summary reports which can be condensed into key data themes. The CREATE Academy discussion may also have highlighted specific themes or data points to include in this recap. Examples of how other states represented this data can be found in the Appendix.



SLIDE #6

TIME: 1-2 MINUTES

MATERIALS: NOTE PAPER, PENS

HANDOUTS: KEY DATA THEMES HANDOUT

Slide 7

INSTRUCTIONS

Note the key themes extracted from the collected data.

SLIDE #7

TIME: 1-2 MINUTES

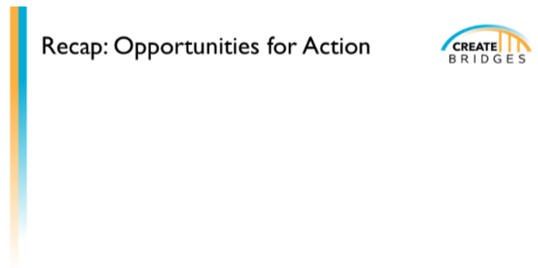
MATERIALS: NOTE PAPER, PENS

HANDOUTS: KEY DATA THEMES HANDOUT

Slide 8

INSTRUCTIONS

Discuss how the key themes from the data can be analyzed for opportunities for action. Review the opportunities for action that were identified at the CREATE Academy.



Slide #8

Time: 1-2 Minutes

Materials: Note Paper, Pens

Handouts: Key Data Themes Handout

Slide 9

INSTRUCTIONS

From the opportunities for action that were identified at the CREATE Academy, create a list of priorities. See the next slide for an example.

SLIDE #9

TIME: 5-10 MINUTES

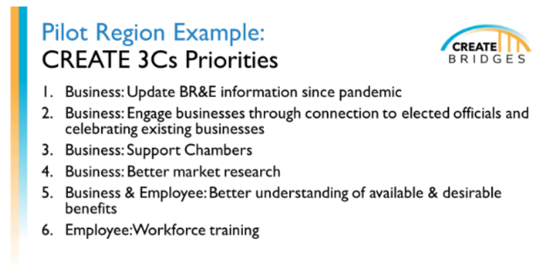
MATERIALS: NOTE PAPER, PENS

HANDOUTS: KEY DATA THEMES HANDOUT

Slide 10

INSTRUCTIONS

Review this slide as an example of priorities developed in Arkansas.



SLIDE #10

TIME: 1-2 MINUTES

MATERIALS: NOTE PAPER, PENS

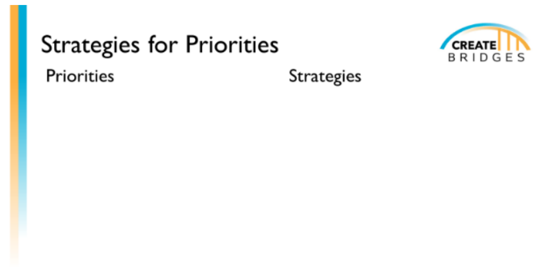
HANDOUTS: KEY DATA THEMES HANDOUT

Slide 11

INSTRUCTIONS

Thank the team for their time and input for the list of priorities created. Explain that now they will create specific strategies that match with each priority. There may be more than one strategy for each priority. See next slide for an example.

You may wish to break the team up into smaller groups and assign each group a priority to develop strategies for. Provide large sticky notes/sheets for these groups to visualize their ideas and take notes. For virtual meeting, team members can use Zoom's feature Whiteboard, where users can add sticky notes to keep track of ideas, or a similar collaborative digital whiteboard to collaborate and note ideas. This facilitation method can be completed in person or virtually.



Slide #11

Time: 30 Minutes

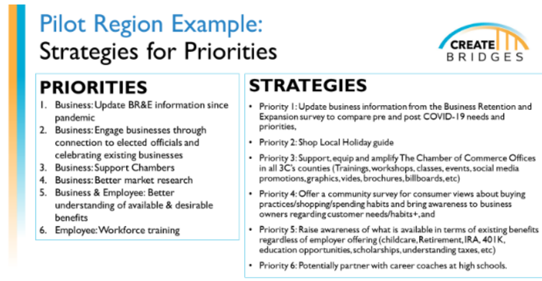
Materials: Large Sticky Notes And Markers Or Virtual Notetaking Tool (For Virtual Meetings)

Handouts: Key Data Themes Handout

Slide 12

INSTRUCTIONS

Review this slide as an example of developed strategies to address priorities developed in pilot states.



