



## COMPETITIVE WISCONSIN

### **Competitive Wisconsin, Inc. The BE BOLD Process**

Competitive Wisconsin, Inc.'s (CWI) BE BOLD initiative is a strategic research and public information and outreach process dedicated to improving Wisconsin's ability to grow jobs, create wealth and strengthen its economy.

The BE BOLD process now involves eight specific steps, all of which are overseen and guided by the CWI Board (Board) and the BE BOLD Council (Council), a volunteer, contribution-based subset of the CWI membership.

- **Step 1 – Selection of the BE BOLD issue or topic.**

This step involves: a) the identification of possible options, normally developed on the basis of contemporary need, urgency and/or opportunity; b) Board and Council discussion and research; c) determination of priorities and narrowing of options; d) selection of a specific option; e) discussion and delineation of objectives; f) discussion and delineation of preferred research methodology; g) approval of topic, objectives and methodological approach by the Council and the Board.

- **Step 2 – Execution of the designated research by recognized professionals.**

The professional research phase of BE BOLD involves: a) drafting request(s) for proposal(s) for the designated research element(s); b) raising funds to support the research; c) identifying qualified research professionals; d) requesting and reviewing proposals from those selected to submit them; e) retaining the research professionals selected; f) identifying and recruiting an Executive Committee to oversee the research and the writing of the initial report; and g) identifying and recruiting an Advisory Board to advise the Executive Committee on the research and the interpretation of the data.

- **Step 3 – Initial briefings for business leaders, economic development professionals, policy makers, news media and other regional opinion leaders.**

Approximately mid-way through the research process, BE BOLD offers regional briefings on the process and the findings to date for key opinion leaders. These mid-process briefings began with BE BOLD II and most of the dozen or so regional briefings during that initiative were co-hosted by CWI, a University of Wisconsin System campus and a Wisconsin Technical College campus. In a number of cases, local Chambers of Commerce/Cities and Workforce Investment Boards also co-hosted. In addition to recruiting and working with co-hosts in local areas statewide, this phase of the process also involves: a) identifying and inviting local and regional stakeholders and experts to participate in the briefings; b) contacting and informing the news media in each of the regions; c) gathering input from the regional and local stakeholders and experts; and d) making sure the local and regional input is shared with the research team, the Executive Committee and the Advisory Board.

- **Step 4 – Draft, edit and produce the initial BE BOLD report.**

Producing the initial report involves: a) final oral presentations to both the Executive Committee and the Advisory Board; b) a draft report from the research team; c) circulation of the draft report to members of the Executive Committee; d) editing by BE BOLD staff; e) the generation of a semi-final report by both the research team and the BE BOLD Council; f) circulation of the semi-final report; and g) production of the initial approved report.

- **Step 5 - Convene and engage the BE BOLD Strategic Planning Group.**

The BE BOLD Strategic Planning Group (SPG) is comprised of those Wisconsin businesses, institutions, policy makers and stakeholder professional associations and organizations affected by and/or interested in the issues under consideration. The BE BOLD II SPG, for example, included representatives from more than 80 such sources. The SPG's "job" is to help inform and refine the policy recommendations that will be included in the final report. Potential members are identified and invited to a meeting approximately one month prior to the completion of the initial report. The group will normally convene four more times, including once after each of three Wisconsin Economic Summit sessions (see below) and then one final time to review and discuss a draft of the final recommendations.

- **Step 6 – Convene and manage the Wisconsin Economic Summit Series.**

Once the research report is completed and the process of identifying BE BOLD policy recommendations is underway, CWI convenes and manages the Wisconsin Economic Summit Series, a series of three conferences dedicated to informing opinion leaders, the news media and the general public about the research and recommendations and providing them with an opportunity to share their thoughts, opinions and concerns about the information. This phase involves: a) raising funds to support the Summit Series; b) identifying and recruiting co-hosts for the summits [NOTE: The BE BOLD I and II Summit Series were co-hosted by the University of Wisconsin System and the Wisconsin Higher Education Business Roundtable.]; c) designing the three programs and recruiting the necessary presenters and panelists; d) identifying and managing all the other logistical requirements associated with three major conferences held in different locations; e) contacting, informing and engaging the news media; f) holding the three summits and ensuring that the input gathered is assimilated into the final BE BOLD report.

- **Step 7 – Prepare the final report.**

The final report evolves from the initial report based on input from the SPG, the Summit Series audiences, and final discussion and input from the Executive Committee, the Advisory Board, the BE BOLD Council, and the CWI Board. It will include the research findings and a series of specific BOLD policy and other action recommendations.

- **Step 8 – Brief elected officials, policy makers and regulators.**

BE BOLD attempts to ensure that elected officials, policy makers and regulators are kept informed and engaged throughout the process. This engagement with the research and recommendation formation culminates with formal briefing sessions normally held within a month of the final Summit Series meeting.