



Stronger Economies Together

Strategies for Building New Economic Opportunities

Module Eight: Planning for Success

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Module Eight: Planning for Success

Module Eight is designed to move participants toward a concrete plan of action based on the vision and goals established in previous sessions. While the term is not used within this section, the process is based on a basic logic model concept.

Using the *Participants' Guide*

The *Participants' Guide* contains handouts designed to assist participants in planning their economic development effort.

Group Exercises

The group exercises and discussions in this module will help the participants understand the materials and get to know each other, while getting a break from listening to the presenter.


Slide 2:	Reflecting on the Previous Session
Slide 5:	Considering Potential Goals
Slide 7:	Evaluating a Potential Goal (Handout One)
Slide 8:	Writing SMART Goals
Slide 14:	Your Plan: Start with the End in Mind (Handout Two)
Slide 17:	Your Plan: Behaviors
Slide 20:	Your Plan: Attitudes, Skills, Knowledge
Slide 23:	Your Plan: Select Best Strategies
Slide 26:	Your Plan: Checking the Story
Slide 28:	Your Plan: Assets
Slide 31:	Your Plan: Gearing Up for Action (Handout Three)
Slide 32:	Final Reflections

References

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Instructions:

Please have this slide showing as participants enter the room.

Script:

“We have invested a good bit of time and energy up to this point to thoroughly explore relevant information to guide our regional efforts. Our session today is designed to bring together all that work to form a regional plan. Let’s get started.”



Slide: 1

Time: 15+ Minutes. Please have this slide showing as participants enter the room.

Instructions:

Take time to ensure the participants recall the key points from the last session. This important activity offers each participant an opportunity to clarify anything that didn't make sense and to comment on additional insights or reactions they have had since the previous meeting. Feel free to facilitate this discussion in whatever way seems most appropriate for the group. Participants should discuss the three questions on the slide, either in small groups of 4-5 or as an entire group.

Reflecting on the Previous Session

- What was most useful from the previous session?
- What progress have you made since then?
- Any other comments or questions about that session?



Slide: 2

Time: 5 Minutes

Script:

“Before we get started talking about Module Eight, let’s take a minute or so to reflect on what we learned in our last session. First, is there anything that remains unclear? Any thoughts you may have had about the materials we covered, or specific activities you may have completed as part of the homework you were assigned at the end of the last meeting? Let’s take a minute now to review and discuss the following questions.”

[Read through each of the questions. If you want the group to break up into smaller groups, do so at this point. If you want to open the discussion for the entire group, focus on one question at a time.]

Instructions:

This slide provides an overview of the key topics covered in Module Eight.

Script:

“We spent time in Module Four brainstorming some possibilities for the region’s goals and discussing how to create SMART goals. Today, we will define the direction the region wants to go and begin planning for success. We will finalize the goals and then get down to the nitty-gritty of how we can build a plan that helps us achieve these goals. Our session includes:

- Defining the goals of the regional initiative
- Identifying the ABCs of success
- Selecting appropriate strategies and
- Planning for action”

Session Overview

- Defining the Regional Goal(s)
- Identifying the ABCs of Success
- Selecting Strategies
- Planning for Action



Slide: 3

Time: 1 Minute

Instructions:

During this section, the participants will identify the regional goals they intend to pursue together. It begins with a review of the brainstorming session from Module Four, then moves to building consensus on the final goals.

Script:

“Let’s start by thinking about where we want to head as a region. All of you are no doubt able to pursue meaningful goals individually within your own organizations. However, for this regional initiative to be effective, the team needs to determine a direction you can all embrace.”



Slide: 4

Time: 1 Minute

Instructions:

Over the next few minutes, guide the team through a review of potential ideas developed during Module Four's brainstorming activity to help determine the goals they are interested in pursuing. Take time to add any potential directions that have emerged since that session. This is not the time to debate the merits of each possible direction, but rather to get potential ideas on the table.

Script:

We are ready to hone in on the regional goals that make sense for this region. Let's take a minute to review the ideas suggested during the brainstorming session in Module Four. [Review the list.]

We want to make sure all potential ideas are considered as we move forward to designing the regional plan. Think about this list for a minute. Are there any missing ideas you would like to suggest for consideration? We won't worry too much about debating these yet. We just want to make sure all ideas are on the table." [Allow for responses. Add these to the list.]

Considering Potential Goals

- Any ideas missing?
- Don't get bogged down in detail.
- Consensus is not necessary *yet*.



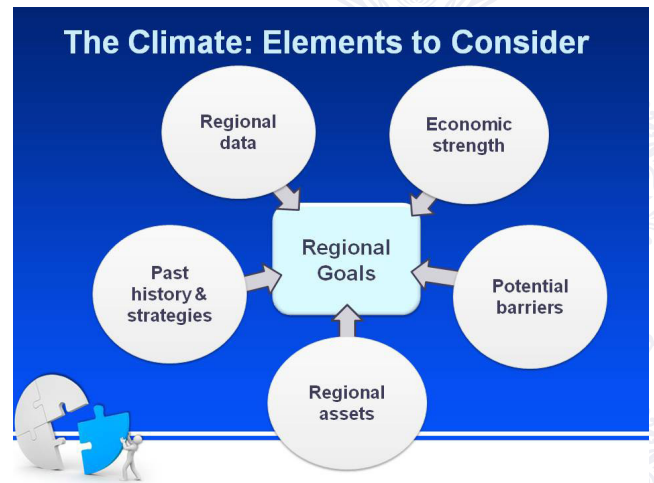
Slide: 5

Time: 15 Minutes

Instructions:

This slide organizes the elements that go into goal selection into a practical model that will be used to consider potential goals.

As participants have moved through previous modules – those dealing with assets and barriers, population and economic data, and potential strategies – they have looked at many, if not all, of the elements depicted on this slide. Now that they have a list of potential goals identified, the next step is to evaluate the goals in light of these elements to see which one(s) seem to be the best fit. The process described in this slide and the next is designed to help the regional group understand the context in which the potential goals would take place. This can be helpful if they seek to prioritize goals or narrow the list of potential goals to a more manageable number. If, however, the group has settled on one or two goals they plan to pursue, walking through the process described for the selected goal(s) will still be of value in strengthening the planning process.



