

# Request for Applications to Participate in a Policy Academy: Aligning State and Regional Economic Development Strategies and Actions

## Overview and Important Information

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**Seeking Applicants Who Will Benefit from Technical Assistance:** State & Regional Economic Development Leaders Who Wish to Improve Their Strategic Collaboration

**Application Deadline:** February 17, 2023

**Selection Announcement:** March 1, 2023

**Period of Performance:** April 1, 2023 – January 31, 2024

*With 36 gubernatorial elections in late 2022, many states are reevaluating their post-pandemic economic development plans. State agencies, EDDs, and other regional organizations must work more closely together to develop and execute the best policies for their citizens.*

### Summary

Strategic alignment and collaboration among state and regional organizations can boost the success of economic development initiatives. With billions being spent on economic development at the Federal, state, and regional level, this **Policy Academy** is an opportunity for states, economic development districts and other key stakeholders to improve respective returns on investment (ROI) with enhanced economic development outcomes and overall higher economic performance.

This Policy Academy process invites is a collaborative learning environment in which teams from a state come together to work on a problem with free external facilitation support. The teams work at their own pace and with teams from other states going through the same process, learning from peers and experts. Participants come together to examine state/local relationship opportunities, educate stakeholders on the value of strategic alignment, and receive technical assistance. These activities will increase collaboration and co-investment strategies which will generate more impactful, coordinated, and collaborative program implementation. This approach will result in better policy and program outcomes for both states and regional partners, fueling improved economic and social performances.

To achieve these higher levels of performance, we will work with you to customize the Policy Academy process for your state's team and develop proposed outcomes that build upon your current efforts by:

- 1) Generating ideas about how to improve the impact of your existing collaborative approaches;
- 2) Providing access to national subject matter experts; and,
- 3) Creating a mechanism to deliberate on ideas with peers from other states.

The engagement will be multi-faceted with in-person and virtual meetings:

- Two in-person meetings and one virtual meeting with peers from other states and regions guided by the facilitation team;
- Two site visits and occasional virtual visits by facilitators to coordinate planning initiatives;
- Monthly facilitator conference calls with all team leaders to discuss progress and opportunities to learn from each other's experiences; and
- Ongoing technical assistance such as webinars, consultations, and background research.

Please contact Bob Isaacson <bisaacson@crec.net> with additional questions. CREC will host a conference call on January 11, 2023, at 2:00 p.m. EST to discuss this RFP and respond to any questions.

Additional background and application instruction are below.

## **Background**

The nation faces complex challenges in recovering from the economic impacts of COVID-19 and driving sustainable economic growth. A coordinated strategic effort among states, economic development districts, and other regional economic development organizations will provide the best opportunity for impactful growth and equitable economic development. For many states, the strategic planning processes at the state and regional level are not closely coordinated—often resulting in inconsistent priorities that may limit program/policy effectiveness and potentially confuse businesses, government partners, and philanthropic interests. Higher levels of alignment will benefit states by having higher levels of regional support for state investment initiatives like business development, trade, and broadband investment while EDDs will benefit by seeing key regional and local priorities reflected in state strategies.

The US Economic Development Administration invests in regional strategic planning through designated Economic Development Districts (EDDs), a network of multi-jurisdictional entities organized with local leadership. EDDs must meet regional distressed criteria and are commonly composed of multiple counties which can cross state borders. The nearly 400 EDDs<sup>1</sup> across the nation help lead a regionally driven economic development planning process that leverages the involvement of the public, private, and non-profit sectors to establish a strategic blueprint (i.e., an economic development roadmap) for regional collaboration. The strategic blueprint, known as a Comprehensive Economic Development Strategy (CEDs), provides a regional economic development plan. The CEDs process offers an opportunity for individuals, organizations, governments, and private industry to engage in a meaningful conversation about the economic direction of their region.<sup>2</sup>

Based on anecdotal information, states are aware of EDDs and their regional CEDs, but do not often actively integrate these strategies into state strategies or initiatives. At the same time, many EDDs reported their state has no statewide CEDs or equivalent strategy nor do they attempt to align their regional CEDs with the state's adopted economic development plans. State leaders reported that they rarely if ever asked to participate in the regional CEDs process or actively partner on EDA applications. These missed collaboration opportunities limit the economic impacts of government investment resulting in subpar economic performance affecting residents and employers.

