

Final Report: Michigan Policy Academy

Executive Summary and Value proposition of the Academy

Michigan's Core Team for the inaugural Policy Academy is pleased to share this final report on the results of our collaboration. We would like to share our appreciation to the Economic Development Administration (EDA) for establishing the program and to the Center for Regional Economic Competitiveness (CREC) for their skilled facilitation and guidance that supported the work and results of the Michigan team. We would also encourage the organizers to continue the program in the future as we found true and lasting value in both the process and the outcomes.

A high-level summary of the outcomes achieved through Michigan's participation (MEDC and the three Regional Economic Development Districts in the Upper Peninsula) include:

- Clarity across the team of the synergies and opportunities that we can develop via focused collaboration – along with how we must commit to systems that facilitate that collaboration.
- A shared and documented commitment to strategic collaboration, best represented by an aligned long-term plan titled the “Superior Economic Development Strategy.”
- In addition to the documented plan, we have the desire and ability to share with colleagues and stakeholders the reasons *why* collaborative planning and engagement is a true strategic imperative.
- An engaged partnership network that supports the goals of the results of the Michigan Policy Academy – along with an outreach plan to extend the work across Michigan's full network of 14 Regional Economic Development Districts.
- Meaningful development of camaraderie and teamwork and the understanding that we are stronger when we work together on meaningful work.

Some of the most important elements that were instrumental to our team's success include:

- The skilled facilitation of Brendan Buff and Allison Ulaky from CREC. They gave us the framework we needed to do the hard work required to deliver meaningful shared results that will stand the test of time and that we can expand to the other regional economic development districts across the state.

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- The opportunities for the Core Team members to meet in person with other Academy participants as well as with the Home Team stakeholders midway through the program.
- The willingness of the leaders of Michigan's three Upper Peninsula Regional EDDs and the MEDC to commit not only a significant amount of time over the course of the program, but also to be completely open and honest about the challenges we have had in the past and the opportunities we have in the future.
- The inclusion of the Home Team as part of the program. The long-term success of the Michigan plan is absolutely dependent on a strong network of partnerships. It was a smart decision to ensure we included the many supporting stakeholders from the start.

Background/Operating Environment

Prior to participating in the Policy Academy, it is fair to say that, with the exception of certain MEDC regional prosperity staff, there was a friendly, but distant relationship between MEDC and the UP EDDs. An informal survey of MEDC colleagues showed that, while there was awareness of regional economic development districts, there were few who knew specifically what their role was in supporting economic development or who had every personally engaged with EDD staff as part of their daily work.

Michigan submitted a proposal to participate in the inaugural Policy Academy for this very reason. There was shared awareness of the need to better connect and align the state economic development planning with Regional EDD planning for mutual benefit and synergy. The opportunity offered by EDA was the perfect platform to pilot how strategic collaboration could be established, developed and eventually become the way we do economic development in Michigan.

Engagement between MEDC and regional EDDs has been inconsistent at best. In fact, one of the key reasons why MEDC invited the three EDDs in Michigan's Upper Peninsula to participate in the program was because it had the strongest ongoing relationship with the three regions.

Another reason that drove the proposal was that there is a fair amount of shared strategic focus across the three regions as well as geographic proximity. It would also be accurate to note that this region of Michigan doesn't always receive the same amount of attention from MEDC as other parts of the state due to factors such as population density. The MEDC initially took point

on drafting the initial proposal, which was then sent for input and feedback by the three regional EDDs. After all input was included, the final proposal was submitted.

Team Members and Affiliation

Michigan Core Team Participants:

1. **Matt McCauley**, Senior Vice President, Regional Prosperity, *MEDC*
2. **Dotty LaJoye**, Executive Director, *Central UP Planning & Development Regional Commission*
3. **Jeff Hagan**, Chief Executive Officer, *Eastern UP Regional Planning & Development Commission*
4. **Jerald Wuorenmaa**, Executive Director, *Western UP Planning & Development Region*

Home Team Participants:

1. **Vicki Schwab**, Managing Director, Regional Prosperity, Upper Pen., MI, *MEDC*
2. **Jennifer Tucker**: Senior Community Development Manager, *MEDC*
3. **Amy Berglund**, Director of Business Initiatives, *Invest UP*
4. **M.J. D'Smith**, Executive Director, *Michigan Association of Regions (MAR)*
5. **Debb Brunell**, Interim Chief Executive Officer, *Upper Peninsula Michigan Works!*
6. **Chris Olson**, President, *Chippewa County Economic Development Corporation*
7. **Ryan Soucy**, Senior Economic Development & Community Planner, *Central Upper Peninsula Planning & Development Regional Commission*
8. **Jeff Ratcliffe**, Executive Director, *Keweenaw Economic Development Alliance*
9. **Bob Metzger**: Strategic Engagement Director, *MEDC*

Team members identification

- The MEDC team evaluated a couple options for who on staff should participate on the Core Team. Matt McCauley was the ideal choice since he led a regional EDD prior to his current role, which gave him unique insights into both the statewide and regional EDD challenges and opportunities to enhance collaboration.
- Recruiting the Regional Core Team members was very straight forward once the three regions in Michigan's Upper Peninsula were proposed for the program. The lead executives for each organization were enthusiastic about the opportunity to enhance strategic collaboration. It should also be noted that there was already a solid, trusting

working relationship between MEDC's Vicki Schwab and the three U.P. executives that supported the opportunity.

