Regional Planning – Session IV

[Insert date], 3 hours

**Objectives**

* Review goals/strategies from Session III, clear up any questions or confusion
* Map resources available to support strategies
* Identify potential barriers to success (interorganizational project management, communications, etc.)
* Make an action plan for moving forward which builds on success and overcomes challenges

**Pre-Work**

* (WDB Staff + Partners Complete) a credential asset mapping for each credential in the Blueprint
  + Following the completion of the credential asset maps, review regional programs which support local residents in engaging in those programs/training opportunities that lead to relevant credentials.
  + Identify partnerships and programs that support people in entering and completing programs for those credentials.
  + Make a list of the credentials that are needed but are not supported by local activity/partners.
* Draft list of strategies (generated during Session III and in survey beforehand)

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| **Agenda Item** | **Time** | **Lead** | **Notes** |
| 1. **Welcoming Remarks**  * Convene participants * Review purpose of Regional Planning and * Frame purpose of Session IV (note if Final Session) | 10 min | Board Director or Board Chair | * Have handouts reflecting all the work to date, be prepared to orient newcomers if there are any; and update those who forgot where we are in the process. |
| 1. **Review Previous Session Content**  * Priority industries and occupations * Share draft goals for 2018, 2020, 2022 * Shared Strategies (Continuous Communication, joint accountability, other) | 20 mins | Board Director or Facilitator | * Review and ask for comments; note any comments in parking lot or notes and move on to next section |
| 1. **Review Existing Credentials and Mutually Reinforcing Activities**  * Review where credentialing capacity will be a barrier to meeting goals from asset mapping | 10 min | Board Director or Facilitator | * Credentials should use Asset Map form in Blueprint template |
| 1. **Building a Network Map**  * Show draft of status quo, strategies, and goals. * Ask participants: * Are any strategies missing? * What assets do we already have that support these strategies (associations, groups, programs, etc)? * What is missing that will help us reach our goal? * Participants work in small groups to answer these questions and fill in network map. * Share out upon completion. | 40 mins | Board Director or Facilitator | * Content generated from this portion can fill in “Mutually reinforcing activities” section. In this section, you will articulate both where your existing work supports your goals, and where you will need to make new commitments to demonstrate how each partner will work towards a common goal. |
| **Break**   * Instruct participants to sit in their sector groups upon return (workforce, education, econ dev). * During the break, identify what the big “missing” resources are (program capacity? Partnerships?) | 10 mins | All |  |
| 1. **Filling in the Missing Pieces**  * Small group discussion question: Given our “missing” resources, what mutually reinforcing activities can each sector agree to (education, economic development, and workforce) that would be supportive of the common goal? * Work in sector groups (education, econ dev, workforce) for 15 mins. * Share out with large group. | 30 mins | Board Director or Facilitator | Content generated from this portion can fill in “Mutually reinforcing activities” section. In this section, you will articulate both where your existing work supports your goals, and where you will need to make new commitments to demonstrate how each partner will work towards a common goal. |
| 1. **Action Planning**  * Using the Action Question Method, the team will build an action plan, with roles/responsibilities for each member of the team (and a timeline). | 50 mins | Board Director or Facilitator | * See “Action Question Method” explanation below for facilitator’s instructions |
| 1. **Closing Next Steps**  * Setting up the cadence of accountability: set meeting schedule for large group, and reporting assignments from the action plan. | 5 mins |  | * We recommend following the method laid out in The 4 Disciplines of execution, see attached document |

**Action Plan Facilitator’s Instructions**

This exercise is designed to get a group moving in a clear and productive direction.

**Step One: Action Questions**

Next to each of the focus areas for mutually reinforcing activities work with your large group to write one to five action-based questions. These are specific questions that clarify what *specifically* needs to be solved, researched, brainstormed, defined, created, or promoted by your team. These questions should encourage your team to think like a learning group.

Example:

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| ***Focus Area (Strategy or Mutually Reinforcing Activity)*** | ***Action Questions*** | ***Action Items*** |
| ***Develop and promote a consistent message to employers*** | How do we share information more effectively regarding work with employers? |  |
| ***Develop high performance work teams*** | How do we revitalize the team structure? |  |
| ***Improve communication and collaboration between work groups*** | How do we make it easier for information to get between work groups? |  |

**Step Two: Moving to Team Action**

For each action question identify one or two specific actions that the team can work on together.

Example:

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| ***Goal*** | ***Strategy*** | ***Action Questions*** | ***Action Items*** |
| ***Make our processes more efficient*** | ***Improve communication and collaboration between work groups*** | How do we make it easier for information to get between work groups? | * Use a project management tool * Meet more frequently * Have regular meetings between leaders of each work group to address cross-divisional concerns |

**Step Three: Prioritizing**

As a group, prioritize the action items in each category. Number one should be the action that you feel is the most productive use of your team’s energy, expertise, and time. Then decide which actions will get your team’s attention and begin your work as a team.