EDA has engaged the [Center for Regional Economic Competitiveness](#) (CREC) and its partners ([National Association of Development Organizations Research Foundation](#), [State International Development Organizations](#), and the [American Manufacturing Communities Collaborative](#)) to research the issue, educate stakeholders, and provide technical assistance to increase collaboration and co-investment. This Policy Academy is a key element of the technical assistance and will assist states, EDDs and potentially other regional stakeholders to collaborate in ways that promote better alignment in state and regional strategies and ensure more impactful, coordinated, and collaborative implementation.

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<sup>1</sup> EDDs are known by many names including regional planning councils, development commissions, among others.

<sup>2</sup> For more information on EDDs and CEDs, please visit [www.eda.gov/edd/](http://www.eda.gov/edd/) and [www.eda.gov/ceds/](http://www.eda.gov/ceds/).

## **Purpose and Goal**

As states face long-term budget challenges, regional efforts could benefit from better leveraging the more than \$7 billion in annual state economic development expenditures across the nation.<sup>3</sup> More coordinated state and regional efforts will improve the return on investment (ROI) from state economic development expenditures while boosting regional economic performance. From a regional perspective, states may adjust focus based on regional priorities in ways that align well with EDA priorities such as recovery from economic disruption, investments in underserved areas, and resiliency against future downturns.

The purpose of the *Policy Academy on Aligning State and Regional Strategies and Actions* is to guide states, EDDs and potentially other regional entities through a process in which states and regions recognize and incorporate one another's efforts in their strategic and economic development planning (including the CEDS). With 36 state gubernatorial elections completed in late 2022, many states will be reevaluating their post-pandemic economic development plans. To that effect, we seek to encourage more state economic development agencies, EDDs, state associations of EDDs, and other regional organizations to work more closely together. Greater alignment and coordination will spur more collaborative state-regional program implementation and public investment helping to spur business activity and ultimately resident income.

The Policy Academy process will facilitate and encourage state and regional collaboration by leveraging outside facilitators and outside subject matter experts. Selected states along with partner EDDs and regional stakeholders will receive facilitation help through a robust process that will:

- Discuss current relationships and identify obstacles that impede strategic alignment and collaboration,
- Provide insights about the best approaches to addressing the identified issues,
- Create goals and a proposed action plan, and
- Begin implementing formulated policies and/or programs to improve alignment and collaboration.

## **Team Participants**

The Policy Academy process will be driven by meetings and activities involving a "Core" team and a "Home" team. The **Core** team should include up to four representatives from a state that includes the state economic development department, leaders representing EDA-recognized EDDs, or other appropriate stakeholders located in the state. This Core team will have the most direct involvement in the Policy Academy and will participate in the multi-state meetings.

The Core team participants may include:

- (1) the appointed head of or appointed member of the state economic development agency's executive management team,
- (2) a career civil servant serving in a program leadership role in the state economic development agency,
- (3) the head or member of an EDD management team representing one or more EDDs,

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<sup>3</sup> C2ER Expenditures Database at [www.c2er.org/state-economic-development-expenditures-database/](http://www.c2er.org/state-economic-development-expenditures-database/).

- (4) a program manager working with an EDD's economic development functions representing one or more EDDs, and/or
- (5) a research or convening partner, such as the director of an EDA-funded University Center.

Up to two members of the Core team (one state participant and one EDD representative) should be designated as the team lead (or co-leads). These individuals will play a leadership role throughout the process, take responsibility for managing the team's activities, and ensure the team meets its proposed goals and objectives. Team leads will participate in regular video calls with their facilitator as well as monthly calls with team leads from all participating states.

The larger **Home** team should include up to 12 additional state, EDD, or stakeholder representatives (e.g., regional partners, universities, local officials) whose input is critical for the success of state/EDD strategic collaboration. The 12-person limit is offered as guidance to help keep the size of the Home team to a manageable size for regular meetings, but the applicant has flexibility to create a Home team that is appropriate to their own context. All team members should express their willingness to commit to working together over a ten-month timeframe from about April 2023 through January 2024.

