TIPS FOR FACILITATION OF INDUSTRY ENGAGEMENT MEETINGS

This tool provides specific, practical guidance for facilitators on how to conduct industry engagement meetings. These are proven techniques, though certainly not the only way to effectively conduct these kind of meetings. Use this exactly, or with changes you think will work best for your facilitation style.

Launch Meeting (allow two hours)

1. **Set up:** sticky wall, u-shape table arrangement, and one large felt pen plus two green, two yellow, two blue 5X8" cards per person

2. **Co-Chair remarks:** should talk about why they think it is important for the industry to come together around its own priorities before working with community partners, why they are personally passionate about the potential for the industry, and how they expect this effort to produce action. (15 minutes, including self-introductions and any other opening remarks)

3. **Opportunities discussion***:* what are the biggest opportunities to grow this industry in our region, what could drive growth in the next few years? For example—these are prompts pre-made on cards—it could be growing markets, new products, new technologies/processes, policy changes, or other. Start with an opportunity-driven growth agenda, not a listing of problems or issues—and do not constrain their agenda at the beginning (i.e., don't ask them what their workforce needs are). (5 minutes)

    Ask participants to write with the felt pen on the green cards their top two opportunities—noting that they could fall into one of the categories above or something else. Ask them to write just a few words (5 or so) to capture the essence of their idea, one idea per card, and to put their name at the bottom of the card. Tell them to raise their cards when done. Gather cards and group them on the sticky wall. Briefly characterize the results, and call on individuals to elaborate on their ideas. During the discussion, write on and post cards to capture additional ideas. Conclude by noting the great potential to grow this industry in the region (30 minutes)

4. **Requirements discussion:** What is going to be required to capitalize on these opportunities? What are the top requirements, that business and community partners need to make sure are in place, to unlock the potential growth of this industry in our region? For example—these are prompts pre-made on cards—it could be talent, infrastructure, image/marketing, business-to-business partnering, regulatory/permitting, export promotion, or other. Emphasize here that we should focus specifically on requirements that we can impact here locally, so we can take action. (5 minutes)

Ask participants to write with the felt pen on the yellow cards their top two opportunities—noting that they could fall into one of the categories above or something else. Ask them to write just a few words (5 or so) to capture the essence of their idea, one idea per card, and to put their name at the bottom of the card. Tell them to raise their cards when done. Gather cards and group them on the sticky wall. Briefly characterize the results, and call on individuals to elaborate on their ideas. During the discussion, write on an add cards to post cards to capture additional ideas. Keep condensing and reorganizing the groups of cards, constantly checking in with the group, aiming for 2-3 priorities if possible—do not encourage agenda explosion into dozens of priorities. Conclude by summarizing the top priorities (45 minutes)

5. **Call for champions:** Remind participants that this is about action and is champion-driven. If no one wants to personally help champion a priority, it is not a priority—and will be taken off the board. What does it mean to be a champion? At this stage, it means to help refine the priority area for action, to help define what success looks like and what actions could advance the priority. We will hold conference calls to define outcomes and actions for these priorities, then reconvene as a full group to discuss and refine those priorities—the steps necessary to move to an action plan. Ultimately, when you as industry champions feel that you have sufficient clarity on desired outcomes and actions, we will sync up community partners to help get the job done. (5 minutes)

   Ask participants to write with a felt pen on blue cards their name and the priority they wish to champion (they can champion more than one priority, which is why you give them two cards), and raise their card when ready. You will want to brief your co-chairs before the meeting that this is coming so that they can lead by example, filling out their cards. Make a big deal of people who sign their cards as champions, which will encourage others to join the team! When giving the instructions, ask them also to list one or more business people that they would recommend join our team—knowing now the priorities on which we are focusing. People like them—who care about their industry and the community (civic entrepreneurs), and are people that they would want to have on their "dream team" if they wanted to get something done. If everyone adds one name, you have potentially doubled the size of the group in a high-quality way. (10 minutes)

6. **Concluding comments**: remind people that there will be follow-up conference calls to flesh out the priorities for action within 30 days, and a follow-up meeting within 60 days. A summary of this meeting will be back out within a week. Co-Chairs give their final remarks, congratulating the group and sharing their optimism and enthusiasm for the next steps. (5 minutes)

Conference Calls to Refine Priorities (30-60 minutes)

1. After launch meetings, many partnerships conduct follow-up conference calls. These can be calls, or calls with a central meeting places for those who can meet face-to-face. There are two parts: first, what does success look like (i.e., tangible outcomes), and given that definition of success, what actions are required? The goal is to get greater clarity on key outcomes and actions that can be carried over for further refinement at the next face-to-face meeting. Summarize results and get it back out to champions for comment.

Follow-Up In-Person Meeting(s) (two hours)

1. This part of the process can typically take 1-2 sessions for industry to get sufficient clarity and ownership of each priority to agree to moving to an action plan with the help of community partners. Remember there will be some new participants at the second meeting (those who could not make the first meeting, those whose names were identified by those who attended the first meeting).

2. Based on the conference calls, pre-write the top outcomes and actions for each priority and post them on the sticky wall. Review the items and ask for comments and refinements, capturing them on cards and posting them. (Also put out piles of cards and pens on the tables if someone wants to fill out a card, and for later when you ask for champions again). Storyboard a series of action steps, asking the group to focus particularly on necessary first steps ("early wins") and how those lead to next steps, etc. Constantly "recap, check-in, and refine" the storyboard, getting the group to "own" the results. Move to the next priority, and repeat the process. At the end of the meeting, summarize and ask for champions again. At this point, divide into "action teams" to further refine the outcomes and actions, and to identify implementation commitments.

3. Work with your co-chairs to make the following decisions: Who should lead each action team? When is it time to bring in community partners, and who would those people be? This is a critical step and one that has to be done carefully, as we want to keep industry champions in the lead, supported by community partners. A common pitfall at this stage is that community partners will take over and industry champions will pull back. Instead, the focus has to be on defining *complementary roles* that industry and community partners must play to move forward.

Terms of Use for Next Generation Logo and Toolkit

All content in the Next Gen toolkit is free for use, with attribution. We created this toolkit because of growing demand for practical tools and guidance from practitioners and business leaders across the country looking to build authentic, business-driven partnerships. We don't make money off our materials. We share them freely in order to grow the field of Next Generation Sector Partnerships. So, seriously. Use our stuff. Here are rules we ask you to follow in return:

- Give full attribution via the intact Next Gen name and logo on all materials used and shared. The Next Gen Sector Partnership name and title and/or logo must also only be used for official Next Gen materials and shall not be used on materials created by other entities.

- Join the Next Gen Community of Practice to connect and share with other practitioners across the country. Sign up for our mailing list and send us a note at info@nextgensectorpartnerships.com to let us know you've found the Toolkit valuable. We'd appreciate knowing how you've used it.

- Consider contributing financially to the Institute of Networked Communities, the organization behind the Next Gen Community of Practice. Your donation supports the continued development of Next Gen tools and resources.

The Next Gen Sector Partnership Community of Practice is an initiative of the Institute for Networked Communities (INC), a 501(c)(3) nonprofit organization. INC's mission is to build stronger, more inclusive economies by activating public-private networks around a shared commitment to place. All rights to the Next Gen Sector Partnership toolkit content are reserved by INC.