- There were no challenges in Core Team or Home Team stakeholder participation. We believe this is due to complete consensus that the program was both worthwhile and focused on the exact right shared challenges in long-term collaboration.

Overview of Strategic Elements

As noted elsewhere in this report, the shared priorities of the group were straightforward but not necessarily easy to achieve. They required much discussion and development among the Core Team as well as a plan for gaining buy-in from their respective boards, staff and key stakeholders.

The ultimate vision for shared success can most simply be described as a sustainable long-term commitment to unifying shared economic development priorities among the three regional economic development districts in Michigan's Upper Peninsula and the Michigan Economic Development Corporation in order to achieve greater shared success in economic development across the entire region.

The goals developed to deliver the vision include:

- Official documentation that defines the shared commitment for collaboration (Resolution of Continued Commitment) and ensures engagement and understanding by boards and stakeholders and sustainability over the long term
- Creation of a shared strategic planning document titled "SEDS" (Superior Economic Development Strategy)
- Alignment of planning processes, terms, planning cycles where possible and when it serves to deliver shared success

Several initiatives have been documented in the overall action plan to bring the goals to life:

- "Resolution of Continued Commitment": A document that explains the overall goal and shared commitment to collaboration
- "Superior Economic Development Strategy": The document that aligns the long-term strategic planning documents of the Core Team

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- “Glossary of Shared Terms”: The documentation that confirms and defines terminology that is vital for clarity and taking action

Some of the steps that the group used to develop and deliver the work included:

- Focused discussion on how each organization currently develops their respective strategic planning documents and how they work with their teams and their boards
- Evaluation and prioritization of the key initiatives that can best be aligned across all organizations, followed by discussion on what needs to be documented for shared review, feedback and finalization
- Following this, typically one member of core team would develop an initial draft for review, input and feedback by the group prior to finalization
- In some cases, such as the glossary of shared terms, the group worked together to discuss and come to agreement on each definition

In many cases these steps were repetitive, painstaking and time intensive. But they were vitally important to ensure the goals were achieved. Without taking the time to go through how the work gets planned, implemented and evaluated – while also ensuring that we had absolute agreement on how we were defining all of it – we would not have achieved the shared understanding of what must be done to create alignment and sustainability.

Timeline of Michigan Team’s Activity

The meeting cadence for the Policy Academy was exactly right from Michigan’s perspective. The work being done falls into the category of “Vital/Non-Urgent” (Steven Covey) that is defined as the most important work to engage in that typically gets set aside for urgencies of the moment. Meeting highlights included:

- *CREC in-person meetings* (Arlington, VA - April 27-28, 2023; Cleveland – November 6-7, 2023): These meetings offered the opportunity to connect with other Policy Academy participants and share approaches to the work. It also offered focused collaboration time for the Core Team.
- *Home Team gathering in Marquette, MI* August 14-15, 2024: This meeting engaged the Home Team in person for the first time and allowed the Core Team to hear input that was very useful in planning.

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- *Teams meetings with CREC:* These were scheduled frequently (twice monthly and sometimes more often). The facilitation by CREC was instrumental in the success of Michigan’s outcomes from the Policy Academy. CREC did a great job of supporting the work of the Core Team without directing or pushing any specific point of view.
- *Planning sessions on specific deliverables:* This may have been the most challenging aspect of the work as it can be difficult to collaborate virtually on writing-oriented deliverables. We typically discussed the deliverables and then divided up the work to be done that was later shared with the group for feedback prior to finalization.

Confirmed and Anticipated Policy Academy Outcomes & Deliverables

Confirmed Outcomes & Deliverables

ITEM	NOTES
Superior Economic Development Strategy (SEDS)	Documented framework of alignment (SEDS) for U.P. regions that all participants created and will use to deliver on the vision for long-term shared success. Includes cadence of meetings and documents that will drive the continued, collaborative focus.
Documented Resolution of Commitment	Documented MOU-style document that confirms the long-term commitment for participants to continue the important work of the Michigan Policy Academy partners
Glossary of Terms	A deceptively simple documentation of terms that ensures all stakeholders are using the exact same definitions for terms used in CEDS and MEDC strategic plans.
Network of Implementers	Established cohort group (Core Team and Home Team) that is fully engaged and prepared to continue the work of implementation for the Upper Peninsula – and share the work across the state of Michigan.
Common CEDS template	Agreement on the terminologies and plan formats that will be used by all districts to facilitate how the individual plans can be developed, evaluated and updated across the three regions and with MEDC (where possible)

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Anticipated Outcomes & Deliverables