Slide: 6

Time: 1 Minute

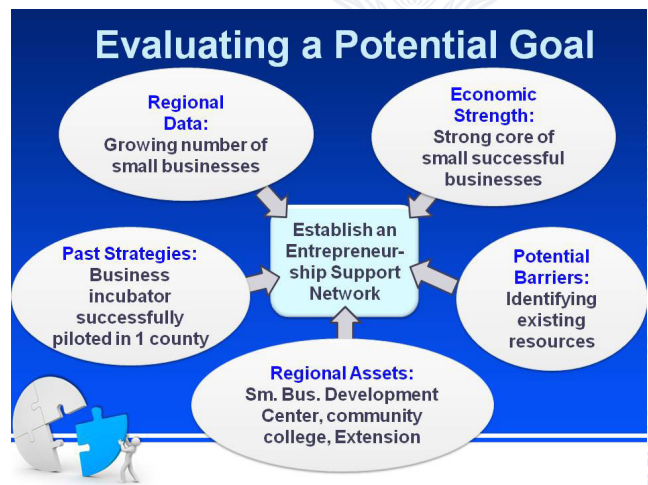
Script:

“Now that you have narrowed the possible regional goals down to [number identified], the next step is to think about which goal(s) best fit the region. When you think about ‘fit’ to the region, consider these elements: what the data tell you, the region’s economic strengths, potential barriers to overcome, regional assets that can support the goal, and past strategies (and their results) related to the goal. Each element helps form a piece of the climate in which the goal would be pursued.

Let’s consider how this might look for a region.” [Go to next slide.]

Instructions:

Using this example OR using one of the actual goals identified by the group, walk through each element of the climate related to the potential goal. Help the participants understand what relates to the goal within each of the elements. Once they understand the model and example, have them develop a similar chart for each remaining potential regional goal. If a number of goals are still under consideration, you may want to divide the regional team into small groups to work on each goal separately. If only one goal remains, the process will still be of value in helping the group through the rest of the planning process. If space allows, have group(s) develop the model on flip chart paper so everyone can see the results. A handout version is also available, if needed.



Slide: 7

Time: 15 Minutes

Handout One: Regional Economic Development Planning Chart (Optional)

Script:

“Here is an example of how these elements might define the climate of a potential goal. Suppose the region decided to establish an entrepreneurship support network to connect potential entrepreneurs to available resources and business coaches to help them successfully launch their businesses. The slide shows some examples of how these five elements might help define the context for that goal. By thinking through these elements systematically, it becomes easier to see which goals may have the needed support in the region.

For the next few minutes, we will define these elements for each of the potential regional goals you have identified.”

[Break the team into small groups as appropriate for the number of goals under consideration. If only one goal exists, you can either walk through this exercise together or have small groups work individually. Ask group(s) to record their responses on flip chart paper to share, or a worksheet version is available if space does not allow for chart work.

Once groups have completed this assessment, have them report back to the group. Depending on what you need to accomplish from here, talk the group through the debrief below.

Script (Cont.):

If groups need to prioritize and/or narrow goals (i.e. they have too many to consider), ask:

- Which of the potential goals seem to have the most support in the current climate?
- What are the weak points within the climate for the potential goals?
- What are the strong points?

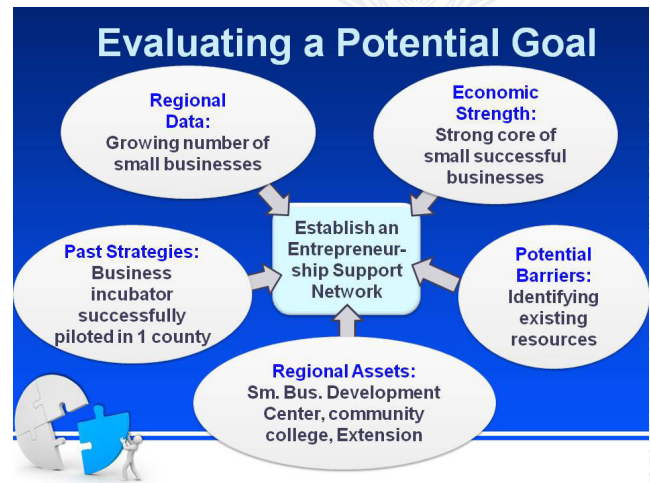
This discussion may lead the group to its own conclusion about which goal(s) to pursue. If it is still not clear:

- You may want to ask if there is missing information that would help inform the decision.
- Or you may want to use the sticky dot voting method to see where the group stands.
- Finally, if the challenge still exists, it may be helpful to ask the ones NOT supporting a particular goal to tell the group what could be changed in the climate to gain their support.

This information may help identify some strategies or simply lead to refining the goal to gain stronger regional support.

If group has already settled on its goal(s), ask:

- What do you learn from this exercise that can help you strengthen the pursuit of this goal?
- What other information or resources may be needed to help in the planning process?
- How can you plan to address the potential barriers?]



Slide: 7 continued

Time: 15 Minutes

Handout One: Regional Economic Development Planning Chart (Optional)

Instructions:

This slide is a reminder of the SMART acronym. Review this slide so participants are prepared to write SMART goals.

Script:

“You may remember this acronym from Module Four. The acronym SMART refers to the five components critical to the development of sound goals. Let’s take a minute to review these quickly:

S means Specific: It’s very important to know exactly what your team wants to achieve. Someone looking at your goal from outside the group should be able to understand exactly what you hope to accomplish.

M means Measurable: Given the increasing attention to accountability, developing measures that allow you to document whether you are moving in the right direction in terms of achieving your goals is vital. Keep in mind that you need to be able to measure the goal you write.

A means Attainable: Avoid embracing goals at odds with the current or anticipated resources available in your region. As we have discussed, the climate is important in achieving goals.

R means Relevant: Pursue goals your team honestly believes are meaningful contributions to regional economic growth.

T means Time-Framed: It is important to have timelines for each of your goals. Let’s face it, if you don’t have target dates, then you are likely to muddle along, having no clear sense of what key actions need to be undertaken and by when. Build a timeline to keep things on track.

