Stronger Economies Together

Doing Better Together

Session 1: SET Overview and Exploration of Regional Data

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SESSION 1:
SET OVERVIEW AND EXPLORATION OF REGIONAL DATA

OVERVIEW
Purpose: During this session, participants will:
- Gain a better understanding of the overarching purpose of SET
- Review the findings of the civic forum
- Explore preliminary regional economic data

Estimated Time to Complete: 4 hours

Materials Needed:
- Nametags
- Name tents
- Sign in sheets
- Flip charts
- Markers

Handouts:
- SET Overview
- High Quality Plan Guidance
- Data SnapShot, divided (Sections 1-4) (Section 5)
- Civic Forum Summary, produced from Civic Forum charts – the regional team should have one summary for each round of the forum
- SET Data Scavenger Hunt
- Industry Data: Key Definitions
Have this slide up when participants arrive.

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

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

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

Allow time for everyone to introduce him/herself to the full group (name & county).
SLIDE 2
INSTRUCTIONS

Goal: Define the purpose of the session

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

Ask if anything else should be added to the agenda. If so, place the item on the chart and address it at the appropriate time.

SLIDE #2
TIME: 3 MINUTES
SUPPLIES: FLIP CHART AND MARKERS
HANDOUTS: NONE
Goal: Help the group understand that they are part of a very large initiative.

Share the SET Overview with participants.

The map identifies the states that are now part of the SET initiative. Solid blue states were part of a previous phase of SET:

- Phase 1 2009
- Phase II 2010
- Phase III 2012
- Phase IV 2013

Phase V includes 13 states (striped).
INSTRUCTIONS

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

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

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

The process is designed to support collaboration among the stakeholders for the purpose of finding the distinct advantages they have as a region and to design economic activities that will position the region to effectively compete in multi-state, national and/or international markets.
Goal: Set the expectation of writing a High Quality Plan and establish expectation that the group will have responsibility of writing the plan with a segment being developed at each session.

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

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

- **Evidence-based**: The plan builds on the region’s economic strengths – including its current and emerging economic clusters (if any), a clear understanding of the demographics of the region, and other relevant assets.

- **Practical**: The plan is logical and clear, has a well-developed timeline, indicates who is responsible for carrying out the various components of the plan, and indicates outcomes to be achieved over the short, medium, and long-term basis. Additionally, the plan is focused on a manageable set of realistic goals.

- **Broadly Supported**: Having support of a wide range of people, governments, and community-based organizations is essential for the plan. Not only is it important to have a plan that is supported by economic development and local government leaders, but also one that has buy-in from people representing the region’s education, health, business, faith-based, and nonprofit sectors, as well as key demographic groups.

- **Focused on Regional Economic Development**: The central focus of the plan must be on strategies that directly or indirectly advance regional economic development. That is, the economic development blueprint must be designed to benefit the economy of the whole region rather than a single community, county or sub-area of the region.

- **Aligned with the Region’s Goals**: The plan must be connected and consistent with the regional goals the team has developed.
Goal: Provide a brief overview of the SET goals and process.

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INSTRUCTIONS

Goal: to create a “Charter of Expectations”

Ask the group what guidelines they would like to use in holding these discussions . . . What would be the Guiding Principles? Expectations of the participants? Expectations of the Coaches?

Here are a few sample ideas:

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

Capture responses on a flip chart that will then be displayed at each session. [Note: it may also be helpful to print the final list on table tents to display during subsequent meetings.]

One option may be to begin with a list (such as above) and asking the group which of the listed items would they like to keep, change, delete, or add. It makes this very important process a little bit faster. But, if a group needs time to build rapport and establish a stronger foundation of trust, take the time now to discuss how this group wants to work together.

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

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

Provide participants with copies of the portion of the Data SnapShot that was used in the forum. Also, provide summaries from the civic forum to include:

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

Four key topics were discussed during the round table.

• Region’s strengths
• Region’s challenges
• Regional data
• Potential opportunities moving forward

You will want to have a summary from session one and, if possible, the flip charts created during that session.

Lead the full group through a review of the summaries of each round.

Allow time for clarification of each round.

Once the summary is complete, ask participants to consider any personal reflections such as:

• What else should be added to each round?
• What themes seem to be emerging from the overall discussion?
• Any other observations or clarifications to be considered?

[Note that more in depth discussions of the economic data will be coming up shortly, but that the demographic data forms a region’s foundation.]
Goal: To prepare for transition into new data.

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

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

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

Create an inventory of the thriving industries in region from the local knowledge in the room.

List these on a Flip Chart that is designed like the SET Data Scavenger Hunt handout.

