

SRT Retrospective and Forward Planning Reflections

September 2024 SRT Meeting

Email language for SRTs to use in their agenda/communication with SRT members.....	1
Facilitation Plan.....	2
Purpose.....	2
Time allotment at meeting.....	3
Materials.....	3
Audience.....	3
When/Where.....	3
Facilitators.....	3
Agenda.....	4
5 min: Introduction to purpose and desired outcome from session.....	4
10-15 min: Retrospective questions.....	5
10-15 min: Forward planning questions and next steps.....	7
5-10 min: Prioritize key themes.....	9

Email language for SRTs to use in their agenda/communication with SRT members

Here is some language you can use. Please feel free to alter to suit your voice and SRT, and use the highlighted sections to insert your SRT's details.

The Thrive Inland SoCal community is pivoting from developing a regional economic development plan to actively supporting the plan together in our next phase of work: Phase 3. Phase 3 will focus on:

- *Enacting our Regional Economic Plan (REP) strategies together*
- *Aligning Catalyst projects with Regional Economic Plan (REP) strategies*
- *Collectively continuing to build social infrastructure and momentum to pursue our Regional Economic Plan (REP) goals beyond Thrive*

In October, SRTs will reorganize from 6 to 4 subregional tables and shift to a new organizational structure for Phase 3. As Phase 2 work closes, we would like to pause, reflect, and celebrate the work our SRT has done together over the past year! We also

need your help to plan for Phase 3 and to actively support the Regional Economic Plan we created together.

In our September SRT meeting, we will be hosting a 30-45 minute retrospective and future planning session. We want to learn together what worked well, what new lessons we learned about our region, and what practices should be continued to make future inclusive economic development planning successful. We need your support to: continue building momentum together, enact our Regional Economic Plan (REP), set short- and long-term goals, and align Catalyst projects with our plan.

Your voice matters! If you have been involved with our SRT for 6 months or longer, we need you there to reflect on the work our SRT has done and to begin thinking forward about building momentum and laying the groundwork in support of our Regional Economic Plan (REP). If you have only recently joined us in the last few months, no worries. We need your help to plan for the future!

Please note: The retrospective and forward thinking session will not include a discussion of Catalyst Funding. For all questions regarding funding, please contact Esmeralda Vazquez at: evazquez@ielaborinstitute.org

Please join us (in-person/online) on (date/time) at (place) for this important reflection and planning for the future.

High-Level Overview of Facilitation Plan

Purpose

The Thrive Inland SoCal community is pivoting from developing a Regional Economic Plan (REP) to co-creating a plan to support our REP during Phase 3. Phase 3 will focus on:

- Enacting our Regional Economic Plan strategies together
- Aligning Catalyst projects with Regional Economic Plan strategies
- Collectively continuing to build social infrastructure and momentum to pursue our Regional Economic Plan goals beyond Thrive

The purpose of this facilitated session is to give our SRT backbone organizations, chairs, and members time and voice to reflect on collective work we have conducted over the past year – and to think forward about the SRT and broader Thrive structures, practices, and participants needed to make the Thrive Inland SoCal community successful in supporting our REP.

Logistics

- Time allotment at meeting: 30-45 minutes.
- Audience: SRT backbone organization representatives, SRT chair, SRT members that have been involved for at least 6 months.
- Materials: CSE will coordinate with SRT backbone org. In person - will use whiteboard or easel sticky notes, markers, handouts. Online - will use Jamboard.

