



CREATE BRIDGES

Before You Begin: Costs & Funding

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TABLE OF CONTENTS

BEFORE YOU BEGIN: COSTS & FUNDING	2
OVERVIEW	2
BACKGROUND & OVERVIEW	3
TIMELINE.....	5
PURPOSE.....	6
GOAL SETTING	7
PREPARATION & NOTES	8
COSTS & FUNDING GUIDANCE	9
RESOURCES.....	19
NEXT STEPS.....	20
APPENDIX.....	21

BEFORE YOU BEGIN: COSTS & FUNDING

OVERVIEW

Background & Overview: This module provides background information on what this program will require of your community in personnel time, process time, and funding. This information is based off findings and experience during our 6-year pilot of the program.

Timeline: This module will be used throughout the program, but will be particularly useful at the beginning, during planning phases, and when preparing for strategies.

Purpose: During this module, the project leader will:

- Understand time needed to implement CREATE BRIDGES
- Understand what is required of the Regional Steering Committee (RSC)
- Receive a list of grant writing resources
- Will learn what resources (time, funding, personnel) are needed for process implementation and what resources are needed to implement strategies

Goal setting: Determine if your community has the resources needed and the interest in participating in the CREATE BRIDGES process.

Preparation and Notes: (as needed)

- Review this module
- Have key stakeholders review this module and provide feedback

Costs & Funding Guidance: The project coordinator should review this material and consult with other stakeholders as needed.

Resources:

- Grant Writing Resources
- Presentation for Stakeholders, Civic Groups, and Potential Funders
- Low Cost, High Impact Strategies
- RSC Responsibilities and Time Chart

Next steps: After the project coordinator and any key stakeholders have reviewed these costs and decided that the region has the capacity to implement the program, the coordinator should begin the process of selecting a region and/or building a regional steering committee.

Appendix:

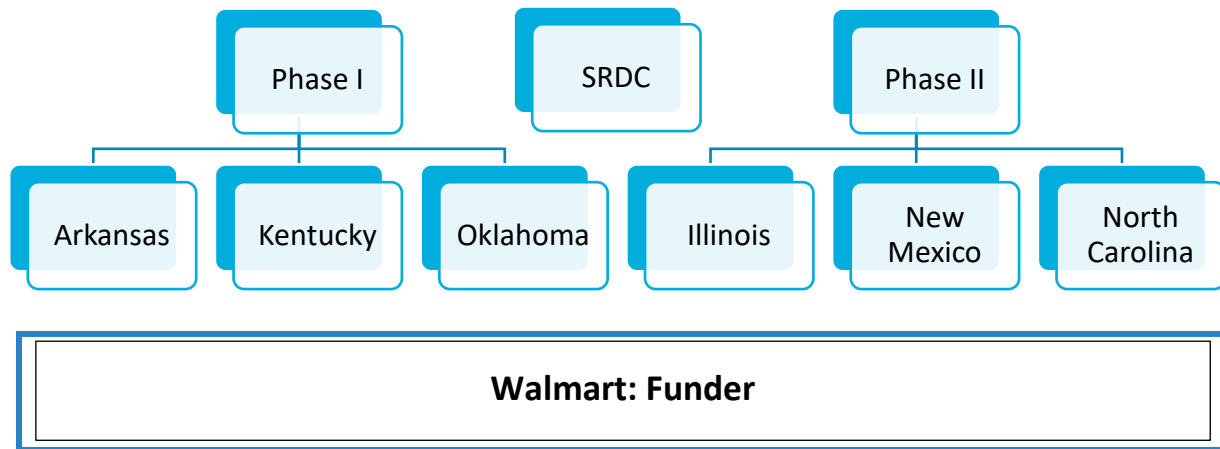
BACKGROUND & OVERVIEW

Some regions are better prepared than others to take on a project like CREATE BRIDGES. CREATE BRIDGES requires community buy-in and dedicated community volunteer-leaders.

Any program implemented in a community will come with some cost, which includes time, personnel, and funds. Our goal is that your community understand what costs are involved in CREATE BRIDGES *before* you commit to implementation.

This module will walk you through our team’s estimates of the cost to time, personnel, and funds. These estimates are gathered from six states and eight regions and averaged across our teams. It should be noted that the pilot phases of this program were funded which allowed pilot teams to fund certain key positions fully or partially. We believe the program can be successfully delivered with group of leaders who are primarily volunteers; however, we do recommend that the project coordinator position be a funded position due to the nature of time and commitment required. We also want to make sure that volunteers with the regional steering committee have a clear understanding of the time and effort this program will require of them as well. Our hope is that this module can clearly outline those expectations.

