**USDA FOREST SERVICE SOUTHWESTERN REGION**

**REGIONAL LEADERSHIP TEAM MEETING: FEBRUARY 2021**

**BREAKOUT GROUP SESSIONS**

**GENERAL INSTRUCTION**

1. There are 10 pre-assigned groups of 4-5 to enable meaningful discussion. Zoom automatically switches you into your breakout and returns you to the main group when it is time.
2. To begin your breakout, please review as a group the section of this handout specific to the session (below). The purpose and work product for each are explained, as well as a recording template.
3. A pre-assigned process person for each group will help ensure that the objectives of each breakout session are met and that the group’s findings are captured. Use the template provided below to record your findings, using as much space as needed. Share screen so all can agree to findings as they are captured.
4. Each group will do a 3–4-minute report out on the session’s findings. The process person can report out, or if someone else, make sure the reporter has clear, succinct points to share.
5. Rebecca Reynolds will move between the breakout groups to address questions and check on progress.
6. Groups will be alerted 15 minutes prior to the session end to finalize findings and report out.
7. ***\*\*Before leaving breakout****,* ***email your filled-out findings template******to:***[*Rebecca@RebeccaReynoldsConsulting.com*](mailto:Rebecca@RebeccaReynoldsConsulting.com) *and* [*Courtney.Upshall@usda.gov*](mailto:Courtney.Upshall@usda.gov)*.* Please provide the name of the process person (or whomever is capturing notes) in the space provided in the template, as we may need to follow up later.

**Breakout Session 1: WORLD FORCES**

**Day 2 - Tues, Feb 2, 2021**

**Breakout Group Composition:** Breakout Mix A (Groups 1A – 10A)

**Purpose**: Through discussion about the group’s assigned World Force, increase your collective understanding of it – the involved factors, the related threats or risks and the associated opportunities.

**Description**: Events in our external environment have a continual impact on it. As these events build into trends, they can significantly affect the organization. A primary role of leadership is to keep watch for events building into trends, come to a shared understanding of what they mean and communicate this to aid the rest of the organization in addressing them.

**Work Product**: Identify the factors associated with this World Force, indicating each’s impact level on the region. Briefly explain the risks/threats involved and the associated opportunities for the region (this is *not* about listing what the region could *do* about them). Finally, write a description of the World Force. (See RRC World Forces example handout as reference)

**3-4 Minute Report Out:** Read your World Force definition and share the-high impact trends your group identified with it. Mention major risks/threats and the associated opportunities. Indicate whether your group felt this World Force should be included in the Strategic Plan. (Prepare the report out highlights.)

Use as much room as you need inside the template table.

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| **FINDINGS TEMPLATE: World Forces** | **Process Person:** | | | | |
| **World Force description:** | | | | | |
| **Events/Trends (list with brief explanation)** | | **Impact on the Region** | | | |
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| **Associated Risks/Threats:** | | | | | |
| **Associated Opportunities:** | | | | | |

***EMAIL YOUR FINDINGS BEFORE YOU LEAVE!***

**Breakout Session 2: REGIONAL IDENTITY**

**Day 3 - Wed, Feb 3, 2021  
Breakout Group Composition:** Breakout Mix B (Groups 1B – 10B)

**Purpose**: Through discussion about the region – its unique character, values and beliefs – explore your collective understanding of it and note what is essential to know and communicate about it.

**Description**: The larger an organization becomes, the more challenging it can be for those inside and outside to connect with it. Those who take care to develop and share core aspects of what is distinguishing about the organization have a higher likelihood of connecting with the right people. The different parts and levels of the same organization also benefit from this activity. Defining the identity of a part of a greater whole is about aligning with that, while clarifying what makes this part unique.

**Work Product**: Discuss the qualities of the region (the physical place) that distinguish it. List those values and beliefs from the Who We Are doc that are especially important to the region and why, then indicate if there are others intrinsic to the region. Finally, bring these together in a set of statements about the Southwestern Region identity, or at minimum, identify the core elements of such an identity statement.

**For Example:**

*Qualities*: ecological diversity and a unique cultural character

*Values*: (we value) taking care of people; ties to the land

*Beliefs*: (we believe that) water is crucial for life; science is a foundation for good management

Statement of Identity: The region is marked by its extreme ecological diversity from desert to alpine, with the most threatened and endangered species in the country. The region’s aridity means both water and fire play unique and powerful roles. The diversity of the landscape is matched by the region’s unique cultural mix, with its own long land history and heritage. Indigenous tribes and pueblos, land grant communities, and the newer Anglo settlements create a rich and varied connection to each other and to Forest lands, resulting in one of the more intensely collaborative regions in the Forest Service. Not among the primary timber producers, the Southwest region leads in restoration of its diverse landscapes. This means considering new approaches, working with diverse partners, and piloting innovative projects.

**3-4 Minute Report out:** Share your SW Region identity statement, or, if you don’t get that far, share core concepts (qualities, beliefs, etc.) that your group feels are important to include in this statement. (Prepare the report out highlights.)

Use as much room as you need inside the template table.