Notes:
Estimating the number of employees gets them ready to talk about the Establishments data.

Putting the businesses into “types” gets them ready to talk about the NAICS codes.
Create a list of the top skills used in region on a flip chart page.

Once these lists (industries and skills) are complete, ask regions to identify:
• Industries they think are the largest in the region (place a star beside these)
• Industries they think have seen the greatest increase in jobs in the region (place an UP arrow by these)
• Industries they think have seen the greatest loss in jobs in the region (place a DOWN arrow by these)
Goal: To begin the discussion on economic data

Provide Industry Cluster Definitions as an explanation of terms.

SLIDE #12
TIME: 1 MINUTE
SUPPLIES: NONE

HANDOUTS: INDUSTRY DATA KEY DEFINITIONS (HANDOUT 6)
REGIONAL DATA SNAPSHOT – SECTION 5
INDUSTRY AND OCCUPATION (HANDOUT 3)
**Goal:** To introduce a discussion on establishments in the region

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

**NOTE:** An establishment is a physical business location. Branches, standalones and headquarters are all considered types of establishments.
Goal: To examine the sizes of businesses in the region.

Ask small groups to identify

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

**Questions:**
- What size businesses have shaped the region’s economic growth in the last 10 years?
- Which areas are growing or declining the most?
- How might these trends shape the region’s future economic growth?
Goal: To examine establishments by number of jobs and sales.

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

SLIDE #15
TIME: 5 MINUTES
SUPPLIES: NONE
HANDOUT: REGIONAL DATA SNAPSHOT – SECTION 5 INDUSTRY AND OCCUPATION (HANDOUT 3)
Goal: To examine economic data

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

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

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

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

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

Use the data from this chart to explore some of the region’s declining industries. The guiding questions can help frame that discussion.
Goal: To transition to the exploration of industry clusters.
Goal: Begin defining key terms for industry cluster examination.

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

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

Explain the difference between vertical and horizontal clusters. Then ask the group to think of other clusters that they are familiar with or that they believe might be in their region.
Goal: To provide an example of a vertical cluster.

Here is an example of a vertical cluster.
Goal: To give an example of a horizontal cluster.

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

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

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

Note that the Manufacturing Super-cluster contains the following:

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

http://prodgis2.agriculture.purdue.edu/RD M/Industry_clusters.html#
Goal: To examine the ways clusters are classified

Use this slide and the associated handout in the Data SnapShot (Handout 3) to explain how clusters are classified.
Goal: To explore the industry clusters in the region by classification.

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

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

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

SLIDE #24

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SECTION 5 INDUSTRY AND OCCUPATION (HANDOUT 3)
Goal: Review data from the labor force section as it relates to the clusters.

In light of the exploration of clusters, ask the participants to review the data in section 4 of the Data SnapShot.

Ask the groups to identify the trends in unemployment in your region?
- people commuting into the region or commuting out of the region
- earnings comparison to the rest of state or nation

Is the region competitive?

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SECTION 5 INDUSTRY AND OCCUPATION (HANDOUT 3)
Goal: To examine the top five regional occupations related to the clusters

Ask the participants to consider the questions on the slide.

Are these 5 occupations considered a cluster?
Goal: To examine the specific niche of Science, Technology, Engineering & Math (STEM) jobs.

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

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

SLIDE #27

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUT: REGIONAL DATA SNAPSHOT – SECTION 5 INDUSTRY AND OCCUPATION (HANDOUT 3)
Goal: To select a small number (1-3 typically; no more than 5) industries to explore in depth during the next session.

Ask the group to select the industries they believe are potential regional priority clusters.

Explain that these clusters will be explored in more detail during the next session.

Where is more information needed in order to guide the planning process?

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

Who are the clusters’ leaders in the region?
• Are they on the planning team?
• If not, who will invite them?
**INSTRUCTIONS**

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

Record the new ideas and affirm the proposed regional opportunities.

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

Who will commit to inviting whom?

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**REALITY CHECK AND NEXT STEPS**

Did the data reveal:
- Any new opportunities that should be considered?
- The need to eliminate previously considered opportunities?
- New partners that need to be included in the planning process.
Goal: Prepare a written summary of the work completed in the public form and in Session I.

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

Discuss how this session is building the high quality plan – evidence based.
Goal: Gather responses from the group on the Session and what is becoming clearer to the group.

Be sure to discuss the meeting schedule for subsequent sessions.

If participants prefer to view content outside of session time, point them to the video on Understanding Bubble Charts and Shift Share Analysis.
SLIDE 32

INSTRUCTIONS

Be sure to include the coaches’ contact information