Project Structure:



Pilot Project Partner Institutions:

Project Coordinator



Phase I



**OKLAHOMA COOPERATIVE
EXTENSION SERVICE**



Phase II



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TIMELINE

This module is intended for prospective project coordinators and other key stakeholders in the region or community. Take the time you need to review the content of this module and consider if this program is a good fit for your community.

Time: Will vary as needed

PURPOSE

The purpose of this module is to provide background information on what this program will require of your community in personnel time and effort, process time, and funding. This information is based off findings and experience during our 6-year pilot of the program. This module is intended to educate potential coordinators on what it will take for a region or community to successfully implement this program over a 3-year period.

After reviewing this module, you should:

- Understand the time needed to implement CREATE BRIDGES
- Understand what is required of the Regional Steering Committee
- Receive a list of grant writing resources
- Learn what resources (time, funding, personnel) are needed for process implementation and what resources are needed to implement strategies

GOAL SETTING

Plan to have at least two key people review this module: the prospective coordinator and at least one other key stakeholder in the region or community. Consider if more stakeholders should review this module before discussing whether to move forward.

PREPARATION & NOTES

Review this module early in the process. Consider whether your region is equipped to implement the project over the course of three years.

Have other stakeholders in the region review this module—at least one other stakeholder who can consider the feasibility of the project with you.

Consider if other key stakeholders need to review the module and weigh in.

Decide if this is a project your region or community has the resources to implement—either currently possesses those resources or has the ability to obtain them (such as with funding).

COSTS & FUNDING GUIDANCE

COST OVERVIEW:

Cost includes **time**, **personnel**, and **funds**. It is important to consider all three of these elements when weighing the cost of any program.

Each type of cost for CREATE BRIDGES can also be broken into two categories: process and strategies.

Funding:

Funding costs for CREATE BRIDGES can be divided into process costs and implementation costs. Process costs included funds for salaries, travel, materials, and overhead costs. Implementation costs include those necessary to implement the strategies identified by the region.

The amount needed for both categories will vary. Salary will vary based on how many individuals and how much of their time is devoted to this project (note: at minimum one person should be expected to allocate a portion of their time to managing the project as the coordinator). Travel will vary based how the coordinator's proximity to the region, and materials and overhead costs will vary as well. Implementation costs will vary greatly as well. These costs will depend on which strategies are identified by the region, and the strategies implemented may even depend on the funds available. It is not necessary to have a major budget for strategy implementation; in fact, some of our teams' most impactful strategies were lower cost strategies. A later section of this module will highlight low cost, high impact strategies.

Personnel:

Personnel costs varied quite a bit by state; however, for both process and strategies, each state had a part-time "state lead." This person managed the project at a state level, overseeing use of funds and ensuring the project was on schedule. This person was sometimes also the project coordinator, working with the Regional Steering Committee to organize and implement the details of the program. Each state also had a Regional Steering Committee which is the group of (often) volunteers who agree to lead the project in their region. The bulk of the responsibility for organizing and implementing the program falls to this group of people which is lead by two co-chairs.

Some states also chose to use the grant funds to hire a part-time or full-time state coordinator. The state coordinator often did not live in the region but took a hands-on approach to guiding the region through the process. The state coordinator assisted the state lead with project management and was often responsible for scheduling events and training volunteers. A few states also hired regional coordinators, especially for the strategy implementation piece to make sure action was taking place in a

timely manner. Regional coordinators lived in the region and worked even more closely with the RSC to schedule events, convene subcommittees, and track progress.

Other positions that were sometimes funded include assistant state lead, a data analyst (during the process phase), and student workers.

After piloting the project in six states with eight regions, our team recognizes that this program requires one dedicated coordinator (whether that is at the state or regional level) who can keep the RSC members and the region engaged and moving forward. Our team also recommends that this person hold a paid position and can coordinate CREATE BRIDGES activities as part of that position, knowing that CREATE BRIDGES requires a significant amount of time and attention. This person will likely also need to be able to manage any funds associated with the program.