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| **FINDINGS TEMPLATE: Identity** | **Process Person:** |
| **Qualities unique to the Region** | |
| **Values essential to the Region and why** | |
| **Beliefs that define the nature of the Region’s mission/work** (*hint: these will be used in the next breakout, so make special note of them*) | |
| **Statement that captures the above** | |

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**Breakout Session 3: VISION, BELIEFS, MISSION**

**Day 4 - Thurs, Feb 4, 2021  
Breakout Group Composition:** Breakout Mix B (Groups 1B – 10B)

**Purpose:** The purpose of this session is to explore the highest-level questions that define the region: What desired state inspires us to work toward it? What do we know and believe about our world that is the basis for our choice of mission? And finally, what is it that we do for whom? This discussion focuses on expanded thinking, deeper awareness of operating assumptions, and renewed clarity.

**Description:** These three elements of the strategic plan work in tandem, forming a trinity of understanding. They’re informed by the region’s identity discussed in the last breakout. The vision statement describes the future desired state that the entity is working toward. An aspirational statement that inspires us and others. The beliefs state clearly the basis for our chosen mission, which succinctly and memorably describes what we do and for whom. (See RRC example handout)

**Work Product:** Develop draft Vision, Beliefs and Mission statements for the Southwestern Region, or a minimum, the core elements that should be in each.Begin with the Vision. Think of it as the way things are when the organization’s work is no longer needed and describe that. Next, consider the beliefs that you discussed in the Regional Identity breakout: which of these provide specific understanding for the region’s mission? Finally, succinctly state what the region does and for whom.

**3-4 Minute Report Out:** Share the final draft Vision, Beliefs and Mission statements your group has written. If you don’t get that far, share the core concepts you feel each statement should include. (Prepare the report out highlights.)

**TIPS:***Vision*: Write in the present tense. Don’t refer to the region, unless to say “R3 envisions…”

*Beliefs*: These are the beliefs that inform what this region does, at its highest level. Think about creating a logic chain between the beliefs that leads from the Vision to the Mission (see RRC example handout)

*Mission*: Carefully consider the verb chosen to express the “doing” part of the mission. Words like “provide” or “manage” are drab, words like “protect” are metaphorical, unless used in a military context, and don’t work well in the Mission.

Use as much room as you need inside the template table.

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| **FINDINGS TEMPLATE: Vision, Beliefs, Mission** | | **Process Person:** |
| 1. Brainstorm concepts or elements for each – explore fresh language (no jargon): | | |
| Vision – aspects of the desired future | E.g., Landscapes flourishing in their variety, strong communities, vast open landscapes, outstanding unique places, home to long-standing traditions, etc. | |
| Beliefs – consider ones from Identity | E.g., world needs healthy landscapes, historic and innovative uses can coexist, fire used well is a benefit, etc. | |
| Mission - WHAT | E.g., steward the lands, engage the community, reconcile multiple uses | |
| Mission - FOR WHOM | E.g., peoples of the southwestern region, communities of the southwest, etc. | |
| 2. Develop draft statements | | |
| Vision |  | |
| Beliefs (3) |  | |
| Mission |  | |

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**Breakout Session 4: ORGANIZING PRINCIPLE**

**Day 5 - Fri, Feb 5, 2021  
Breakout Group Composition:** Return to Breakout Mix A (Groups 1A – 10A)

**Purpose:** The purpose of this session is to explore the relative benefits of different organizing principles for the Region’s three core areas of focus for its Mission work.

**Description:** An organizing principle is the core concept by which a set of things, ideas, or activities is arranged. In thinking about our work, we each naturally create sub-sets that we use to organize the way we think about and deal with what we do. This is so automatic that we’re often not aware of having done this or what our organizing principle is. Leadership’s consideration of different possible ways to collectively do this brings new ways of thinking and, once a common organizing principle is chosen, provides a powerful shared lens for the Mission work.

**Work Product:** Findings associated with the benefits of different organizing principles. First, review the example organizing principles in the template and brainstorm others. Think about what you use in your own work – and look to see if there are different ones used in other contexts. Next, to ensure these are clear, develop possible Focus Areas for the region’s mission work associated with each organizing principle (see examples in the template below). Finally, identify the potential benefit to the region from using each organizing principle and discuss the merits of using one set versus another. Agree upon one set (or at most two) that the group feels would work well for the Region and why.

**3-4 Minute Report Out:** Share the organizing principle your group felt would most benefit the region and explain why. Give examples of the Focus Areas associated, and indicate if the group likes them as is, or if they need more consideration. (Prepare the report out highlights.)

Use as much room as you need inside the template table.

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| **FINDINGS TEMPLATE: Organizing Principle** | | **Process Person:** | |
| **Organizing Principle Theme** | **Associated Focus Areas** | | **Benefits of this theme to the Region** |
| ASPECTS of what we do | Restore, Respond, Protect | | Easily understood by workforce |
| WHO we serve | Licensees, Public, Decision-Makers | | Easily understood by “customers” |
| Landscapes we steward | Desert, Riparian, Mountains | | Aligns with unique nature of SW reg |
| Communities we serve | Wilderness, Rural, Urban Interface | | Helps internal/external understanding of varied needs |
| OUTCOMES of what we do | Resilient Lands, Responsive Access, Robust Resources | | Speaks to customer needs, makes outcomes clear to workforce |
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