SLIDE #12

TIME: 1-2 MINUTES

MATERIALS: LARGE STICKY NOTES, MARKERS, OR VIRTUAL NOTETAKING TOOL

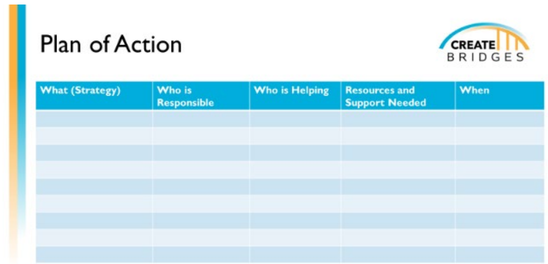
HANDOUTS: KEY DATA THEMES HANDOUT

Slide 13

INSTRUCTIONS

Utilize the table in this slide to begin delegating tasks and responsibilities to RSC members. New Mexico created a worksheet for the RSC to use when developing strategies. This worksheet, along with the worksheets (Plan of Action and Team Roles) developed by the SRDC, are available in the Resources section of the Module. The table in the presentation and the worksheet can be used interchangeably.

As the coordinator/facilitator, you may wish to use specific facilitation tools and techniques to identify strategies. Supplies needed may vary depending on the facilitation technique chosen.



SLIDE #13

TIME: 30 MINUTES

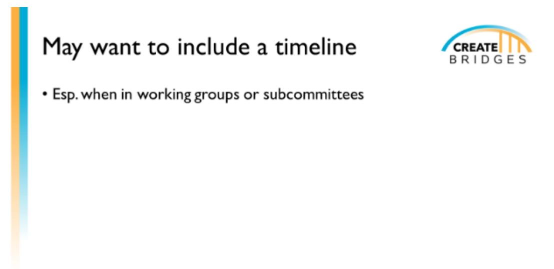
MATERIALS: LARGE STICKY NOTES, MARKERS, OR VIRTUAL NOTETAKING TOOL

HANDOUTS: PLAN OF ACTION, TEAM ROLES, NM STRATEGIC ACTIVITIES AND PLAN OF ACTION WORKSHEET (OPTIONAL)

Slide 14

INSTRUCTIONS

Creating a timeline to initiate and report on strategies might be an effective method of setting realistic expectations for RSC members.



SLIDE #14

TIME: 10 MINUTES

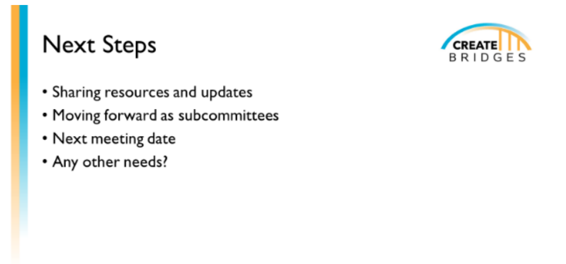
MATERIALS: WILL VARY

HANDOUTS: NONE

Slide 15

INSTRUCTIONS

This slide is for establishing a method for sharing resources and updates, such as a Dropbox folder or weekly emails. Also use this time to review next steps for working groups/subcommittees if that is how your team is implementing strategies. Be sure to schedule your next meeting while you already have the RSC together. Address any other needs.



SLIDE #15

TIME: 1-2 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

RESOURCES

- Sign-in Sheet
- Summary Reports (See the CREATE Academy module for examples of these)—these can be used as resources to develop a Key Data Themes handout
- Regional Profiles (See the CREATE Academy module for examples of these)—these can be used as resources to develop a Key Data Themes handout
- Example Strategy Meeting_NC—Example of a Strategy Development Meeting presentation from a pilot state
- Example Strategy Meeting_IL—Example of a Strategy Development Meeting presentation from a pilot state
- Plan of Action for Strategy Development—use this tool or another to organize the region's strategy development plan of action
- NM Strategic Activities and Plan of Action Worksheet—this can be used as an alternate way to organize the plan of action
- Mountain West NC CREATE BRIDGES Strategic Plan 2022
- Oklahoma Strategy Development Meeting Invitation
- Team Roles—this may be useful for organizing the plan of action and who is responsible for which tasks
- Strategy Meeting Evaluation

NEXT STEPS

Upon completion of this module, please review the Best Practices for Implementation & Sustainability, consider steps for follow-up on and progress-tracking strategies intended to be implemented, and develop a system for long-term support of selected strategies.

APPENDIX