Agenda

- 5 min overview
 - Introduction to Phase 3
 - Remember community agreements and inclusive planning processes
 - Introduce Claremont Evaluation Center representatives who will be developing logic model and evaluation plan for Thrive Inland SoCal
 - Purpose of this session
 - Next Steps and use of findings from notes today
- 10-15 min: Retrospective questions
 - The activity will include writing down short responses to a set of questions that focus on what worked well and suggestions for future work
- 10-15 min: Forward planning questions and next steps
 - While referencing core components of our regional economic development plan, the activity will include writing down short responses to a set of quick questions that focus on what successful regional plan execution looks like in the long and short term, and how we can best use Thrive SRT activities in next 2 years to help move towards the vision described in our regional plan.
- 5-10 min: Prioritize key themes

Detailed Facilitation Plan

Purpose

The Thrive Inland SoCal community is pivoting from developing a Regional Economic Plan (REP) to co-creating a plan to support our REP during Phase 3. Phase 3 will focus on:

- Enacting our Regional Economic Plan strategies together
- Aligning Catalyst projects with Regional Economic Plan strategies
- Collectively continuing to build social infrastructure and momentum to pursue our Regional Economic Plan goals beyond Thrive

The purpose of this facilitated session is to give our SRT backbone organizations, chairs, and members time and voice to reflect on collective work we have conducted over the past year – and to think forward about the SRT and broader Thrive structures, practices, and participants needed to make the Thrive Inland SoCal community successful in supporting our REP.

Time allotment at meeting

30-45 minute session. For 30 minute sessions, ask fewer follow-up questions than in 45 minute sessions.

Materials

If in person, whiteboard or easel sticky notes, markers, handouts, food and drinks. If online, virtual whiteboard (Jamboard), slides of visual aids. (Retrospective work: If feasible, consider green sticklies for notes on successes and yellow stickies for recommendations for future work i.e. what worked well and what might be more effective in future.)

Audience

SRT backbone organization representatives, SRT chair, SRT members that have been involved for at least 6 months.

- Note: Backbone orgs/support staff and chairs should provide comments in the SRT session but will have an opportunity to provide additional notes in the Community of Practice meeting.
- For individuals who have been part of SRT work for at least six months, please participate in both retrospective and forward thinking work.
- For individuals new to SRTs, please participate in forward thinking work.

When/Where

Mid- to end- of September 2024. Each SRT can host in person or online discussion.

Facilitators

- West End SB - in person
 - Lead facilitator: Carolyn
 - Co-facilitator/Note taker: Jin
- High Desert - in person
 - Lead facilitator: Carolyn
 - Co-facilitator/Note taker: Luzita
- SW Riverside - hybrid, most online (Carolyn not available)
 - Lead facilitator: Kara
 - Co-facilitator/Note taker: Jin
 - Note taker: Steph, using jamboard online
- Greater Riverside - in person
 - Lead facilitator: Kara
 - Co-facilitator/Note taker: Jin
 - Note taker: Steph if hybrid for grabbing chat comments, using jamboard online
- Greater SB - in person
 - Lead facilitator: Carolyn
 - Co-facilitator/Note taker: Luzita
 - Note taker:
- Coachella - email for responses, no meeting

Agenda

5 min: Introduction to purpose and desired outcome from session

- Introduction to Phase 3
 - Enacting our Regional Economic Plan (REP) strategies together
 - Aligning Catalyst projects with Regional Economic Plan (REP) strategies
 - Collectively continuing to build social infrastructure and momentum to pursue our Regional Economic Plan (REP) goals beyond Thrive
 - October SRT restructuring from 6 to 4 subregional tables and shift to a new organizational structure with Steering Committee
- Remember community agreements and inclusive planning processes
 - Let's maintain a positive, collaborative, respectful conversation throughout the session that helps us get to a thriving future for Inland SoCal!
 - The goal for this session is to stay solution-oriented.
 - Pro – We are fortunate to be part of innovating economic development in our region and co-creating this work along with the State of California! Our inclusive process means we get to decide how we achieve our plan goals collectively.
 - Con – Because of shifts at the state level and because of the nature of inclusive processes, we need to be flexible with any changes from the state, and we need to be responsive to community input while working to move forward together.

