

Charting the Future of Our Community

Making the Trip

PENNSTATE



College of Agricultural Sciences
Agricultural Research and Cooperative Extension

ABOUT THIS BOOK

Charting the Future of Our Community is a strategic visioning process designed to help communities plan for and control their future. It uses the broad diversity of viewpoints in a community to discover a common vision for the future, and to develop a plan of action to achieve that community vision. The *Charting* program is facilitated at the local level by trained facilitators (typically Penn State Cooperative Extension staff) and involves 25 to 40 participants (reflecting the wide range of and often conflicting perspectives in the community) in a series of four three-hour meetings.

This workbook is one of a series used to facilitate the *Charting* process. The workbooks include:

Charting Workbook 1: Setting Our Course

Charting Workbook 2: Where We Are

Charting Workbook 3: Where We Want to Be

Charting Workbook 4: Making the Trip

For more information, contact the Penn State Cooperative Extension office in your county, or visit the Penn State Cooperative Extension Charting Web site at <http://visioning.aers.psu.edu>

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INTRODUCTION

This part of the *Charting* program is where the rubber hits the road! Your efforts to develop workable action plans will largely determine the success or failure of the *Charting* program in your community. You have identified your community's strengths and weaknesses and examined your community's social and economic trends. You have identified and prioritized a number of worthy long-term goals that will improve the quality of life in the community—if they are achieved. Achieving those goals will take a tremendous amount of effort, but then nobody said good things come easily.

Many of the goals you have identified are very large and will take many years to achieve. Breaking them down into smaller pieces and identifying projects to achieve them will make it easier to reach these goals. Keys to developing successful action plans include:

- Restrain from rehashing or lamenting the past. Instead, learn from the past but focus on the future.
- Break the goals down into projects or initiatives (short-term goals) that can be achieved in 6 to 18 months.
- Identify how you will know whether a short-term goal is achieved (Measures of Success).
- Identify which individuals and organizations in the community need to be involved to achieve the action plan, and devise a strategy for getting them involved.

This step in the *Charting* process continues to build on your efforts in the previous sessions. You will work in small groups to develop your action plans. The following two worksheets will help your small group develop the action plans in a logical fashion.

Identifying Projects

The “Project Identification Worksheet” breaks down a long-term goal into achievable projects or initiatives. The small group should select one long-term goal identified in session 3 and write the goal on the worksheet. Action team members then discuss and list projects or initiatives that would lead toward achieving the goal. If your group identifies more than three projects (which is very likely), simply use additional worksheets to make sure you capture all of the project ideas. It is extremely important to identify “Measures of Success” for each of the projects. The “Measures of Success” will be used to track the community’s progress toward achieving the goal.

After you have listed the projects and “measures of success,” spend a few minutes reviewing the projects to determine if there is a logical order in which they should be accomplished.

Developing Action Steps to Achieve the Projects

The “Action Step Development Worksheet” will help your action team break down the projects further into smaller “Action Steps.” The action team members should select one or two projects identified on the “Project Identification Worksheets.” Write the goal and project in the spaces provided.

Write a short statement that tells what the project would accomplish. This statement will help action team members market the project to other stakeholders.

List the names of individuals and organizations inside and outside the community that can help achieve the project. The action team members will use this information to recruit additional people to help with the project and identify potential resources.

Who would the project help?

Clearly identify stakeholder groups the project would help and briefly list how you think it would help them.

Would the project hurt any individuals or groups in the community?

It is important to carefully consider this question to help head off opposition to the projects. If groups or individuals will be hurt, identify how you think they will be hurt and determine if the damage can be avoided or minimized.

The project would require:

Completing this part of the worksheet will help the group identify resources needed to accomplish the project.

What action steps can be initiated to accomplish this project, who will do it, and when will it be done?

List action steps that can be achieved in six months or less. If an action step will take more than six months to accomplish, the action team should consider making the action step a new project and develop action steps for the new project.

Complete each action step by identifying “Who Will Do It?” and “By When?”

Goals in Action

It is very likely that a project identified by an action team to address one specific goal will affect other goals identified through the *Charting* process. Action teams should share the projects they have identified with the entire *Charting* group. Use the “Goals In Action” worksheet to identify projects that affect other goals. Action teams can use this information to ensure they are not duplicating efforts and to join their efforts to achieve a project more efficiently.

Project Identification Worksheet—Sample

Completing this worksheet will help *Charting* action teams identify, define, and evaluate projects or initiatives that may be implemented to achieve goals. The projects you identify should be achievable in 6 to 18 months. Write out at least one

measure of success for each project. These measures of success will help communicate the value of your efforts to community leaders as the project is being completed.