Developing regional goals using SMART principles will help your team be more effective and persuasive.”

[Once you have reviewed these elements, provide time for the regional team to write their identified goals into SMART goals. These will be used throughout the remainder of this session. Thus, taking time here to get them clean is important.]



Slide: 8

Time: 20 Minutes

Source:

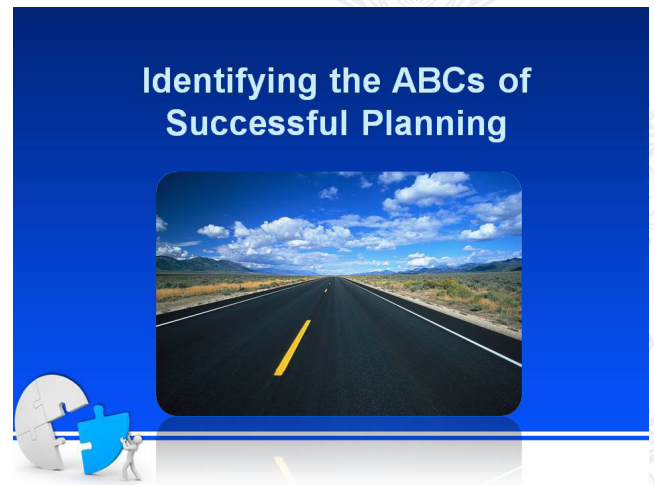
Heathfield, S. M. (2011). Beyond smart goals. *About.com Human Resources*. Retrieved from <http://humanresources.about.com/cs/performance/a/goalsetting.htm>

Instructions:

This transition slide prepares participants to consider the path they will need to take to reach the goals they have identified.

Script:

“Now that you have invested time in sharpening your regional goals, we will begin designing a map that will help ensure you can successfully reach your destination – in this case, your regional goals. During the next few minutes, we will work through a series of important steps to help formulate a successful plan.”



Slide: 9

Time: 1 Minute

Instructions:

During this section, introduce participants to short, intermediate and long-term outcomes, defined as the ABCs of success. These will help the team hone in on specific plans needed to accomplish their goals.

Script:

“It’s probably safe to say that all of us want to be engaged in meaningful work, in activities that really make a difference. Few of us want to simply spin our wheels. How can we be sure we are headed in a direction that is likely to bring about meaningful change? How can we make sure we are pursuing plans that make our hard work worthwhile? When you think about the differences your activities make, you are actually thinking about outcomes, the valuable results of your team’s activities. One easy way to think about the different layers of outcomes is to think of them as the ABCs of success:

- Attitudes, knowledge and skills
- Behaviors
- Conditions

All three are vital to success. We’ll explore these three types in more detail in the next series of slides.”



Slide: 10

Time: 3 Minutes

Instructions:

It is easy for a group to get an idea or direction in mind without thinking all the way to the end of the journey. This slide begins a discussion of thinking through the desired outcomes as a component of selecting the best strategies.

Script:

“We are ready to begin working on an actual success plan that provides practical guidance on making steady progress toward achieving regional goals. Think about the regional goals your team intends to address. Obviously, no one here has a magic wand we can just wave around and poof – the goals are accomplished! Instead, thinking through a step-by-step process will get the region on the road to where you want to be. To ensure that you reach your goal, start planning from your intended destination and work your way back to the starting point. This will improve your chances of moving the regional plans in the right direction.”

Moving Forward: Start with the End in Mind

Successful planning means
thinking with the end product in mind.



Slide: 11

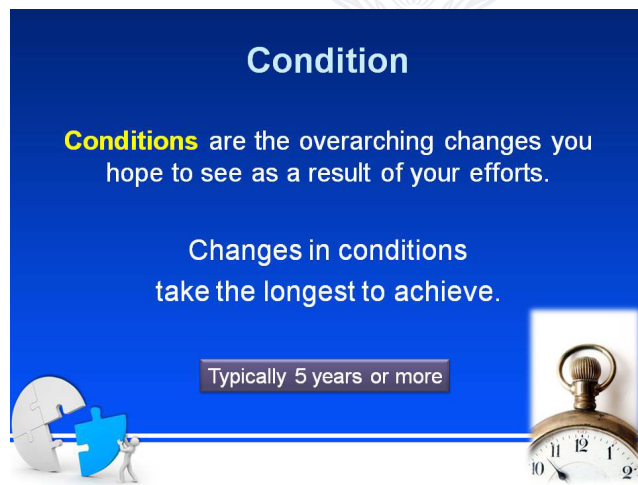
Time: 1 Minute

Instructions:

Use this slide and the next to show examples of conditions to help participants understand the concept of changing conditions, which are long-term outcomes.

Script:

“As we begin to track backwards, the first outcome we will need to consider is a change in a condition. Conditions are the collective results, or the big picture changes, you hope your team will achieve as the regional goals are pursued. Changes in conditions typically take a long time to realize, even when all the other pieces are in place. Let’s look at some examples.” [See next slide.]





Condition

Conditions are the overarching changes you hope to see as a result of your efforts.

Changes in conditions take the longest to achieve.

Typically 5 years or more



Slide: 12

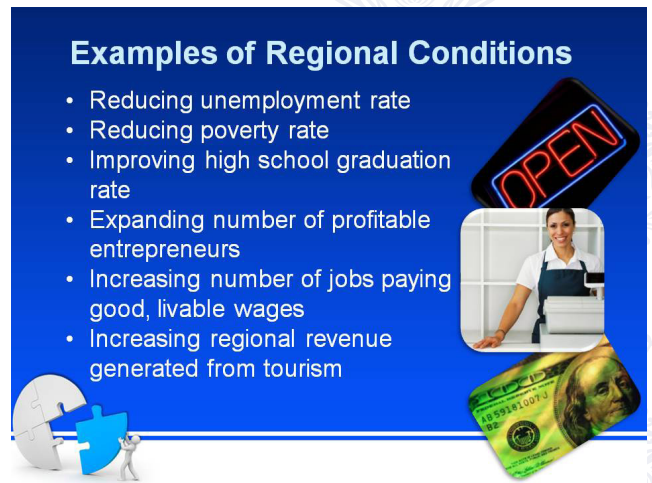
Time: 1 Minute

Instructions:

The examples in this slide represent conditions that will take many years to address. For example, if the region has a high rate of high school dropouts, it will take a good bit of time to change that condition as it may take the involvement of school administrators, teachers, parents, students and the community working on a number of different strategies over time. That is why improving high school graduate rates could translate into a long-term effort.