- For clarification, this is not a conversation about Catalyst Funding. For any questions/concerns about funding, please contact Esmeralda Vazquez at: evazquez@ielaborinstitute.org
 - However, as we mentioned, for Phase 3, we will be working together to ensure that Catalyst projects align with our co-created Regional Economic Plan (REP).
- Hello and farewell
 - *(If CGU attends)* We would also like to introduce Claremont Graduate University individuals who will be observing today/working with conveners and backbone organizations. More to follow on Phase 3 work with Claremont Graduate University. The CGU team will be working with Thrive to develop a theory of change/logic model and developing an evaluation plan.
 - This session will mark CSE's final role with SRTs as of September 30. We are so grateful for working with you!
- Reflection
 - Pause, celebrate, and see ourselves in the work completed in past year
 - Understand the contributions of the SRTs to the planning process and our Regional Economic Plan (REP)
 - Provide important feedback on our work together to date
- Next Steps
 - Opportunity to provide insights on how to continue this work in inclusive and productive ways after Thrive Inland SoCal sunsets September 30, 2026.
 - Think forward about what we collectively need to do to successfully enact our Regional Economic Plan (REP), and think beyond Thrive, which ends 2026.
 - Gather recommendations on how to build momentum, set benchmarks, and achieve our goals together over the next 2 years – while also planning the next 10+ years after Thrive concludes its work.
 - This is our opportunity to take ownership of and plan the way forward for our region!
- Use of findings
 - Conveners will likely share a summary of results in the state community of practice meeting to include how Thrive conveners will take action on SRT insights
 - SRT member feedback will be considered in planning for the next phase of SRT work
 - Conveners will likely share in the equity council meeting
 - Findings will also be archived in SRT folders
 - SRT backbone orgs can use the summary of findings for their own planning
 - Process is continuously evolving - feedback is always welcomed. Send additional insights to Esme Vazquez at: evazquez@ielaborinstitute.org

10-15 min: Retrospective questions

Context: Consider the work that we have collectively engaged in over the past year. Assume you are advising the next inclusive economic development planning group on how to create a Regional Economic Plan (REP) with helpful input from community members, businesses, underrepresented populations, nonprofits, etc.

Materials: Use the list of SRT activities below as a reference and a list of various aspects of the work to keep in mind - people involved, planning the work, the scope of the work, schedules and timelines, the work products, the way people are engaged, the governance structures, communication and coordination practices. *(If feasible, consider green sticklies for notes on successes and yellow stickies for suggestions for future work.)

SRT activities for reference

- Listening sessions with youth, nonprofit leaders, business leaders, and recently incarcerated
- Breakout groups/rooms to discuss barriers to access quality jobs and solutions
- Individual interviews to discuss personal experiences

Various aspects of the work

- BCL and CAC outreach committee events (art walk, small business leaders)
- 3 phases of work (Phase 1 - baseline research and initial outreach, Phase 2 - drafting of REP, Phase 3 - supporting projects aligned to REP and building social capacity and momentum)
- SRTs conducted outreach and engagement in each of the 6 subregions including having monthly meetings with community members and planned events

Task: Each of you will provide *at least* one note on: **1) what worked well/was successful** and **2) a recommendation for future work.** (1:1) Participants may provide additional notes, time permitting.

1. Who did we engage?

- a. When thinking about our goals to outreach and engage 13 affinity groups and disinvested communities, how were we successful? In future, who else should be involved and in what capacity?
- b. What worked well - who were you most successful engaging and how?
- c. What would you change - what would do differently to engage those who were harder to engage?

2. What did we learn that is new?

- a. What did we learn from this engagement that is something we didn't already know?
- b. What kind of partnerships did we create that will continue to thrive?
- c. What partnerships did we hope to build that need future support?

3. Seeing ourselves in the plan

- a. What aspects of the work were most fruitful in terms of generating the Regional Economic Plan (REP)?
 - b. What is an example of something that you would do differently to make the SRT more successful in generating a good economic development plan?
4. **What was your personal impact?**
 - a. When you think about how you personally engaged in Thrive, how and where did you feel you made an impact? What about your organization?
5. **What was our collective impact?**
 - a. Now thinking collectively, if we could do it all again, what would we do differently?
 - b. In terms of collective impact, how were we collectively successful – what has shifted, what partnerships or organizations have connected, and/or what lessons have we learned about our region together?