Time:

As mentioned previously, this program requires a significant amount of time, not only in the longevity of the program (3-4 years), but also the number of hours required each week to complete the activities. The amount of time varies quite a bit depending on which state of the program the region is in; however, in estimating time costs for the process piece of the project, our team looked at all the personnel involved, estimated the number of hours per week each person allocated to CREATE BRIDGES efforts, and averaged that time across the six states. On average, our team estimates that each state spent as much as 48-75 hours per week on CREATE BRIDGES efforts across all personnel involved in the project. This estimate includes paid personnel and volunteer time from RSC members and other volunteers. For strategy implementation, our team estimates that each state spent as much as 51-73 hours per week. Again, this estimate is across all team members and includes volunteer time. It should also be noted that, depending on the programmatic activities, some weeks require very little time and attention, while others require the more intensive time commitments outlined here.

PERSONNEL:

As noted above, key personnel for this project can be boiled down to the funded project coordinator—again this could be at the state or regional level—a team of invested Regional Steering Committee members and volunteers, and the partner organizations helping to carry out this program.

Project coordinator: This person is responsible for moving the project forward, for keeping the RSC members and region engaged with the program, and for managing funds. Our teams did find that a local coordinator is very helpful. Local coordinators know the community, they can build trust with volunteers, and their close proximity to the action allows for more in-person responsiveness and reduces the need for extended travel. The project coordinator is also important for the continuity of the project as local volunteers often change.

Team of invested Regional Steering Committee members and volunteers: The Regional Steering Committee is responsible for carrying out the bulk of the action for this program. The coordinator can support these efforts and help with organization and training, but this should not be a “one-person show.” The Orientation module goes into more detail on the make-up and responsibilities of the RSC. In short, this group is comprised of two co-chairs, and several other community members with expertise in fields that connect to strengthening the retail, tourism, accommodations, and entertainment sectors. This group should be diverse and representative of the community. This team will carry the work forward and determine whether the efforts and actions have long-term impacts and address the needs of the community. Other volunteers may wish to help with specific aspects of the program (such as conducting BR&E surveys) but not wish to take on the commitment of joining the RSC. These volunteers are also important to the program’s success.

Partner organizations: Each region that has implemented CREATE BRIDGES has found that partner organizations are crucial to program. Partner organizations provide insight and expertise that usually come from years of experience working to address specific issues. Partner organizations can also diffuse the costs of time, personnel, and funding when working to achieve common goals. Partner organizations will likely include both paid and volunteer personnel through their own organization’s structure.

Given the length of time the project requires, and the responsibilities required of the RSC, it is important that potential RSC members understand what will be expected of them from each step of the process. Please note that these are estimates based off our experiences with the pilot regions, and the estimates given are for the RSC as a whole. Each RSC member should expect to invest at least one hour per week in the program.

Regional Steering Committee activities, responsibilities, and time commitment estimate:

Here is a breakdown of the activities and responsibilities of the RSC as well as the estimated time for the RSC as a whole for each activity. The dates listed are target date examples from the Phase II cohort.

Year 1 Regional Steering Committee Activities	RSC Responsibilities	Time estimate (for RSC as a whole)	Date (Sample timeline)
First RSC meeting - orientation	Attend meeting	2 hours	September 30, Year 1
RSC meetings	Host regular steering committee meetings	1 hour per month	Recurring

<p>Begin resource listing assignment (RSCs)</p>	<p>Develop a list of CREATE sector businesses and workforce development organizations, programs, and resources.</p> <p>Enter these resources into the form provided.</p>	<p>5 hours</p>	<p>October 1, Year 1</p>
<p>Host CREATE Forums (RSCs)</p>	<p>Create an invitation list for the Forum</p> <p>Plan invitation methods</p> <p>Coordinate with the state coaches on a date and time for the CREATE Academy</p> <p>Logistical scheduling and set up</p> <p>Send invitations to the Forum</p> <p>Coordinate food and local sponsors if needed</p> <p>Participate in the CREATE Forum</p>	<p>1 hour</p> <p><1 hour</p> <p>1 hour</p> <p>< 1 hour</p> <p>1-2 hours</p> <p>1-2 hours</p> <p>3 hours</p>	<p>December 15, Year 1</p>

<p>Year 2 Regional Steering Committee Activities</p>	<p>RSC Responsibilities</p>	<p>Time estimate (for RSC as a whole)</p>	<p>Date</p>
<p>Conduct BR&E process</p>	<p>Recruit and train volunteers</p> <p>Recruit businesses to participate</p> <p>Conduct BR&E surveys</p>	<p>5 hours</p> <p>5 hours</p> <p>Allow at least 1.5 hours per interview or roundtable (Phases 1 and 2</p>	<p>January - March, Year 2</p>

