

Building a Vision for the Future: Strategic Planning

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Objectives

Participants will...

1. understand and explain the reasons for a community to engage in strategic planning and describe some outcomes of effective planning,
2. identify the components of a strategic planning process,
3. design a strategic planning process for use in their community or with a community organization,
4. develop questions to guide components of a strategic planning process, and
5. understand and fulfill the role of a facilitator for a strategic planning process.

Total Time Required

2 - 3 hours

Materials Needed

- PowerPoint presentation or overhead slides
 - ❖ *Shaping Our Future: The Community Planning Process*
- Handouts
 - ❖ *Planning for Success: Homegrown Community Development*
 - ❖ *Calendar of Activities for a Community Visioning Process*
 - ❖ *Report Form for a Community Visioning Process*
 - ❖ *Moderator's Guide for a Community Visioning Process*
 - ❖ *Flow Chart of Required Tasks to Host a Community Public Services Summit*
 - ❖ *Our County Summit of Public Service Agencies - Agenda*
 - ❖ *Long-Range Planning for Community Infrastructure Development*
 - ❖ *Evaluating Development Proposals: A Checklist for Community Decision-Making*
 - ❖ *Organizational Strategic Planning*
 - ❖ *A Survey to Jump-Start Organizational Strategic Planning*

Audio/Video Equipment

- Flip charts and markers
- LCD projector/Overhead projector

Directions and Training Tips

1. It is most effective if participants think through the reasons for strategic planning on their own and engage in the same kinds of questions that would be used in a planning process. Thus, it is good to use questions and facilitated discussions throughout the training.

a. Why should you plan? and, What are the outcomes of effective planning?

Use the following visuals:

- ❖ Why Plan? - Let's Just Do It!
- ❖ What Does a Plan Do for Us?
- ❖ Key Challenges of Planning
- ❖ Outcomes of Effective Planning
- ❖ Key Steps in the Planning Process

Introduce the following discussion questions:

- ❖ How many of you have a strategic plan?
IF YES, How do you feel about the plan? How effective has it been?
IF NO, Why don't you have one?
- ❖ What would you say to a sceptic would be the benefits of engaging in strategic planning? What happens if you don't plan?
- ❖ What would that sceptic argue back? What would they say happens if you do plan?

Key Points

Although most of us would plan for a family vacation or develop plans for remodeling our homes, we often resist planning in our communities/organizations. Why? We might have had a bad experience – lots of time invested in a planning process with no final product or the plan was completed and then ignored – or, we are anxious to just “do it” and don't want to “waste time” on the process of planning. For planning to succeed, participants must be convinced of the value of the process and thus committed to investing the time to produce an effective action plan.

b. Community planning begins with a vision for tomorrow

Use the following visuals:

- ❖ A Strategic Community Vision
- ❖ A Strategic Vision Must

Introduce the following discussion questions:

- ❖ What is a community/organization vision? What does a vision provide us?
- ❖ A community visioning process - engaging citizens where they are at
- ❖ How many of you have hosted or attended a community meeting? How many people showed up? Why is it so difficult to get people to attend a meeting?



- ❖ What would be your measure of a successful community meeting? In other words, how many participants would make you feel like you had been wildly successful?
- ❖ How many of you have ever done a community survey? Was it easy or difficult to get people to complete the survey?
- ❖ Why do we want to maximize community participation in thinking about the future of the community?

Key Points

A community visioning process is not a scientific study or survey of the community's population. It is a way to maximize the participation of citizens in conversations about the future of the community and consciously seeks ways to engage local organizations in vesting an interest in the visioning process and then making the vision a reality. This community visioning process requires the community to act for itself because the process is led and done by local residents. The role of Extension is to support the implementation of the process through organizing the planning group, training local facilitators, analyzing the data and disseminating the results.

- c. A public services summit - an infrastructure and services leadership round-table
- ❖ How often do representatives of community infrastructure meet? In other words, how often do city and county officials meet for informal discussion on the future of the community?
 - ❖ If you are in a county with multiple providers of water services or police or fire protection, how often do representatives of these services meet?
 - ❖ Do you have an interagency social services work group that meets periodically?
 - ❖ What do you see as the advantages of getting representatives of all the public and social services organizations/agencies in the county together around the same table? What do you see preventing this from happening?

Key Points

In many communities, there are few opportunities for the leadership of key public and social services agencies to get together to talk about the challenges facing the community and what they want for the future. A public services summit provides a context for this to occur and offers another way to begin building a vision for the future but one that starts from the perspective of key leaders in the community rather than citizens. This is a quick and highly effective way to identify consensus on key components of a community vision and areas for joint action.

- d. Community assessments - figuring out where we are, how we got here and the implications

Use the following visuals:

- ❖ In a Community Assessment You...
- ❖ What Can a Community Assessment Tell Us?
- ❖ Approaches to Community Assessment



Introduce the following discussion questions:

- ❖ What would you say are some unique qualities of your community? (Think about environmental/natural resource, historic, cultural and people qualities)
- ❖ What have been some significant events in the history of your community and how did these events influence your community?
- ❖ What stories do people tell about this community and the people who live here?

