



B3K Strategy Phase Operations & Organizational Structure

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Strategy Phase Background and Objectives

Addressing findings from the B3K Market Assessment, the Strategy Development Phase (January - May 2021) will engage topical experts, practitioners, and community stakeholders in joint problem-solving to produce tactics with implementation plans and operational commitments.

This phase also will establish ongoing governance of the B3K effort that enables stakeholders to review and refine progress; ensure accountability; and maintain a “center of gravity” forum or platform that promotes authentic, functional collaboration in vetting and resourcing regional economic development opportunities.

Objectives for this phase include:

- Translating Market Assessment findings into tangible, realistic interventions through supplemental research and connections to promising practices.
- Establishing locally-driven process for product delivery and communications to help key stakeholders stay informed about potential strategy interventions and eventually define and share ownership of resulting strategies and initiatives.
- Determining a governance approach to strategy implementation, based on candid assessment of regional organizational capacity and resources.

Topically-focused workgroups will complete a series of tailored “assignments” that expand upon Market Assessment analysis; map capabilities and gaps; validate, adjust, or reject concepts; and research and decide interventions.

As outlined in the project process to transition from research into action and prepare for local ownership of execution, the local Project Team, Executive Committee, and Steering Committee will play expanded roles during the strategy development phase. The Project Team will drive and staff daily efforts of workgroups into production of strategy and implementation plans. Executive, Steering, and Research Committee members will participate in those workgroup problem-solving activities, and the Executive Committee will actively monitor and guide progress. Unlike the direct, visible role in managing and executing the Discovery Phase and producing final deliverables, the Brookings Advisory Team will play a more supportive facilitating function in structuring assignments, identifying information and external practices, and providing regular feedback across workgroup efforts.

Workgroup topics and organizational structure, more detailed description of committee roles, and timeline for the strategy development phase are outlined below.

Workgroup Overview and Topical Areas

Topical workgroups -- limited to five in total -- bring together 15-20 cross-sector stakeholders with expertise and experience in relevant fields and community interests, both within and outside the region. Workgroups will assess problem statements and opportunities identified in the Market Assessment; craft responses; and draft strategies and implementation plans for Executive and Steering Committee consideration and endorsement. Participants should have the knowledge and skills to address substance, and ability to represent or secure institutional backing for implementation.

Specific topics for workgroup exploration:

- 1. Energy:** Establishing Kern as a global hub for carbon management and renewable fuels production and innovation, centering on biofuels, hydrogen, and biomass; and carbon capture and sequestration testing and implementation – both for intrastate benefits, and for new technologies and processes that can be exported.
- 2. Aerospace:** Institutionalizing a deliberate, ongoing cluster initiative with industry-led expertise and a dedicated intermediary to maintain sector competitiveness and leverage more regional economic benefits, including: (i) tapping potential for smaller, high-growth firms to access existing federal R&D innovation and commercialization assets; (ii) improving the local “talent-to-industry” pipeline to grow from within through easier accessibility and greater alignment of workforce contributors; (iii) resolution of state policy issues; and (iv) cross-border collaboration to promote the Ridgecrest-to-Palmdale aerospace corridor as a globally competitive industry hub for talent and investment.
- 3. Advanced Manufacturing Subsectors:** Identifying opportunities to accelerate internal growth and attraction of manufacturing firms, focused on promising specializations (e.g. chemical, plastic, metalworking, machinery, and food), through sector-specific or sector-neutral supports. Activities may include targeted training and workforce development, access to product and process problem-solving, export promotion, infrastructure, incentives, and marketing.
- 4. "Second Office" Business Services:** Building capacity and pursuing capture of growth in remote services/outsourcing functions across industries or back-office spillover from coastal California firms, particularly developing a stronger talent base in digital skills to enhance the long-term diversification of the regional economy.
- 5. Entrepreneurship and Business Ecosystem:** Setting a formal, cohesive strategy for enabling business dynamism at various points in the firm life cycle, targeting younger, knowledge-based businesses; including basic functions such as establishing an incubator / accelerator, increasing access to capital (*not tax incentives*), and enhancing technical assistance resources; as well as targeting specific needs of women and entrepreneurs of color.