	Analyze completed surveys	averaged 75 hours per region, with an average of 50 business surveys per region). Some of these were round tables. 10-15 business owners per roundtable. 20 hours	
Employee Perspectives surveys	Determine best methods to distribute surveys	2 hours	April - June, Year 2
	Recruit businesses to distribute among their employees	3 hours	
	Distribute Employee Perspectives surveys	2 hours	
	Analyze completed surveys	20 hours	
BR&E data and report	Review summary with key stakeholders	1 hour	June – July, Year 2
Employee Perspectives data and report	Review summary with key stakeholders	1 hour	June – July, Year 2
Continue a detailed resources list	Update the resource list as needed	1 hour/month	January – July, Year 2
CREATE Academy	Set a date and time for the CREATE Academy	1 hour	July – August, Year 2
	Logistical scheduling and set up	< 1 hour	

	Send invitations to the event	1-2 hours	
	Coordinate food and local sponsors if needed	1-2 hours	
	Participate in the CREATE Academy	2 hours	
	Homework: Review data	1-2 hours	
Strategy meeting 1: Discuss data and strategies	Coordinate a date and time for the meeting	1 hour	September 30, Year 2
	Logistical scheduling and set up	1 hour	
	Send invitations to the event (if applicable)	1 - 2 hours	
	Coordinate food and local sponsors if needed	2 hours	
	Participate in strategy meeting	2 hours	
	Perform follow-up tasks as needed	Will vary	
*Strategy meeting 2: Finalize goals and strategies	Coordinate a date and time for the meeting	1 hour	October 29, Year 2
	Logistical scheduling and set up	1 hour	
	Send invitations to the event (if applicable)	1 hour	
	Coordinate food and local sponsors if needed	2 hours	
	Participate in strategy meeting	2 hours	

	Perform follow-up tasks as needed	Will vary	
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Year 3 Regional Steering Committee Activities	RSC Responsibilities	Time estimate (for RSC as a whole)	Date
Prepare for strategy implementation (develop material, contract with partners, etc.)	Will vary	Will vary (time intensive)	January – July, Year 3
Streamline existing workforce training initiatives	Coordinate with workforce organizations and programs	Will vary (time intensive)	January – July, Year 3
Launch identified strategies (workforce, business support, other)	Responsibilities as needed— these will be carried out by small-group task forces	Will vary (time intensive)	January – July, Year 3
Gather stories from participants or conduct other evaluation methods as chosen	Follow-up with program participants to gather stories, distribute follow-up surveys, conduct Ripple Effect Mapping, etc.	Will vary	August – October, Year 3
Convene team to synthesize lessons learned	Use data and stories collected during and after implementation	3 hours	October Year 3
Share outcomes with the community and	Will vary	Will vary	November Year 3

establish long-term support for the CREATE sectors			
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*This will be covered in the Strategy Development module, but it may or may not be necessary to have a second Strategy Meeting—this will depend on what is able to be accomplished in the first meeting.

This chart is also included in this module’s appendix.

TIME:

CREATE BRIDGES reaps many rewards, but it also exacts a significant time cost. The overall process takes time (at least 3 years). The program also requires time from both paid personnel and volunteers on a monthly basis; and, at most points, the program will require 50-70 hours per week from project personnel.

Having an RSC that is fully invested will allow paid personnel to focus their time and efforts on management and administrative tasks. Having a robust RSC who share responsibilities can also alleviate the time cost.

FUNDING:

While it is true that the pilot cohorts for this project received grant funding for both the process and implementation pieces of this program, the flexibility of this program allows for it to be delivered on a much smaller budget.

- Local partners can help maximize funds through investing efforts in common goals and pooling resources. Local partners may also choose to match funds or invest some of their own funds in the program.
- There are many grant opportunities which can be sought out. These range from federal grants and state grants to local and foundational grants. Any amount of funding can help to alleviate the costs of the program. There is a brief “Grant Writing Resources” document in this module’s Appendix which provides some links to online grant writing workshop tools. These tools can be helpful to anyone who is new to grant writing or who need to brush up on those skills.
- Another way to maximize funding is by implementing lost cost, high impact strategies. Our team was often surprised that some of the most impactful strategies were not the ones with high costs attached to them. Encourage your region to think creatively and leverage assets as they address their region’s challenges.

In considering how much to budget for CREATE BRIDGES in your region, estimate the following:



- The amount of personnel time and salary that will be devoted to the program
- Total travel costs to the region—the coordinator should plan at least 12 in-person trips to the region. It is possible that more trips will be necessary. It is also possible to reduce the number of in-person trips by conducting some aspects of the program virtually.
- Materials costs—consider which materials to make available in print as well as which supplies such as flipcharts, markers, and electronic equipment will need to be purchased.
- Overhead costs—does your institution or organization have specific requirements for covering overhead costs with outside funding?