**The Core and Home teams are encouraged to include representatives from multiple EDDs and potentially include other regional development organizations, and other stakeholder groups including state EDD associations and EDA-funded [University Centers](#).**

### **Project Activities**

The Policy Academy process will involve the following activities:

1. **Cohort Meetings:** All **Core** teams will convene as a group three times during the ten-month Policy Academy – twice in Washington, DC and once virtually. Each meeting will offer an opportunity for learning and information exchange. The meetings will provide a balance of access to policy experts, dedicated state/EDD team time for discussing issues and making decisions about next steps, and issue-specific, facilitated peer-to-peer exchanges:
  - The first meeting will be an orientation and will occur in the Washington, DC area in April 2023. At this meeting, **Core** team participants will be introduced to the Policy Academy process as well as the policy framework for strategic alignment. The teams will have an opportunity to meet with other state's core teams and to clarify their respective goals.
  - The second **Core** team meeting will be in the Washington, DC area at the mid-point of the Policy Academy (tentatively in September 2023) to review the progress made in refining and implementing the state team's action plan. The mid-point meeting provides an opportunity for states to hear from experts on topics identified as challenges or opportunities across the participating states and to exchange information and ideas for policy change with the other participating states.
  - A final virtual **Core** team meeting will be held in January 2024 and will provide an opportunity for states and EDDs to share their accomplishments and celebrate their successes. The meeting will also provide access to additional expertise to overcome any barriers to implementation they may have encountered.

2. **Team Strategic Planning Meetings:** Each cohort will also be matched with a lead facilitator selected from the CREC team who help with meeting management, provide access to subject matter expertise, monitor the team’s progress, and ensure that the team benefits from the national network offered through the Policy Academy process. Each state’s facilitator will conduct two site visits to meet with the **Home** team (separate from the Core team meetings) at some point during the ten-month Policy Academy process. The goal of these site visits will be to lead the state’s **Home** team through an action planning discussion that starts with the specific challenges or opportunities identified in each state and results in an implementation plan to improve strategic alignment and collaboration.

The primary purpose of site visits will be to engage the **Home** team in action planning and implementation monitoring. There may be some variation in the format of site visits depending on each team’s plan – other possibilities would include facilitating a broader session of external stakeholders for input, bringing a subject matter expert to the state for dedicated technical assistance; or facilitating “**Core** team” planning sessions.

3. **Ongoing Technical Assistance:** The CREC team will coordinate technical assistance to participating **Home** teams throughout the Policy Academy process. In addition to the on-site visits, on-going technical assistance may include webinars, virtual consultations, and background research. The level and type of technical assistance will depend on needs and the resources available.
4. **Team Leader Conference Calls:** Team leaders from each state/EDD **Core** team will participate in monthly conference calls throughout the Policy Academy to keep one another briefed on their work and experiences to date. These calls provide opportunities for state teams to work together on common challenges or opportunities, and to learn from each other as each state team progresses through its strategic planning process towards implementation.

### **Expected Outcomes**

The list of issues and potential actions to enhance strategic alignment and collaboration will be unique for each state and EDD team. However, at the conclusion of the Policy Academy each team should have:

- Identified regional collaborative initiatives that leverage state economic development funding and boost state outcomes,
- Generated collaboration models and policy innovations that can be replicated across the economic development ecosystem,
- Developed higher sustained levels of working relationships that transcend the project and propel conversation in other areas of program and policy collaboration,
- Connected state and regional funding for one or more EDA priorities through the collaborative planning process,
- Shared an understanding of the policy challenges facing states and EDDs as documented in the application and additional materials developed through collective conversation,
- Developed an ongoing partnership that recognizes how the EDA and the EDDs can be resources for state policy priorities and potentially assist with implementation.

## **Expenses**

To facilitate participation, CREC will cover travel and lodging expenses for up to four people (two state and two EDD or other regional representatives) to attend the two **Core** team multi-state meetings. States and EDDs may send up to four additional members (two representing the state and two representing the EDD community or stakeholder) at their own expense. CREC is unable to cover in-state travel expenses for **Home** team meetings. CREC will cover all fees and expenses for the facilitator supporting the team as part of this engagement.