Goal: *Develop a community center for local events including plays or community theater, concerts, and social events.*

Action Team Members:

<i>Bob</i>		
<i>Maria</i>		
<i>John</i>		
<i>Jane</i>		

Project/Initiative:

Identify and investigate potential locations.

Measures of Success (How do you know it is done?)

A list of potential sites will be printed. The sites will be evaluated based on location, cost, and accessibility.

Project/Initiative:

Identify similar communities that have developed community centers and interview community leaders to determine how the center was developed and maintained.

Measures of Success (How do you know it is done?)

Report will be generated identifying communities that have developed community centers and detailing how the center was developed, maintained, and operated.

Project/Initiative:

Conduct a survey to determine level of community support for a center.

Measures of Success (How do you know it is done?)

Publish the survey results and distribute in the community.

Review the list of projects identified by the action team to determine if they need to be completed in any specific order. Record additional action steps on blank worksheets if necessary. Action steps will be developed for several of the projects. The projects identified by the action teams will be compiled into a report and sent to *Charting* participants for their review and comment. A final report detailing the projects and action steps developed by the action teams should be compiled at the conclusion of the formal *Charting* program.

Project Identification Worksheet

This worksheet will help *Charting* action teams identify, define, and evaluate projects that could be implemented to achieve goals. The projects you identify should be achievable in 6 to 18 months.

Write out at least one measure of success for each project. These measures of success will help communicate the value of your efforts to community leaders as the project is being completed.

Goal:

Action Team Members:

Project:

Measures of Success (How do you know it is done?)

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Action Step Development Worksheet—Sample

Action teams can use this worksheet to identify, develop, implement, and evaluate action steps that need to be accomplished to complete projects or

community initiatives. Action teams are encouraged to complete a separate sheet for each action step.

Goal: *Develop a community center for local events including plays or community theater, concerts, and social events.*

Project: *Identify and investigate potential locations*

Before completing the next section, consider the following questions:

- Does it have several smaller steps or phases?
- Is it a series or group of projects?
- If so, does it require that they all proceed?
- Should you pick one of the small projects or phases to evaluate now and wait to consider others later?

What would the project achieve? (Why do it?)

This project will identify existing facilities that may be used as a community center and identify sites in the community where a community center could be constructed.

Who can help? (Identify individuals and organizations in and outside the community that can help.)

<i>Superintendent of schools</i>	<i>Volunteer fire departments</i>
<i>Local elected officials</i>	<i>Service clubs</i>
<i>Churches</i>	<i>Coal company</i>
<i>Local developer</i>	<i>Banker</i>

Who would the action step help?

Community theater, service clubs, school, senior citizens

Would the project hurt any individuals or groups in the community? Yes No If so, who?

The project would require: (Circle all that apply)

Paid staff Volunteers Technical assistance Equipment Construction Financing

What action steps can be initiated to accomplish this project, who will do it, and when will it be done?

Action step	Who will do it?	By when?
<i>Identify existing facilities that could serve as a community center.</i>	<i>John, Mary, Joe</i>	<i>3 weeks</i>
<i>Identify vacant land that could be developed for a center and contact owners to determine availability.</i>	<i>Sam, Judy, Sandy</i>	<i>2 months</i>

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 Volunteers
 Technical assistance
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 Construction
 Financing

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Action step	Who will do it?	By when?

Achieving the Vision and Sustaining Community Involvement

Ensuring the fourth meeting isn't the end of the process

The *Charting* process never really ends. Your action plans will change as your community's needs, resources, and priorities change. Your first version will change over time as you learn from your experiences and improve it. Think of your plan as a work in progress kept in a loose-leaf notebook, not as a hardcover book that never changes. Constant evaluation will help you see how well the community is doing, understand the benefits and impacts of certain activities, and make decisions based on better information.

Successful implementation of your action plans will depend on monitoring and continuous learning about the following:

- How will members of the community be kept involved and informed?
- How will the community report on annual progress?
- How and when will you review and update the strategic plan?
- How will the community evaluate its processes for making the action plans happen?
- How will you determine the success of the actions?
- How will you determine if the completed actions move you closer to your vision?

The implementation timeline on page 15 is intended to help you work through the following steps for success.