Timeline

Each workgroup will develop a specifically tailored workplan based on an overarching timeline:

- **December 2020** – Workgroup framework / operational model and topical areas of focus approved by Executive Committee.
- **January 2021** – Workgroup leads are secured for participation and potential members are recruited. End of January/early February, workgroups launch with their first organizational meeting.
- **February – April 2021** – Workgroups undertake assignments with collective and individual intermediate work, meeting as a whole at intervals determined by leads to review, discuss, and finalize responses. Executive Committee meets (likely 3 times) to review content at the end of each phase of work.
- **Early May** – Workgroup leads meet in early May to review and discuss their draft tactics, strategies and implementation plans to identify and coordinate on areas of overlap.
- **May 2021** – Workgroups present final strategies, tactics and implementation plans to Executive Committee for review and endorsement, to be integrated with a final product.

January	February	March	April	May
Workgroup Prep				
	Phase 1 - WGs meet	Phase 2 - WGs meet	Phase 3 - WGs meet	
				WG Leads meet
		EC Working Session	EC Working Session	EC Working Session
				Steering Briefing

Operations and Assignments

While workgroup members will drive the strategy development for their topical area, the process will be managed and staffed by the Project Team, augmented by County analysts. The Brookings Advisory Team will structure assignments and support delivery with research and practice guidance through frequent Project Team consult and participation in workgroups. With expectations of output adjusted for each theme, activities will progress in four stages:

- **Phase 1: Conducting Further Analysis and Prioritizing Outcomes** – review data and findings from the Market Assessment, fill gaps in baseline analysis on the topic as needed, prioritize challenges and opportunities, define problem statements and objectives, assess existing initiatives in the region to build on, and initiate collection of promising external practices.
- **Phase 2: Creating Tactics and Strategies** – identify measurable objectives and interventions to address priorities; confer with business, worker, and community stakeholders to affirm needs;

link with peer practitioners to inform activities; decide new or scaled-up programs; inventory policy issues; and produce concise strategy statements reflecting tactics and metrics.

- **Phase 3: Preparing an Implementation Plan** – define operational elements to execute each initiative, including what entity would “own” or champion each tactic going forward, the partners or resources needed to achieve success, progress measures, and timelines.
- **Post-Strategy: Securing Resource Commitments** – outreach to pursue more funding or other support required for implementation, which may require development of supplemental investment prospectus or grant proposals, anticipated to be responsibility of initiative champions and governance structures versus the original workgroup as a whole.

Throughout the process, workgroups will respond to a series of three assignments -- discussion questions and worksheets -- to guide their inquiry in each phase. Post-strategy activities of securing resource commitments will depend on the chosen interventions and governance structure.

Assignment	Activities / Goals	Outputs	Deadlines
1) Additional Review and Analysis	<ul style="list-style-type: none"> • Orient members to workgroup mandate and goals • Review and assess relevant research, existing programs/interventions, and actors in the space • Supplement analysis based on workgroup expertise and conduct additional research on outstanding questions, if necessary • Identify and prioritize the most significant challenges and opportunities 	<ul style="list-style-type: none"> • SWOT analysis • List of up to 5 priority challenges and opportunities to guide development of strategies and tactics 	March 10 - Leads present final submissions to Ex Comm for review and input
2) Strategy and Tactic Development	<ul style="list-style-type: none"> • Develop tactics by identifying existing initiatives that could be scaled or enhanced or national best practices that could be adapted to address priority challenges and opportunities • Assess ways in which challenges and opportunities unmet by existing initiatives/best practices can be addressed • Draft strategy statements based on identified tactics 	<ul style="list-style-type: none"> • Matrix listing tactics and how they address stated work group goals, priority challenges and opportunities, and what’s needed to advance them • Matrix grouping tactics by theme and laying out concise strategy statements 	<p>March 29 - Draft submission handed off to Project Team and Deep Prosperity Committee</p> <p>April 9 - Leads present final submissions to Ex Comm for review and input</p>