Key Points

You must know where you have come from to understand where you are and to determine where it is possible to go. Community assessments provide us with this grounding. There are many different approaches to community assessments and each has its strengths and limitations and each provides us with a different kind of lens onto our community. Conducting community assessments are a good way to engage in the planning process many different types of people of different ages. It is critical that the community assessment does not fall into the “negativity trap” – what we don’t have, what we can’t do, what we do terribly, what we don’t like – and instead climb the springboard of positive energy – what we have, what we can do, what we do well, what we like.

e. Drafting the action plan – putting our dreams onto the road of reality

Use the following visuals:

- ❖ Questions to Guide the Drafting of a Plan
- ❖ Elements of a Good Plan
- ❖ Types of Community Plans

Introduce the following discussion questions:

- ❖ I am a business owner looking for a place to open a new factory. What would you say to me to convince me to come to your community? What am I looking for? If you don’t have it, what can you tell me about when it will be here?
- ❖ I am a residential developer looking at some property in your community, and you would like for me to decide to build my new development in your community. What would you say to me to convince me to come to your community? What am I looking for? If you don’t have it, what can you tell me about when it will be here?
- ❖ I am a high school senior in your community. I am going to go away from college. What will you tell me about what this community is going to be like in 10 years that might persuade me to come back?
- ❖ Who (people, organizations, etc.) gets things done in your community? What needs to happen to get them involved in making the action plan work where the rubber meets the road?



Key Points

An action plan redefines the vision into concrete goals – things that have to happen to make the vision a reality – and each goal has component actions or things that have to happen to make that goal a reality. Then the action plan must incorporate some reflection on the kinds of resources (financial, organizational, ordinances, facilities, etc.) that will be needed to complete each action. Finally, and most importantly, the action plan must identify the “initiating party” for each action. The initiating party is the entity that will jump start that action – perhaps by incorporating the action into their own work plan if an organization or agency, perhaps by convening a work group of other interested citizens, perhaps by writing a grant proposal or identifying sources for funding. Without an initiating party, the plan will never become a reality, but with an initiating party, the plan and the vision it embodies has a chance.

f. Leadership and attitude: the other keys to success

Use the following visuals:

- ❖ The Other Keys To Success

Introduce the following discussion questions:

- ❖ Is having a vision and plan enough for success? What do you see as other critical keys to success?
- ❖ Can you give me an example where as a community you did something for yourselves? What was it? How did it happen? Who worked on it? Why did they do this?
- ❖ Can you give me an example of something you tried to do for yourselves as a community but it didn't work out? What was it? How would you explain what went wrong? If you were to try and do this again, what would you change?
- ❖ Has someone (an individual developer, the state) come to your community with a proposal for a development project? What happened? What kinds of questions should a community ask when presented with a “development opportunity?”
- ❖ As a community/organization, how well do you play with others? What do you do with others (e.g., public/private partnerships, multicomunity collaborations)?

Key Points

Great visions and focused plans can falter on the shoals of poor attitudes and limited leadership. Thinking critically about your own history, projects that succeeded and projects that failed, can offer insights into the importance of attitudes and leadership in community development efforts. This kind of introspection also helps us to think through the critical questions we need to ask when ideas or proposals for development projects emerge.



In-Class Activity

Participants will take turns organizing and leading group activities around the following questions.

Participants will need to decide how to organize those present for the discussion(s) and then develop consensus points from the discussion(s).

Each facilitator will have seven minutes for their question. During this time they must engage the other participants in a discussion of the question and summarize key points.

The questions:

- ❖ Identifying issues related to growth and change - What are the key issues/challenges facing your community/organization?
- ❖ Imagine your community/organization in 20 years. How would it be different so that it would be a better place to live and/or work? In other words, what do you want your community/organization to have, do and be in 20 years?
- ❖ Are there factors that will make it easy/difficult to move toward your vision?
- ❖ What are you doing well as a community/organization?
- ❖ What are you doing as a community/organization that you could be doing better?
- ❖ What needs to be done that no one appears to be doing?
- ❖ What resources would you need in order to do things better and to start doing what needs to be done?

Going Further - Activities for Participants to Do

Use this process or a component of this process in your own office group. How would you describe the mission and vision of your group to someone else? What would you say is your long-range plan for achieving this vision?

Use a component of this process with a group or an advisory council or Board with which you are affiliated. For example, encourage a 4-H club or a Homemaker's club to do some strategic planning. Guide the process.

Identify a challenge or an opportunity in your community. Develop a set of questions that would lead a group of citizens through the process of planning to respond to this challenge or opportunity.



Additional Background Readings

Fujishin, Randy. (1997). *Discovering the Leader Within: Running Small Groups Successfully*. San Francisco, CA: Acada Books.

Henton, Douglas, John Melville, and Kimberly Walesh. (1997). *Grassroots Leaders for a New Economy: How Civic Entrepreneurs are Building Prosperous Communities*. San Francisco, CA: Jossey-Bass.

Maxwell, John C. *The 21 Irrefutable Laws of Leadership*. Nashville, TN: Thomas Nelson, Inc.