Examples of Regional Conditions

- Reducing unemployment rate
- Reducing poverty rate
- Improving high school graduation rate
- Expanding number of profitable entrepreneurs
- Increasing number of jobs paying good, livable wages
- Increasing regional revenue generated from tourism



Slide: 13

Time: 5 Minutes

Script:

“Some examples of regional conditions you might be trying to improve over the long haul include reducing the unemployment rate or tackling the poverty rate. What are some other examples we could add to the list?”

[Listen carefully to suggested examples to ensure that they reflect long-term condition changes. If someone suggests something that is a behavior change (intermediate) or a change in knowledge or attitude (short-term outcome), be sure to honor their input by saying something like, “That is truly an important outcome. We may see, though, that it has a place within a different level of outcomes. Let’s think about it together as we go along to see where it best fits.”]

Instructions:

Distribute Handout Two. Participants will use this document throughout this session. The second page is an example of the completed first page, so you may distribute it at this point, or use it toward the end as a final example. If your team has several goals, it may be helpful to divide the group into smaller teams for the remainder of this module. Each small group can work on a separate goal so a good Planning Chart draft for each goal is completed by the end of the session. If, however, you would rather focus on a single goal, have the whole team work collectively on a single goal, and assign the creation of a planning chart for each of the remaining goals as homework.

Script:

“We are ready to begin working on an actual success plan, our guide to help direct our efforts. We will start on the right side of this worksheet and work our way back toward the left side.

First of all, imagine you have been successfully pursuing your regional goals for the past five years. What condition(s) would you hope to change for your region? What difference does your team want to see in the region in the next 5-10 years as a result of your team’s successful activities?”

[Allow time for discussion. Record the answers on a flip chart designed to match the worksheet.]

**Your Plan:
Start with the End in Mind**

Imagine five years from now....

- What do you hope is different in your region?
- What **condition** do you hope to change?

Conditions → Success

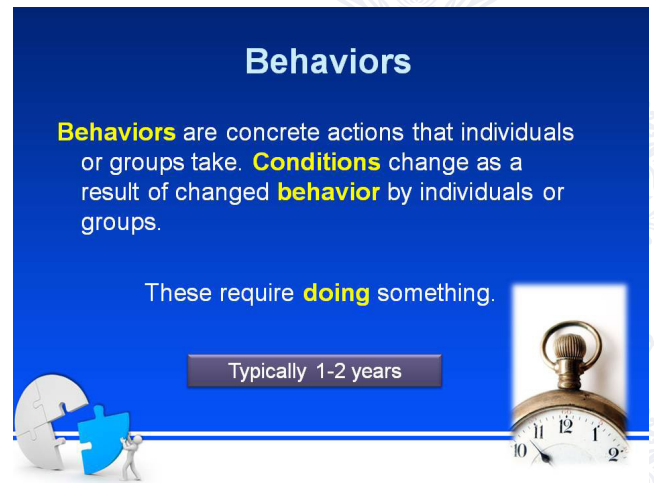
Slide: 14

Time: 10 Minutes

Handout Two: Regional Economic Development Planning Chart and Planning Chart Example

Instructions:

This slide begins explaining intermediate outcomes, ones that generally involve behavior changes of some sort. Work through this section to clarify the kinds of outcomes associated with this category before your participants begin exploring the behavior (intermediate) outcomes that might be most appropriate for their goal.





Behaviors

Behaviors are concrete actions that individuals or groups take. **Conditions** change as a result of changed **behavior** by individuals or groups.

These require **doing** something.

Typically 1-2 years



Script:

“The second type of outcomes to consider is behavior change, when a person or a group does something different than what they were prior to the initiative. The key word is ‘doing.’ This level of change goes beyond learning a skill. For instance, I may take a class to learn how to use computer software in hopes of improving the way I maintain my business records. If I don’t go back to my business and start doing something different (in this case using this software), then I’ve failed to change my behavior. Without the behavior change, my new knowledge will not lead to any shifts in my overall business condition.

Because behavior changes require a consistent adoption of a new action, they can sometimes take up to one or two years before the changes are solidly in place.”

Slide: 15

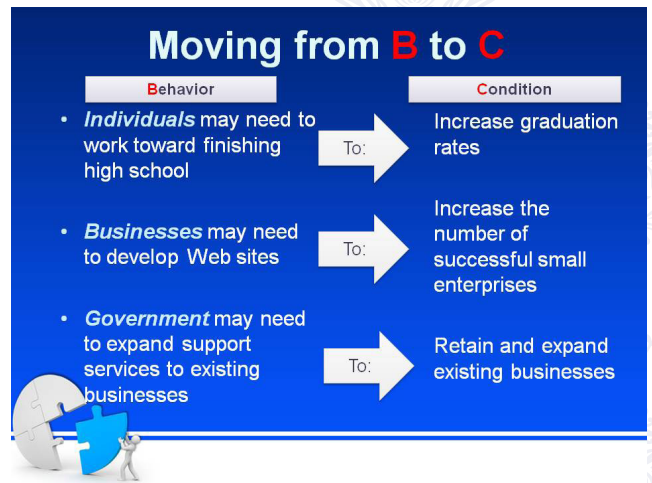
Time: 2 Minutes

Instructions:

The slide provides examples of how behaviors (intermediate outcomes) link directly to condition changes.

Script:

“Here are a few examples of behavior changes linking to changes in conditions. Behavior changes may be needed by individuals, businesses or government (or sometimes a combination of them all) to see overall conditions change in a region.”



Slide: 16

Time: 2 Minutes

Instructions:

Participants are now ready to consider the behavior(s) (intermediate outcomes) they seek through their goals. During this time, they should complete that column in the Planning Chart.