These estimates should provide a starting budget for the process portion of this program. It is difficult to estimate the strategic costs until strategies have been identified. For the pilot program, teams generally devoted one-third to one-half of the total budget to strategy implementation.

LOW COST, HIGH IMPACT STRATEGIES:

- Regional map printing and distribution
 - These included pocket maps, placemat maps, and wall maps for central locations such as a local tourism center. This region had already designed the maps, but no longer had funds to print additional maps for distribution. The regional map was also hosted online for digital access.
- Collaborating with university classes
 - Some regions partnered with a senior class to create regional and business branding tools
 - Another region partnered with a business class to conduct small business reviews
- Business Retention & Expansion (BR&E) surveys
 - This piece was low cost in terms of funding but higher in time cost. The time cost burden can be spread out through conducting roundtables and having volunteers conduct the surveys. Important information came from these surveys, and the process itself encouraged business owners and, in some regions, built relationships between business owners and the community members who conducted the surveys. More information on the BR&E surveys and various methods of implementation can be found in the BR&E module.
- Hosting marketing and informational webinars for small businesses
 - Local or state experts will often speak for a low fee and sometimes for free. Making use of these experts can provide small business owners with needed skills and information.
 - Several regions hosted marketing webinars.
 - Some regions hosted panel to educate on state and local resources.
- Podcast

- This strategy requires more time but very little funding to cover the cost of the platform. Two regions benefited from this strategy, and the podcast had consistent engagement throughout its lifespan.
- Hands-on retail and tourism specific curriculum/training (for employees).
 - See what free or low-cost trainings and curricula exist in your state--Extension may have a free version already and state tourism boards can help with tourism training.
- Work with existing entities—fill gaps and leverage existing assets
 - Use the resource listing (community college, SBDC, workforce board, regional tourism bureau) to put the right partners in place and look at how to fill gaps and leverage existing assets; resources that can connect with colleges and universities are especially helpful.
- High School Field Trip
 - One region hosted what they called “Career Cafés” in partnership with local businesses and high schools. Students were taken to local businesses for field trips to have a behind-the-scenes look at what it would be like to work in one of these sectors. Students visited a local theater, restaurants, local retail store, etc.
- Customer courtesy campaign
 - One region conducted a customer courtesy campaign for the height of their tourism season to remind customers to be polite to frontline employees who often cannot control frustrating circumstances such as long lines or inclement weather. This was a very low-cost strategy as it only required the creation of a fairly basic flyer and the cost of printing those flyers.
- Downtown shop local field trip for students
 - This was a partnership with local businesses and the school district. Elementary school students were transported to key tourism areas in their region (such as downtown) and educated on the local restaurants, retail, and tourism opportunities in the area as well as how supporting local businesses benefits the community as a whole.
- Window design project with students for local businesses
 - This was another partnership with local business and the school district. Students submitted window designs for local businesses which were then displayed by those businesses.

These are examples from the pilot cohorts of strategies that were both low cost in terms of funding and/or time and that also had a high impact in the community. A separate document listing these strategies is included in the Appendix.

RESOURCES

- Grant Writing Resources
- Presentation for Stakeholders, Civic Groups, and Potential Funders
 - This PowerPoint presentation can be delivered to stakeholders to help determine if this program is a good fit to the region, civic groups who may be interested in assisting, and potential funders who would want an overview of the costs associated with the program. You may need to adapt this presentation for different audiences.
- Low Cost, High Impact Strategies
- RSC Responsibilities and Time Chart

NEXT STEPS

Discuss with at least one other key stakeholder to determine if this is the right time and place for this program.

If you have already selected a region or community:

1. After reviewing this module, you should consider your region or community's capacity, how the goals of the program fit with the needs of your region or community.
2. Begin regional steering committee selection and review the Orientation module and steering committee responsibilities.

If you have not already selected a region or community:

1. Keep these costs in mind as you review applications. Inform interested regions/communities of the time, effort, and costs involved.
2. Review the Orientation module which also contains a section on Region Selection and Building a Regional Steering Committee.
3. Issue a call for applications for the program, providing potential regions with estimates of the time, effort, and costs involved as well as guidelines for the Regional Steering Committee.
4. Establish a team for reviewing applications.

APPENDIX