10-15 min: Forward planning questions and next steps

We are now shifting from creating a plan to supporting the plan. Consider the work ahead that is required to pursue our Regional Economic Plan (REP) over the next few years.

Context: Introduce the Thrive Inland SoCal new structure and purpose of the SRT's work. Remind people about the core components of the Regional Economic Plan (REP). Set framework of discussion for realizing the plan over the next 10 years. What does success look like? How do we best use Thrive SRT activities in next 2 years to help move towards the vision in the plan?

Materials: Stickies

Task: For this question, each of you will be **provided with 4 stickies, one for each category**. Please think about immediate next steps as well as short- and long-term goals. Please reflect on Phase 3 goals:

- *Enacting our Regional Economic Plan strategies together*
- *Aligning Catalyst projects with Regional Economic Plan strategies*
- *Collectively continuing to build social infrastructure and momentum to pursue our Regional Economic Plan plan goals beyond Thrive*

1. Envisioning our future

- a. Think about our regional economy 10+ years from now:
 - i. Envision successful implementation of our Regional Economic Plan (REP) in 2034. What has happened? Please consider economic, social, and environmental impacts.
 1. What kinds of new promising/family-sustaining jobs exist? In which industries?
 2. What kinds of projects did we implement to help establish and grow those jobs?

3. What kind of progress have we made in terms of our economic mobility and our wealth building strategies?
4. What kinds of collective or cooperative social and organizational infrastructure solutions did we develop?

2. Roadmap to success

- a. Think about the next 2 years, October 2024 through the end of Thrive funding in September 2026:
 - i. If we are planning beyond Thrive, how do we define SRT success in 6 months, 1 year, 2 years?
 1. What are some barriers to laying the groundwork for developing REP industries, projects, and jobs?
 2. How do we begin to (a) address our economic mobility and wealth building strategies and (b) attract/create family-sustaining jobs in REP high priority industries?
 3. What kinds of round 2 and 3 Catalyst projects would most align with our Regional Economic Plan (REP)?
 - a. Project criteria - early phase ideas, ready for investment as jobs are being created, ready to begin development

3. Building momentum together

- a. Think about our 13 affinity groups and how we should work together to achieve that 2-year roadmap and that 10-year vision:
 - i. How can SRTs actively support the Regional Economic Plan (REP) beyond CA Jobs First and Thrive Inland SoCal to help achieve the long-term goal of an inclusive, sustainable economy? What specific initiatives or actions should be prioritized to bring change-makers from the 13 affinity groups together?
 - ii. Given the focus of the regional plan, who can help bridge gaps and enact the changes we have prioritized and what activities/structures would effectively bring them together? What key roles, sectors, and expertise should be represented on our SRT steering committees, and how will each contribute to executing the Regional Economic Plan (REP) effectively?
 - iii. What specific guidance, resources, or support do SRTs need from the conveners and IPC to effectively execute their part of the Regional Economic Plan (REP)?
 - iv. What obstacles might we need to overcome and how might we stay proactive, productive, inclusive, and motivated? *(Skip if short on time)*

4. Staying involved

- a. How do you envision your personal and organizational role in contributing to the next phase of the Regional Economic Plan (REP)?
 - i. What specific actions or initiatives will you prioritize?
 - ii. What is the next thing (a) you and (b) your org will do to contribute to enacting the REP?
 - iii. What part of the plan will you commit to championing?

5-10 min: Prioritize key themes

We will now ask you to read through all of the forward planning recommendations provided by us all and rank your top 3 recommendations.

Materials: SRTs might provide members with star stickers, color dots, or heart stickers for the 3 recommendations. Alternatively, you might ask attendees to use small stickies and rank them (1, 2, 3).

Task: Of the forward planning items identified, which are your top 3 recommendations? **Please select your top three choices for next steps.**