Script:

“Go back to the Planning Chart. What behaviors need to change in order to get to the condition you have identified? These go into the Behavior column to the left of Conditions.

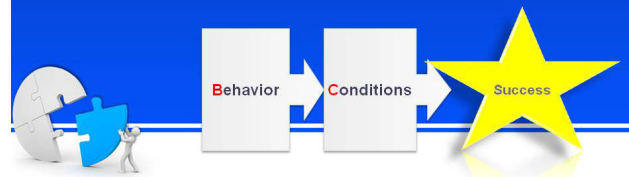
Who needs to make those behavior changes (businesses, individuals, government, etc)? Keep these key players in mind. We will plug them into the plan in a few minutes.”

Your Plan:

Go back to the **condition** you identified.

What **behaviors** need to change to reach that condition?

Who needs to make those changes?



Slide: 17

Time: 10 Minutes

Instructions:

This slide introduces the concept of changes in attitudes, knowledge or skills (short-term outcomes). These require “brain power” or new learning of some kind.

Script:

“We all know that just because we want someone to change his or her behavior, it doesn’t mean it will automatically happen. What does it take to get people or groups to embrace new behaviors? Generally, we change our behaviors when we gain a new perspective or attitude regarding the behavior, learn something new related to the behavior, or learn a skill related to the adoption of that behavior. All of these require ‘brain power.’

At this level, people begin to think differently. They have gained new knowledge, changed an attitude or learned a new skill. Usually, these kinds of changes can happen in a relatively short time. Sometimes new learning can take place in a matter of minutes or over a series of learning opportunities, such as a workshop series that involves multiple sessions. Obviously, the more complex the learning that needs to take place, the longer it will take for a behavior change to appear or for new learning activities to be adopted.

Just like behaviors, these changes typically occur at the individual level, but these shifts also can take place at the organizational level. Let’s examine some examples presented in the next slide.”

Attitudes, Knowledge and Skills

Attitudes, knowledge and skills are elements individuals or groups can learn or develop in a rather short time.

These require **“brain power”** or new learning.

Typically within the first 6-12 months

Slide: 18

Time: 2 Minutes

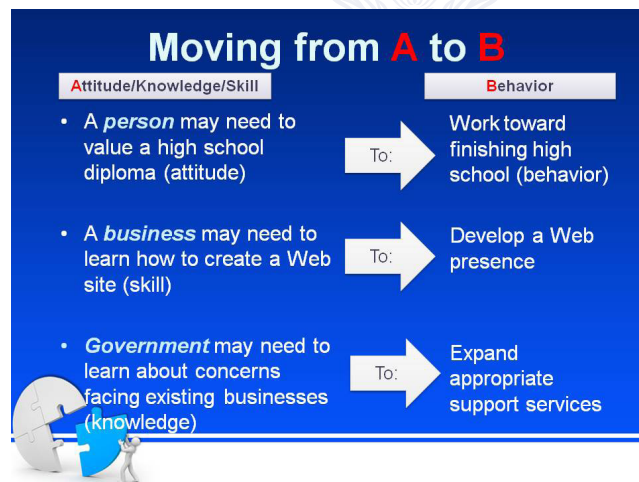
Instructions:

The slide provides concrete examples of how attitudes/knowledge/skill learning (short-term outcomes) link directly to behavior change (intermediate outcomes).

Script:

“Here are a few examples of how individual changes in attitudes/knowledge/skills can lead to behavior changes:

- An individual may need to believe in the value (attitude) of a high school diploma before he or she is ready to invest the work (behavior) of finishing high school.
- A person needs to know (knowledge) how to access job training before he can enroll (behavior) in the training.
- Learning effective job skills has to happen before a person can actually put those skills into effective use on the job.”



Slide: 19

Time: 1 Minute

Instructions:

Participants should build on what they have already entered into the Planning Chart by adding related changes in attitudes, knowledge and skills (short-term outcomes) needed to get to the desired behavior changes.

Script:

“One more step back connects the behavior changes you are seeking with the ‘brain power’ that needs to happen. What attitudes/knowledge/skills will point to the behavior changes you hope to foster? Go back to the Planning Chart and identify the attitudes/knowledge/skills needed to promote the behaviors you have identified. List these in the column to the right of behaviors. Be sure to think carefully about all three kinds of ‘brain power’ – attitudes, knowledge, and skills. All three may spark some new angles to help guide the success of your plan.”

[Stop at this point, and ask for any questions or clarification on these three levels of outcomes. The next slide will change gears toward selecting appropriate strategies. Thus, these outcomes need to be clearly defined before attempting to select a strategy that is appropriate.]

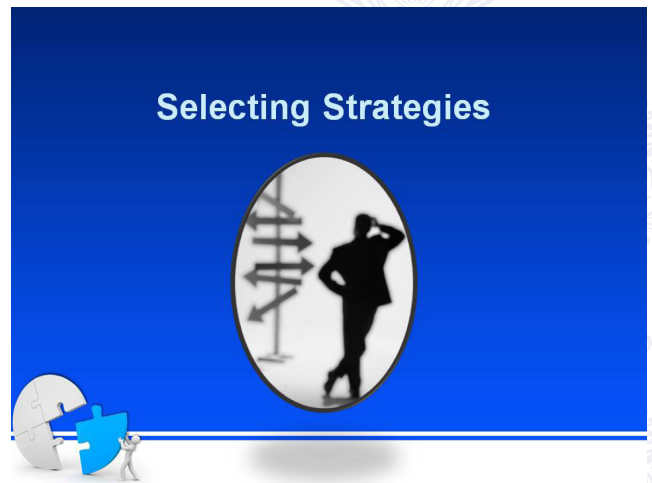


Slide: 20

Time: 10 Minutes

Instructions:

During this section, participants will begin to identify concrete strategies that will help move their region from its current position to the outcomes (ABCs) they have identified as the paths to their goals. As you move through this section, make sure that participants aren't just selecting strategies without carefully considering how the strategies connect to the outcomes. We will discuss this further as we move through the next few slides.