ITEM	NOTES
Statewide engagement	Introduction of the results to Michigan network of Regional Economic Development Districts and multiyear plan to continue the rollout of the “Michigan Policy Academy with 3-4 new districts each year going forward
Development of required resources	Review and establishment of resources that may be required to ensure successful introduction and engagement across the state. May include staff, funds, facilitation, marketing and measurement resources
Cycle of continuous improvement	Cadence of accountability that ensures an ongoing review of the planning and documentation with an expectation that the overall plan is reviewed, revised and shared out across the state on a regular basis (at least annually, but likely more often). This may result in updates to the required resources if needed
MEDC strategic planning engagement	Strategic convening to further evaluate how MEDC’s strategic planning cycles can effectively include the best practices of the Michigan Policy Academy – and support the priorities of Michigan’s Regional EDDs
IEDC award submission	Submission of the Michigan Policy Academy project to a future IEDC Excellence in Economic Development Award program (2024 or 2025)

Obstacles & Challenges We Faced

There were three challenges that the Michigan Policy Academy team worked through during the year:

1. *Terminology*: Ensuring that the Michigan participants were using the same definitions for commonly-used terms in our respective strategic planning documents was an unanticipated challenge that ended up both taking a good amount of time and achieving beneficial results.
2. *Timing*: When each Michigan organization’s strategic planning cycles fall is an issue that was recognized early on as the CEDS cycle for the three EDDs is mandated by the

EDA. Ideally, we would like to align the cycles for EDDs and MEDC in order to establish a collaborative planning process. This may not be possible in the long run, but it presents a compelling opportunity if it could be achieved. Additional targeted communication with both EDA Chicago Regional Office and D.C. will be needed to overcome this barrier.

3. *Teams*: Diving into the details of the work was certainly more difficult via Teams meetings. While we did figure out how to make it work, it would likely have been easier if we could have scheduled more “working” meetings where everyone was in the same room.

Lessons Learned Along the Way

The Michigan Policy Academy team identified three valuable “lessons learned” for our collective engagement:

1. *The work is “Simple” – but Simple is not “Easy:”* Michigan’s focus for the Policy Academy may have been one of the most mundane in its scope and goals, but it helped us establish a foundation that did not exist before. We focused on simple initiatives, but they are initiatives that have aided us in becoming stronger partners and collaborators for the future. And “simple: is not remotely the same as “easy.” The work was challenging because we all had to dive into details and discussions that required much thoughtful discussion on how we work together, how we define what the work is, what shared success looks like and how we develop meaningful measures for that success. It was hard work and rewarding work.
2. *It only works if top leadership is invested and engaged:* Frankly, we got lucky here. The three lead executives in Regions 11, 12 and 13 in the U.P. were enthusiastic about participating and understood the potential from the start. We also had Matt McCauley’s commitment to be MEDC’s lead for the Core Team, which demonstrated that we were taking this opportunity seriously and were committed as a strategic priority for the state.
3. *We must make the time for “Vital/Non-Urgent” collaboration:* There is no higher priority than productive, long-term strategic alignment and collaboration. If we all commit to making the time for shared strategic planning – which takes time to do correctly – we can achieve amazing results together. It takes time and it takes remarkable shared commitment, but it is always worth doing.

Commitment to Sustainability

As the inaugural Policy Academy concludes there is shared commitment to continue the momentum gained from Michigan's participation and to promote what has been gained with EDDs across the state. Toward that shared goal, we are moving forward with the following initiatives:

- Sharing results with the entire Michigan network of Regional Economic Development Districts and economic development stakeholder organizations: The Michigan Association of Regions supports the network of EDDs across the state and will be an ideal forum for sharing the outcomes of the Policy Academy, including the glossary of shared terms, the need for a robust cadence of collaboration and the importance of prioritizing this shared work.
- The CEO of Michigan Economic Development Corporation, Quentin Messer, Jr., has been kept updated on the progress and activities of the Michigan Policy Academy team and is supportive of its strategic importance. This report will be shared with him and other lead executives focused on economic development collaboration. He will summarize the results with Governor Whitmer's office and why it has benefited strategies that support shared prosperity, strategic collaboration and infrastructure investments.
- Working with the participating Regional Economic Development Districts, the Michigan Association of Regions and MEDC's Marketing & Communications team, we will share final results and the "playbook" for how this can be expanded across the state. The current plan is to roll this out with three to five new EDDs each year going forward, while at the same time keeping the entire Michigan network engaged via establishing a focused "Strategic Collaboration Framework:"
 - Establishment of a set of "guiding principles" that support and direct the ongoing collaboration process.
 - Proposing a cadence for coordinating regular strategic touch base meetings with structured agendas and regular reporting on the strategies, objectives and tactics, as well as creating an annual strategy dashboard that is used explicitly for measuring progress and success of the collaboration imperatives established during the Policy Academy process.



EASTERN UPPER PENINSULA
REGIONAL PLANNING & DEVELOPMENT COMMISSION



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