

Checklist: Is Your Team Ready to “Level-Up” Your Business Engagement Strategy?

The Expanding Business Engagement Technical Assistance (TA) Team will be convening Expanding Business Engagement (EBE) teams online for several days of intense learning, capacity-building, and networking activities in June 2013. In addition, the TA team will provide a package of materials to help states interested in convening their own in-person convenings (perhaps in conjunction with neighboring states). This document is intended to help your team prepare for online activities. We encourage you to spend time – as a team – reviewing each task listed below in advance of our planned online May and June events. It may also be useful in planning for your own convenings, possibly in conjunction with the *Four Key Elements Readiness Assessment* – a more specific assessment tool designed for use in advance of shared learning activities organized by state teams.

- Task 1: Assess Progress on EBE Goals**

Work with your team to determine progress relative to EBE project goals, and map them onto the EBE Framework. For example, if one of your goals was “To Develop an Energy Industry Sector Strategy,” you would determine whether your current work is aimed at understanding, engaging, delivering or measuring. This should help you understand where you have made progress and where you may need additional work so you can focus your efforts during web convenings or other planned activities.

- Task 2: Know Your Team’s Strengths and Challenges**

Peer learning is a major focus of convenings. Developing a clear sense of what your team members need help with and where they can help each other will prepare you to make the most of (virtual or in-person) activities.

 - What has your team learned that you can help others with?
 - What is your team looking for help with?

- Task 3: Determine Your Team’s Goals for Online Activities**

Each team (and team members) will likely have goals they’d like to accomplish through convening activities. For our planned online convenings, thinking about goals relative to each planned activity can help guide the right people to the right activities. Similarly, If you host your own (in-person or online) convening, thinking about goals you’d like to achieve through the whole of the event can help you design specific activities that help achieve them. What are your team’s goals?

- Task 4: Prepare for Online Activities**

Each online convening will be guided by an agenda and a set of themes participants will receive prior to the convening. Preparing to cover the issues listed in the agenda can insure that as many teams as possible receive value from peer learning and sharing. For example, preparing to name specific tools you are using documents you have crafted can make it easier to share them with other teams.

- Task 5: Prepare for SME Sessions** During the months of May and June, EBE teams will interact with Subject Matter Experts (SMEs) 2-3 times. Teams will receive information about SMEs ahead of time so they will know the subjects about which their SMEs hold expertise. They will then schedule online, phone, or even in-person convenings. Teams are encouraged to think ahead of time about the kinds of questions they'd like to cover so that they can make the most of these interactions. States planning in-person Institutes may want to engage SMEs in discussions during those events as well.

- Task 5: Celebrate Your State** How will your peers know where you are from? Team members are encouraged to incorporate state flags, flowers, logos, or other identifiers during online activities. (And for those of you running retreats or convenings at home in person, we hope you encourage a little fun there, too.)

- Task 6: Report Out Clearly and Briefly, But Frequently** Since we will have limited time during the online convenings, the technical assistance team encourages clarity and brevity when reporting lessons, describing practices, or sharing other critical information. The EBE Planning Tools and User Manual contains a Report Out tool that may help in this regard and may also be useful during your own in-person or online sessions.

- Task 7: Adapt This Tool!** Since state teams will likely be running their own events – online or offline, within a state or in conjunction with other states – checklists like this one may be useful to organizers. The technical assistance team is providing this checklist in a form that can be easily adapted to such events and encourages state teams to amend and use it.