Slide: 21

Time: 1 Minute

Script:

“Now we are ready to get down to the ‘what do we need to do’ part of the plan. Since you have taken the time to trace the pathway back from the goals you have identified through the outcomes you desire, your job here will be much easier. During this next section, we will select appropriate strategies that will complete the path from where we are now to the outcomes we have identified.”

Instructions:

This slide transitions to the strategies the regional team will contribute to the process. The regional partners will need to intentionally select actions that lead their target audience toward the outcomes (ABCs) they have identified.



Script:

“Thinking through the regional team’s strategies involves two parts, the action the regional team plans to take to reach our outcomes and the target audience for that action. Our regional partnership will need to do some things to, for, or with the people we hope to reach so that we can help move them toward the ABCs we have identified. The things we do (such as provide workshops, counseling or technical assistance) are actions we take to help guide people (participants) toward the ABCs we identified. These participants usually involve a specific target group (such as high school seniors, small business owners, local elected officials, etc.)

If you are tackling a complex project, chances are quite good that you will identify more than one action you need to take and more than one target audience. In fact, you will probably consider several options that will help you aim toward your ABCs. The next few slides will help you identify the strategies that will make the most sense for your regional initiative.”

Slide: 22

Time: 2 Minutes

Instructions:

Use the guiding questions on this slide to help the regional team select the strategies that best fit the goals and outcomes (ABCs) they established. Several strategies may have already been mentioned. It may be helpful to stop at this point and have the group list some of the strategies they have in mind that have the potential of linking the region to the desired ABCs. These can be captured on a flip chart for all to view. Instruct the group to refrain from debating the potential strategies at this point. Simply capture ideas for the following discussion. Once the group is satisfied with the potential strategy list, begin helping them narrow down to the most important strategies using the questions on the slide.

Script:

“As you consider all of the possible strategies you might implement, four guiding questions will help you get started on the right track. Which strategies will:

Come closest to producing the desired outcomes (ABCs)? Which strategies are most likely to lead participants to the Attitudes/Skills/Knowledge you identified as crucial to the outcomes you seek?

Appeal most to the target audience? Consider your audience when selecting strategies. Here, one size definitely does not fit all. Choose strategies that fit the people (or groups) you most want to influence. If you aren’t sure what that is, this may be a good time to consider a focus group or some other type approach to ask representatives from the target audience to share their thoughts and insights on the strategies they feel will be best.

Make the best uses of resources and assets? We have spent considerable time researching assets and strengths in the regions. Which strategies make the best use of these valuable resources?

Help overcome key barriers? At the same time, which strategies will overcome, or minimize, the barriers identified in Module Five?”

Strategies: Key Questions

Which ones will:

- Come closest to producing the desired outcomes (ABCs)?
- Appeal most to your target audience?
- Make the best uses of resources and assets?
- Help overcome key barriers?



Slide: 23

Time: 10 Minutes

Instructions:

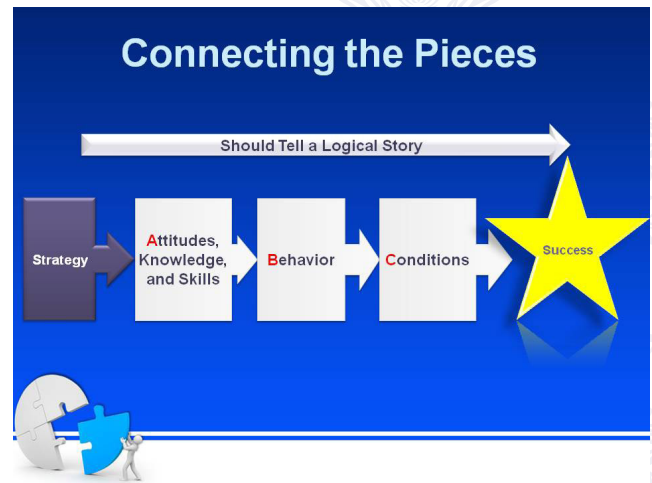
This slide depicts the logical connections that should exist between the identified strategy to the successful accomplishment of the goals. The next slide shows an example of the connections.

Script:

“Once you have identified your strategies, they should provide logical links to the ABCs that the team believes will lead to success. Are the strategies you selected likely to get you to the identified ABCs? If so, you’re off to a great start. If not, now is the time to refine the strategies or recheck your ABCs.

You should be able to tell a logical story that moves from your strategy to changes in attitudes/knowledge/skills, which then leads to changes in behaviors, which results in positive changes in the conditions your team is targeting, and which then results in successfully achieving the goals your team is pursuing. Let’s take a look at an example on the next slide that demonstrates how all of these key pieces fit together.”

[Go to the next slide.]



Slide: 24

Time: 5 Minutes

Instructions:

Use this slide to help participants understand the connection between all of the pieces discussed so far. The top flow chart is the model. The bottom flow chart shows an actual example of how it could all work.

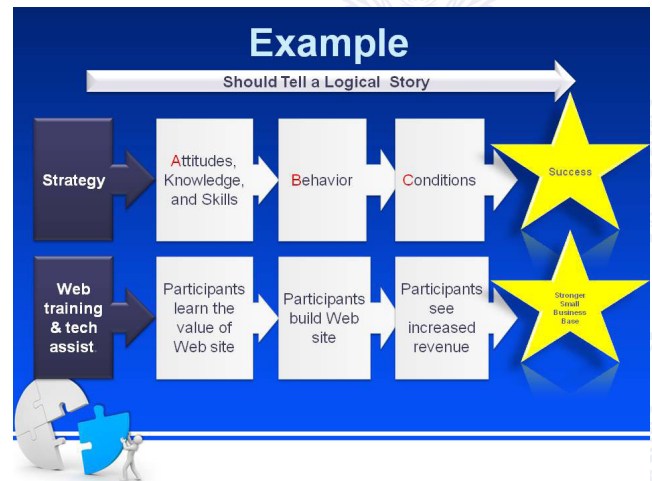
Script:

“Let’s look at a simple business example to see how the pieces interconnect along the way. Suppose we decided to offer e-commerce training and technical assistance to small business owners and entrepreneurs in the region as one of the strategies. Let’s look at the connections to the ABCs.