## **Required Application Proposal Content and Selection Criteria**

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Successful applications will identify an issue or set of current or proposed strategic alignment initiatives as noted in the CEDS and other strategic documents that guide or will guide state, EDD, and other regional partner activities. The application should describe how the Policy Academy process will help the state and EDD either address a specific gap or capture a specific opportunity related to an alignment issue or set of issues. Preference will be given to applications that demonstrate readiness and commitment to implementing actions developed during the Policy Academy.

### **Application Proposal Content**

To apply for the Policy Academy, the application must be submitted by a state in partnership with at least one EDD (participation of multiple EDDs is encouraged). Other partners including state EDD associations and other regional organizations may be included in the joint application proposal. The application should include the following:

- A letter of application that articulates why the state and partner EDD(s) are interested in participating in the Policy Academy and what it expects to gain from the process. Letters signed by the governor and/or head of the state economic development agency and a representative group of EDD executive directors are important signs of commitment.
- A list of confirmed **Core** and **Home** team members, as described in the **Team Participants** section. Please include each team member's name, title, email address, and a short description of their ability to assist with the planned Policy Academy activities.
- **A narrative of 5 pages or less** that addresses the topics and questions posed in items 2-4 of the assessment criteria: defining issues affecting their respective state and regional competitiveness, the team's state and regional objectives for the Policy Academy process, and the team's plan for implementation. (Letters of commitment are not included in this page limit.)

Each application should outline the most significant gaps that applicants will address and the most compelling opportunities that applicants could pursue through the Policy Academy process. The proposal to strengthen the strategic alignment should focus on issues that are important to the governor, state leaders, the EDDs and other stakeholders. More important than the overarching issues is the team's commitment to improving their state and regional partners' efforts to align strategies and improve overall collaboration. Reviewers will be looking for evidence that this initiative has top-level support and will be a high priority for upcoming state and EDD policies and programs.

### **Assessment Criteria**

Proposals will be evaluated according to how well the state, EDDs, regional partners and stakeholders use narrative to address these four areas noting, but not limiting to, the following criteria:

1. Team Roles (25 points)
  - Clearly present the roles and relationships of team members.
  - Communicate a commitment to engage team members on specific issues and topics.
  - Demonstrate top-level support at the state and regional level.
  
2. Benefiting from the Policy Academy (40 points)
  - Define the challenges and issues facing the state/regional team.
  - Discuss how the Policy Academy process will help the team address challenges and issues while improving state and EDD strategic alignment and collaboration.
  
3. Outcomes Achieved (25 points)
  - Present the specific outcomes the team will achieve during the Policy Academy
  - Demonstrate how the outcomes will benefit state and regional economic performance
  
4. Application of Outcomes (10 points)
  - Present a plan to disseminate and share Policy Academy outcomes to the EDDs and state/regional stakeholders in the wider economic development ecosystem not included in the Policy Academy team.
  - Communicate how outcomes will spur additional collaboration outside the Policy Academy process.

### **Proposal Submission and Selection Process**

Using the subject line “Proposal: 2023 Policy Academy on State/EDD Alignment” please email applications in a single PDF document to Bob Isaacson [bisaacson@crec.net] by 11:59 pm on Friday, February 17, 2023. Each state/EDD application will be reviewed and scored using the Assessment Criteria. Up to six (6) teams will be selected with the expectation that the final cohort will include one Team from each [EDA region](#). Team selections are expected to be announced by Friday, March 3, 2023.

### **Contact and Conference Call**

Please contact Bob Isaacson [bisaacson@crec.net] with additional questions. CREC will host a conference call on January 11, 2023, at 2:00 p.m. EST to discuss this RFP and respond to any questions. Contact Bob Isaacson at [bisaacson@crec.net](mailto:bisaacson@crec.net) if you would like to participate using Teams video. Otherwise, the Teams audio connections are:

Call in number: 347-841-0229

Phone Conference ID: 561 144 512#

### **Funding**

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