1. Continuing Public Involvement

After the initial enthusiasm of developing a community vision and action plans, many communities find it difficult to maintain public interest and involvement. This drop-off is normal, but over the long term, the potential benefits of the *Charting* program will be greatly diminished if the action plans are implemented by a small number of people. The *Charting* group should develop a strategy to market the vision and action plans to the entire community in order to encourage more

people to become involved. Vibrant communities always have a large pool of motivated people. Successful strategies used in other communities to solicit public commitment include organizing a town meeting to explain the *Charting* process, community vision, and action plans; establishing working committees; or holding regular town hall meetings. It is especially important to reach out to those segments of the community that have not been very active in past community functions.

2. Progress Reports

How will successes be publicized? As the strategic plan is being implemented, it is important to have constant communication with the public and agencies that have provided resources to the community. It is easy to forget to tell everyone what you are doing when you are so busy doing the work. However, the individuals and agencies that support the community need to know that their time and money are being well spent. The strategic plan should describe how and when you will provide progress reports to the public and other partners. This will help maintain good partnerships and ensure continued support from inside and outside the community.

3. Strategic Vision and Action Review and Amendment

How and when will the community review its strategic vision and action plans? This review can ask both "How is the community doing?" and "How well are the plan's goals being carried out?" A review team should include some of the people that developed the plans as well as members of the public. The review team can consider unexpected circumstances and scan the environment for new problems or opportunities. Some communities have sponsored abbreviated *Charting* programs on a regular basis to review and update their strategic vision and action plans. The review may identify things that need to be changed in the strategic plan. Perhaps you thought you could build a new airport,

but you later learned that your proposed site was a toxic waste area. As your situation changes, so will your plan.

4. Continuing Evaluation

Every once in a while, you should stop and look at what went right or wrong, learn why it happened, and try to prevent similar problems in the future. The strategic plan should describe how and when the community will evaluate the process, outputs, and outcomes of the strategic plan. If you already know who will do your evaluations, include them in the planning process. They can tell you what kind of data is needed to do a good evaluation.

Process

Did people complete their tasks on time and within budget? Are partnerships succeeding? A process evaluation helps answer questions such as “What changes are needed in how we are carrying out our plan?” and “How can we do it better?” It may be possible to do a process evaluation at the end of the first year, or it may be more effective to do it during the strategic plan’s annual review and update.

Outputs

An output evaluation asks, “How much of what we planned to do did we actually accomplish?” Outputs are usually things that can be counted and that you can see completed in a short timeframe. They result from activities in the strategic plan and work programs. Examples might include jobs created, houses built, or programs started.

Outcomes

In evaluating the end results of implementing a strategic vision, ask “How successful were we in tackling the long-term problems in our community?” or “How successful were we in achieving our long-term goals?” Outcomes are usually long-term (for instance, fewer people living in poverty) and linked to problems and goals. They are hard to evaluate because many factors that influence a community’s well-being are out of its control (such as weather and world trade). The outcome evaluation should be made after your strategic plan has been in effect for a long period of time, such as 10 years.

Monitoring

Many communities overlook the importance of monitoring and evaluating the community development process. When you face pressing deadlines and limited resources, evaluation may seem like a luxury you cannot afford. Nothing could be further from the truth. In fact, it is critical that you check in with people in the community to make sure your efforts are heading in the right direction. Building in an evaluation process from the very start will help you get feedback later. The most successful communities maintain momentum, learn from their experiences, and improve as time goes on. Good luck in achieving your community’s vision!

As the strategic plan and action steps are being implemented, your lead organization should track what is going on with all your measures (benchmarks) of success. The lead organization is responsible for maintaining good communication with all the partners in the community development process, tracking the use of money, and keeping the entire community and other partners updated about current activities.

Some of the leaders’ responsibilities are described in the strategic plan:

1. Continuing public involvement
2. Annual progress reports
3. Strategic plan review and amendment

In addition, action steps should describe how the community will handle benchmark review and amendment and financial accountability. How and when will the community review its benchmarks? This review can be done at the same time that the strategic plan is reviewed (usually once a year). The review team should include the lead entity, advisory board members, and benchmark leaders, as well as community members. The review may identify things that need to be changed in the work program. For example, if the community was unable to obtain a grant, the benchmark must be redesigned to reflect a smaller budget. Your action steps should describe an official public process to change benchmarks. Avoid revising your benchmarks every time something needs to be changed. An annual review cycle works well, except in special cases

where there may be a new opportunity that requires a quick response. Constantly changing your benchmarks may cause community members to lose interest in the planning process.

Financial Accountability

When you receive funding from an outside source, account for where it goes and keep appropriate documentation. The leaders should know where all funding is coming from and how it is being spent.

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