3) Operational Planning	<ul style="list-style-type: none"> Sort strategies and tactics by near term (potential to show results in the next 18 months to two years) or longer-term undertakings For each strategy and tactic, identify potential implementation lead, partners, resources, barriers, goals and metrics (only for near-term) Compile above into a proposed implementation plan Determine proposed policy recommendations Draft immediate next steps for Executive Committee consideration 	<ul style="list-style-type: none"> Final matrix of proposed strategies and tactics Proposed implementation plan, including metrics Proposed policy recommendations List of action items and next steps 	<p>May 3 - Workgroup leads and staff meet to identify redundancies in plans</p> <p>May 10 - Workgroup leads hand off plans to Project Team and Deep Prosperity Committee</p> <p>May 24 - Leads present final submissions to Ex Comm for review and input</p>
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After completion of each assignment, the workgroup leads will report out to the Executive Committee for feedback and assistance, connecting efforts across themes. Additionally, a Deep Prosperity (Diversity, Equity and Inclusion) Committee will confer with individual workgroups during each phase regarding consideration of demographic disparities in solutions.



The process following completion of the third assignment will vary slightly in that workgroup leads and staff will meet to present their proposed implementation plans in order to identify and reconcile areas of overlap in proposed activity, funding streams and implementation partners. Workgroup leads and staff will then adjust their implementation plans to reflect areas of overlap and then share with the Deep Prosperity Committee and Project Team for review and feedback before presenting to Executive and Steering Committees for final review and input. Once the Executive and Steering Committees have reviewed and provided input on implementation plans, workgroup leads, alongside B3K leadership, will secure commitments for implementation partners and resources.

By the end of the process, each workgroup will have produced:

- strategy statements to address prioritized outcomes;
- tactics and/or initiatives descriptions to support each strategy;
- implementation plan draft covering the first year of execution, including proposed metrics to track and assess progress;
- policy recommendations for state, local, and federal enabling action, if relevant.

Roles and Responsibilities

Project Team Role (with Core Team support)

The Project Team will serve as the overarching project management and operations hub for workgroups. This will include establishing processes and frameworks to operationalize workgroup activity, staffing execution of the strategy phase, ensuring accountability around deliverables and timeline, and ensuring communications among workgroups and other layers of B3K governance (e.g. Core Team, Executive Committee, Steering Committee).

An overall Project Manager for the Project Team will be designated, expected to dedicate 80-100 hours per month to management across the functions. The Project Manager should be empowered to assure that outputs and deadlines are achieved, adjust processes, steward relationships with B3K leaders, and confer with the Brookings Advisory Team.

Specific responsibilities include:

- Establishing timelines for workgroup activity, leading to the completion of the B3K strategy in April/May 2021, providing clear parameters and accountability for workgroup leads and staff to manage individual workgroups.
- Overseeing and supporting workgroup staff (responsibilities outlined below), in collaboration with work group leads.
 - Regularly tracking progress towards monthly assignment milestones, ensuring that each workgroup is on schedule.
 - Identifying and facilitating receipt of additional resources or assistance from the Project Team, Brookings Advisory Team, or other entities.
 - Managing any coordination or exchange between workgroups on process or substantive topics.
- Coordinating with Brookings Advisory Team on development of workgroup assignments, work plans, background docs, feedback, etc., facilitating input from Project Team and managing dissemination to work group leads/staff.
- Planning and executing regular Executive Committee briefings at the end of each phase of work, including drafting agendas, sending meeting materials, coordinating with workgroup leads to ensure they are prepared to present, sending follow-up notes and tracking next steps
- Developing and managing communications strategies to keep Steering Committee and Research Committee apprised of workgroup progress, including soliciting input as needed and scheduling final briefings at the end of the workgroup process.
- Coordinating with the Deep Prosperity Advisory Committee on engagement with workgroups, setting up committee meetings as needed, etc.