A small business owner (*target audience*) attends the training (*strategy*) and learns how a Web presence could enhance business sales (*knowledge*). He then decides it is important to create a well-designed Web site (*attitude*), and he learns the ‘how to’ principles of building and maintaining the site (*skill*).

Because of these changes in attitude, knowledge and skills, the business owner actually builds the business Web site (*behavior*). As you can see, the owner did something (*behavior*) with the attitude/knowledge/skills changes that he experienced. Because the business owner launched his site (*behavior*), his annual sales increased and so did his profit (*condition*). This condition, then, helped to successfully reach the overall goal of building a stronger small business base in the region.

Now this, of course, didn’t all happen overnight. The logical connection of all the steps work to improve the economic health of this small business (and others that followed the same path), which, together, improved the vitality of the region’s small business sector.”



Slide: 25

Time: 3 Minutes

Instructions:

Take a few minutes to have participants step back and check their “story.” Does it make logical sense that their strategy will lead to the outcomes and, ultimately, to the goals they have selected?

Script:

“Now, let’s take a few minutes to check your story. Does it have a logical flow – from strategy, to the ABCs and to the goal you hope to reach? Would you be able to explain these important connections to someone outside your group?”

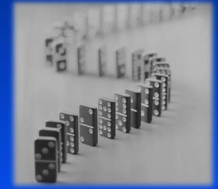
[Facilitate this discussion by either having one or two volunteers tell the story, or have participants pair off and practice the story with each other.]

Are there things that just don’t seem to connect very well that need to be refined? Do you feel the pieces all fit together in a logical way?”

[Allow time for discussion and, if needed, refinement to address any concerns.]

Your Plan: Checking the Story

- Does your strategy match your ABCs?
- A logical story should move from your strategy, through your ABCs, to the success you anticipate.



Slide: 26

Time: 5 Minutes

Instructions:

This slide introduces the last column of the Planning Chart – Assets. Without the appropriate assets, the regional strategies will lack the resources to make the strategies happen.

Script:

“The last piece of our planning chart we want to address is assets. Assets serve as the ‘engine’ for the whole process. They are the resources you need to put the strategy in place. As discussed in Module Seven, assets can include organizations, individuals, cash, meeting space, equipment, and training materials, just to name a few. In fact, anything you have that can contribute to or advance the strategy should be included. Also, this is a good time to consider missing assets that may be needed. Who or what is needed to launch the strategy? This may open your eyes to potential new partners who could have an interest in supporting your efforts.”

Assets: The Engine

Individuals, organizations and resources you will need to implement your strategy



Slide: 27

Time: 1 Minute

Instructions:

Have participants add assets to their chart. Refer back to the assets identified in Module Seven to ensure all possible resources (people, voluntary organizations, institutions) are captured.

Script:

“Take time now to consider the assets you have for your identified strategy. Who will help? What individuals and organizations have committed time or resources to the initiative?”

Are there any missing resources that will keep you from moving forward? If so, what are they and who is likely to be able to help provide the needed resources? How will you seek their involvement?”

Your Plan: Assets

- Identify your assets:
 - What organizations are contributing?
 - What individuals are contributing?
- Are there missing pieces? If so, who can help with these?



Slide: 28

Time: 10 Minutes

Instructions:

Finally, the team will develop a draft of their Plan of Action to guide the next steps of this initiative. Putting an action plan in place will help avoid the problem of having a plan that simply gathers dust on some office shelf somewhere.

Script:

“With the planning basics in place, it’s now time to move that plan into action.

All of us have probably been part of a planning process that never seemed to get off the ground. In some cases, the planning team never took the time after the plan was developed to determine how to carry it out. For the next few minutes, we’re going to discuss a simple tool that will help your team avoid stalling out on your road to success.”

Planning for Action



Slide: 29

Time: 1 Minute

Instructions:

Introduce participants to the basic elements of a Plan of Action so they will be prepared to draft their own plan, which they will be asked to do in the final section of this module.

Script:

“Four basic elements make up a viable Plan of Action:

Specific steps to launch the identified strategy – What steps would need to be taken to help move from where you are now to the point where you are launching your identified strategies? Try to break the steps into manageable ‘bites’ and arrange the bites into a logical order.

A person who will take leadership for each of the steps – The team cannot move forward if you have an ‘unclaimed’ step. Steps should be shared evenly among the partners so the load is not shouldered by just a few partners. Also, avoid assigning steps to ‘all team members’ unless it is a task that everyone really must have a role in carrying out (something that’s pretty unusual for most team assignments). The old adage applies here, ‘Everyone’s job is nobody’s job.’ If a step does need to be shared among more than one person, ask for a ‘lead’ to help keep the step on track.

A realistic timetable for completing each step – Keeping things rolling is vital! Having a timeline for completion of tasks is very important. Avoid assigning deadlines when possible. Instead, ask each person who takes ownership of a task when he can realistically complete the step. This accomplishes a few worthy goals. First, it enhances the individual’s buy-in to the timetable. If I make a commitment to complete a task by a certain date, it carries much more weight with me than if you assign an arbitrary date that does not take into account my other obligations or constraints. Second, it can help identify potential roadblocks or stumbling points. For instance, suppose a person accepting a step indicates he or she cannot complete the step until two months from now. Other steps are now ‘on hold’ for completion of that step. If the two-month delay will threaten forward movement, it may be a good idea to either negotiate the date with the person, or see if someone else would be willing to take on the step within a shorter timeline. Face it, all of us have multiple obligations that sometimes are beyond our control. However, allowing for these discussions can help navigate around at least some of those challenges.

Developing a Plan of Action

Four Key Elements:

- **Specific steps** to be carried out
- **Person** who will take leadership for each step
- **Realistic timetable** for completion of each step
- **Regular checkpoints** to ensure progress & address barriers



Slide: 30

Time: 5 Minutes

Script (Cont.):

Regular checkpoints to ensure progress is being made –



This usually takes the form of regularly scheduled meetings of team members and partners that allow the group to review the progress being made on the Plan of Action.

