**Inclusive Economic Indicators Lab Assignment Activities**

Throughout the Lab, Brookings Metro engaged the participating core teams in “assignments” to support their progress toward a successful indicators project. Those activities are aggregated here and organized within the three phases of an economic indicators project, as outlined in the report, [*A roadmap to developing inclusive regional economic indicators*](https://www.brookings.edu/research/a-roadmap-to-developing-inclusive-regional-economic-indicators/). Because much of our work with the IEI Lab teams focused on work in the first two phases, the activities included here primarily fall within Phase 1 and Phase 2.

This document aims to provide broad guidance around the questions for core organizations to explore in each phase and activities to do so. This is not an exhaustive catalog of the appropriate activities nor an instructional manual, but rather a set of tools core organizations may use as best fits their project.

**Phase 1 – Set the conditions for success**

Undertaking a process to measure inclusive growth can help a region’s leaders better define their desired outcomes and deepen collective commitment to pursuing them. But gaining a shared understanding ahead of the measurement process on whatinclusive growth means, whyit’s an important vision, whomust be involved in seeding it, and what role metrics themselves will play can ensure these leaders address important questions and organize key stakeholders in ways that facilitate a high-impact project. The activities in this section are related to these efforts.

***Questions to consider and discuss***

* What are the broad outcomes that best reflect our community’s aspirations for shared economic success?
* For which groups—e.g., by income, race/ethnicity, geography—should economic inclusion be an explicit priority?
* What are the key drivers of shared economic success for our region, particularly those that local stakeholders aim to impact?
* What is the appropriate regional scale for this project—city proper, county, multi-county, or something else? Will stakeholders desire neighborhood-level data, and is that something important to capture?
* What is considered “in bounds” for consideration in the indicators project? Is your team on the same page about whether the project should measure a wide range of factors that influence economic outcomes, or focus more narrowly on traditional definitions of economic development?

***Define the ecosystem***

For an indicators project to drive real accountability and action, it needs to be designed to specifically appeal to key audiences that can influence a region’s ability to deliver strategies relevant to the goals of economic inclusion. But these key audiences may have varying levels of commitment/understanding around the goal of economic inclusion or their organization’s role in driving it.

The chart below is intended to help teams make decisions about who must be engaged from the beginning of an inclusive indicators effort. Its purpose is to encourage potentially difficult decision making about which organizations absolutely must be engaged/persuaded from the beginning, and which can be more peripheral to the initial process. Consider the following broad categories, but try to be as specific as possible within them:

* Members of/investors in EDOs (could include specific boards/committees)
* Other types of businesses (could include subcategories by size, location, ownership)
* State and local elected officials (could include suburban mayors/representatives that don’t see the importance of the core city’s success as key to their own)
* Community and workforce development organizations (could include neighborhood organizations that are skeptical of regional perspective or business-led initiatives)
* Foundations and philanthropies

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|  | Tier 1: Project team organization(s) have **control or major influence** over these organizations | Tier 2: Project team organization(s) have **very little control or influence** over these organizations |
| Category 1: E**ssential** to driving change on economic inclusion indicators | *List up to 5 organizations* | *List up to 5 organizations* |
| Category 2: Important generally, but **non-essential** to driving change on economic inclusion indicators | *List up to 5 organizations* | *List up to 5 organizations* |

Of the organizations you’ve identified, list the 4-5 whom it will be most important for the indicators project to influence, and a few sentences for each explaining what their current viewpoint is and if/how it needs to change.

***Identify other regional economic success frameworks***

Taking stock of existing regional frameworks for economic success can ensure that your framework builds upon, or makes room to engage champions for, those efforts. Existing frameworks may guide the work of business leadership groups, key public agencies, philanthropies, or regional nonprofit organizations. Identify any other relevant frameworks in your community and respond to the following questions for each identified framework:

1. What organization is responsible for the framework?
2. Does the framework include an explicit definition of economic inclusion?
	1. If yes, what is that definition?
	2. If no, does it include an implicit definition of economic inclusion?
3. What other concepts are inherent within the framework? For example, is there an emphasis on economic growth or economic resiliency? How does the framework define those concepts?
4. Does the framework appear to have buy-in from multiple stakeholders, i.e., beyond its sponsoring entity? Is there discussion of driving change or collective impact? Describe.