Workgroup Staff Role

Each workgroup will need individual staff support to both deliver substantive outputs and manage operations. The project team will assign staff to each workgroup to provide these functions – they could spend an aggregate of 60-100 hours per month on activities, including:

- Operations
 - Implementing an individualized workplan (based on the overall workplan) to ensure the workgroup meets key objectives on time, in collaboration with the work group lead and overall project manager.
 - Liaising with the overall project manager to provide updates on workgroup status, ask questions as needed, etc.
 - Tracking and managing workgroup tasks, assignment delivery, schedules, and logistics, with direction and input from workgroup lead, including drafting agendas; organizing meeting times, meeting requests, and material distribution; taking and consolidating notes, circulating summaries and follow-up materials; and ensuring a complete record of work products.
 - Facilitating relationships and serving as primary point of contact for workgroup members, answering questions, collecting input, and supporting the workgroup lead on issue resolution.
- Content Production
 - Collaborating with workgroup leads and Brookings Advisory Team on the development of workgroup assignments and key questions for exploration.
 - Supporting or engaging with researchers and other workgroup members in answering questions or gathering supplemental information sought by the workgroup.
 - Co-drafting or editing assignment submissions and other written products.
 - Coordinating with the Deep Prosperity Advisory Committee to gather input.

Workgroup Participants:

Workgroups should include maximum 15-20 cross-sector stakeholders with expertise and experience in relevant fields and community interests (both within and outside the region), the knowledge and skills to address substance, and ability to represent or secure institutional backing for implementation. Workgroups will meet as determined by leads from January-April to develop, review, discuss and finalize assignments. Specifically, workgroup participants are expected to:

- fully participate in all deliberations of the workgroup, attending meetings and contributing relevant expertise and insight;
- contribute, as appropriate, to specific research and exploration—including best practices inside and outside the region--of opportunities identified in the Market Assessment;
- participate in outreach and engagement with relevant networks and partners.

Executive Committee Role

The Executive Committee will perform an advisory and integrating role for the workgroups, providing substantive input during each phase of work, making connections across topic themes, identifying external resources, and ultimately endorsing final deliverables. Several Executive Committee members likely will participate in workgroups. Executive Committee responsibilities include:

- approving the Framework of workgroup topics and processes, and identifying and recruiting workgroup leads and members;
- contributing to workgroup requests for information and using networks to engage outside expertise;
- convening approximately three times to review and provide feedback on workgroup assignment submissions endorsing final strategies and implementation plans.

Workgroup Leads

Recruited by the Executive Committee, workgroup leads should have expertise, credibility, and visibility in relevant fields. Typically, there are two leads per workgroup to provide balanced perspective and share the workload; however, leads with senior profile often have constraints on their time, so may assign other staff from their organization to serve on the workgroup and act as their proxy in daily efforts. In aggregate, a lead and proxy may spend 25-30 hours a month on meetings, content development, and product reviews:

- setting and refining the workgroup agenda off a suggested base from the Project and Brookings Advisory Teams;
- convening the workgroup and leading sessions, preparing for meetings with staff, etc.;
- collecting and vetting inputs to assignments, and co-drafting or editing final products;
- coordinating with other workgroup leads to ensure that strategies are complementary and not conflicting and maximizing synergies across workgroups;
- communicating outputs on behalf of the workgroup to Executive Committee and Steering Committee at each phase;
- owning the assembly of workgroup strategies and implementation plans into a cohesive final product for approval by Executive Committee and input from Steering Committee;
- representing the workgroup externally with regional, state, and national principals and media, either to secure input and involvement, communicate content, and seek implementation commitments;
- maintaining some presence in overall B3K governance into execution phase.

Deep Prosperity Advisory Committee (Diversity, Equity and Inclusion)

Reporting to the Executive Committee, this 5-8 member committee will help workgroups ensure consideration of whether strategies and tactics address challenges identified in the data around access to economic opportunity for all residents, particularly disparities in race and gender; as well as for other policy preferences related to the impact on communities and County-wide geographic considerations. Specifically, committee members will lend this perspective through:

- conferring with workgroups throughout the strategy development process to reflect on and suggest options when drafting strategies and tactics;
- meeting with the workgroup at the end of each phase to review outputs and gauge consideration, perhaps via a scorecard showing how issues were vetted and addressed;
- providing input on implementation and governance models, in particular to ensure B3K leadership going forward is representative of the community.