During the meetings, the person taking a lead role on each step should present a progress report, including any positive steps and any barriers. If a step has been completed, the group can continue moving forward. On the other hand, if a barrier has stalled the completion of a step, the team has the opportunity to work together on possible solutions for overcoming the barrier so progress on the plan can resume.”

Developing a Plan of Action

Four Key Elements:

- **Specific steps** to be carried out
- **Person** who will take leadership for each step
- **Realistic timetable** for completion of each step
- **Regular checkpoints** to ensure progress & address barriers



Slide: 30 continued

Time: 5 Minutes

Instructions:

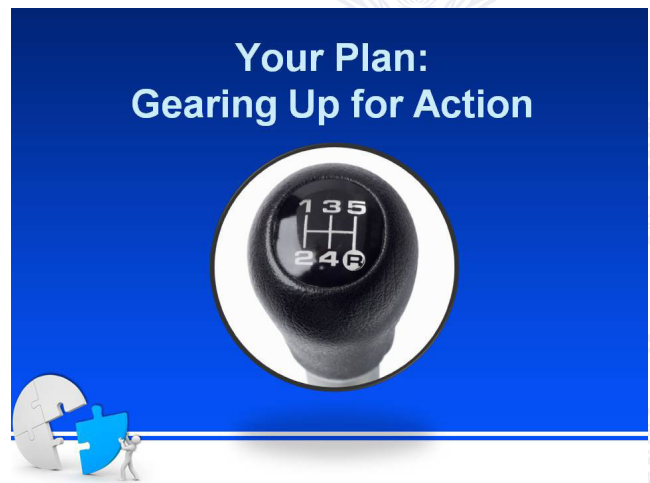
Introduce the Plan of Action Template (Handout Three), and have participants begin to draft the plan. Handout Three also includes a Plan of Action example that can be used as a reference.

Script:

“Using Handout Three, I want you to begin drafting an action plan. As a team, think through the logical progression of steps needed to accomplish the strategy you have selected. Ask for volunteers to take a lead role on each step, and determine a reasonable timeline for completing of the assigned task. Continue to adjust and refine until all identified steps, ‘champions’ and dates are in place in sequential order. Finally, set a schedule for regular meetings to ensure the action plan is progressing. Keep in mind, as you begin meeting, that this is a ‘living, breathing’ document that will need to be refined and adapted as you go.”

[Time may not allow for completing these plans during this session. However, it is important for the team to get a good start so they can understand how the process works. If multiple strategies and goals exist, you may consider dividing the group so different teams construct a plan for each strategy. Be careful, though, since you don’t want to duplicate efforts (which could happen when you divide your team into small working groups). Also, if a team approach is taken, have the teams report back to the whole group when completed so others can react and add to the plan. It is also a great way to ensure the teams are pursuing complementary activities (rather than efforts that are duplicative).

NOTE: This Plan of Action is submitted as part of the SET standards. It should initially cover at least a six-month period.]



Slide: 31

Time: 30 Minutes

Handout Three: Plan of Action and Plan of Action Example

Instructions:

Use the questions on the slide as a debrief of today's session.

Script:

“Let's take some time to reflect about Module Eight. What topics did you find most helpful? What did you find confusing? What do you hope to implement as part of your regional team's activities? Are there any other items you want to mention?”

Final Reflections

Takeaways from this module?

- What did you find most helpful?
- What did you find confusing?
- What do you hope to implement?
- Other items?



Slide: 32

Time: 3 Minutes

Instructions:

If teams have not completed the Planning Charts and Plan of Action for each identified goal, ask them to refine them before your next meeting. Ideally, the group should have the opportunity to review all work on each goal before beginning the final module so they will have in mind a clear picture of the entire regional plan.

Script:

“You have put in a lot of thought and work into today’s module. We have one final module to explore together, as Module Nine will build directly on today’s work. If there are incomplete pieces to this planning process, how can the team work to finish these and review them before the next time we meet?”

[Allow the team to consider options and design a timetable for completing and reviewing the work before the next meeting.]

NOTE: If the team plans to go through Module Eight and Nine on the same day, this homework can follow at the end and include completion of Module Nine activities. It will be very important, though, if this approach is taken, to set a date for meeting together again to examine the finished products and ensure the plan is ready to launch.]

Homework

For each regional goal, complete a:

- Planning Chart
- Plan of Action

These will form the foundation for the final module, *Measuring for Success*.



Slide: 33

Time: 2 Minutes

Instructions:

Share with the participants a preview of Module Nine, which builds directly from Module Eight's work. Reiterate that having these documents completed is important for the team to move effectively through the final module.

Script:

“Now that you have developed a comprehensive Plan of Action, you need a way to measure the progress you make along the way to be certain you continue on the right road to success. Because measuring for success is so important, we will devote an entire module to this critical topic.

We want to build on the good work generated in Module Eight by spending time planning for evaluating these efforts during Module Nine. Before the next session, please be sure you have completed the two pieces of your plan outlined in Worksheets Three and Four.

Specific elements we plan to explore in Module Nine include:

- Exploring the Value of Measuring
- Deciding What to Measure
- Using Measures to Promote Success
- Tracking Appropriate Measures
- Creating a Regional Plan for Measuring Success”

Looking Ahead: Module Nine

- Exploring the Value of Measuring
- Deciding What to Measure
- Using Measures to Promote Success
- Tracking Appropriate Measures
- Creating a Regional Plan for Measuring Success



Slide: 34

Time: 1 Minute

Acknowledgements

The Stronger Economies Together (SET) Program is sponsored by USDA Rural Development (USDA RD), in partnership with the Regional Rural Development Centers. In particular, USDA RD provided financial support for this important initiative while the RRDCs organized the team of land-grant university-based Extension and research faculty who worked on the development of the SET training modules and the generation of the data products.

Key partners involved in the development of SET educational materials include:

- Extension and research faculty from a variety of land-grant universities in the U.S.
- The National Institute of Food and Agriculture, USDA, that works hand-in-hand with the RRDCs and the land-grant university system across the U.S.
- The Economic Development Administration, U.S. Department of Commerce for granting us permission to use selected portions of its *Know Your Region* training products.



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