**Phase 2 – Create the indicators project**

After setting the conditions for success, the next phase involves creating the indicators themselves. Because there are innumerable ways in which to portray the state of economic inclusion or exclusion in a place, regional leaders should start this phase by agreeing on a vision of success for their communities. That vision can then inform a model or framework of inclusive economic growth that resonates with key stakeholders, animated by a set of indicators. These activities can support teams as they proceed through this phase of work.

***Develop a new/revised framework***

Reflecting on existing regional frameworks and your own views as a team, write a few sentences outlining your initial thinking on each of key questions posed below:

1. Describe your team’s vision of economic success in your region, and why it is important. *If success were achieved in your region, what would that look like and over what time frame(s)? What will economic success help your region achieve?*
2. Identify the themes your project will assess. These themes should clearly relate to your framework’s vision. *What areas must your region improve upon to realize your framework’s vision?*
3. Identify the other organizations or entities that will contribute to realizing this vision. *With specificity, what systems or stakeholders will drive the agenda implied by the framework?*

Create a document that clearly and concisely summarizes your framework, why it is important, and what, at a high level, it aims to achieve.

***Inventory of available data***

Catalog the national and local data sources your team is considering using to develop indicators. The inventory should also identify the framework themes to which the data are related and how the data could be used to develop indicators. Consider consulting the [Indicators Inventory](https://www.brookings.edu/wp-content/uploads/2021/10/Research-Inventory_Indicators-of-Economic-Inclusion.xlsx) as you begin your region-specific data inventories.

Include each data source you may use in your project in the data catalog and address the following questions or topics:

* To what theme(s) or outcome(s) could the data be used to respond?
* What relevant questions could the data be used to answer?
* Identify the group or organization that produces or owns the data
* Are the data publicly available?
* What geographies are available in the data? To what degree do these geographies align with the region you have identified as the focus for this indicators effort?
	+ If your team is benchmarking against other regions, are the same or similar data available in those regions?
* Over what time period are the data available?
* How frequently are the data published?
* Do the data seem more appropriate to measure long-term or short-term trends?
* Prioritize your inventory:
	+ Score from 1 to 3 (1 being poor and 3 being good) the suitability of the data for this project.
	+ Score from 1 to 3 (1 being low and 3 being high) your team’s or organization’s familiarity with the data and confidence in using it to develop an indicator or indicators.
* Any other observations about the data that you think are important to note.

**Phase 3 – Put the indicators to work**

The ultimate test of any inclusive indicators project is not how theoretically sound it is, nor how many organizations in a local community endorse it. The project is successful if it helps change behaviors—in public policy, private-sector practice, and philanthropic investment—in ways that advance inclusive economic growth and prosperity.

***Assessment of key people and their level of engagement***

This task asks teams to reflect on the individual people/decision makers (not organizations) that will be most important to the indicators project and driving change around its findings, how they have or have not been engaged thus far, their level of support for the effort, and strategies to increase buy-in.

In the format best suited to your needs (ex. Word doc, spreadsheet), identify the decision makers most important to the adoption and success of the project and respond to the following questions for each person:

* What has been their level of involvement to date? In what ways has the team engaged them in this effort?
* What is their level of support for the effort on a scale from 1 to 5 (1 – strongly against this effort, 2 – moderately against, 3 – neither supportive nor not supportive, 4 – moderately supportive, 5 – very supportive)?
* What is their level of commitment to the effort on a scale from 1 to 3 (1 – not at all committed, 2 – moderately committed, 3 – very committed)?

If support is below a 4 or commitment is below a 2, outline an influence strategy for the coming six weeks. How will your team engage with this individual to increase their support or commitment?