



Specific

What do you want to achieve?
Where will you focus your efforts?

Measurable

How do you plan to measure progress toward the goal?
What is the end result and milestones along the way?

Attainable

Do you have the resources to achieve the goal?
What factors might prevent achieving these goals?

Relevant

Is this important for your region?
Does this matter or bring benefit to the region?

Time Framed

When do you want to achieve your goal?
What is the target date for accomplishing the goal?



Common Metrics Used to Measure Regional Economic Change

BUSINESS

- Individual business profit
- Job expansion/retention
- Tax base
- Consumer spending

EDUCATION

- K-12 test scores
- SAT scores
- Graduation rates
- Educational attainment

EMPLOYMENT

- Unemployment rates
- Percent self-employed
- Average wage and salary
- Average self-employed income
- Commuting time

HOUSING

- Number of units
- Homeownership rate
- Building permits
- Average building permit value

INCOME

- Median household income
- Average wage and salary
- Average self-employed income
- Poverty rate
- Cost of living

Common Method for Measuring

Attitudes, Knowledge, and Skills

- **Pre/post survey:** A few key questions related to attitudes or knowledge can help you quickly assess a participant's change in these two areas.
- **Skill assessment/demonstration:** When teaching a skill, having participants demonstrate the skill is a great way to see if they have successfully mastered it.
- **Practical application exercise:** Applying key concepts or skills to a practical exercise is another way to check understanding.
- **Willingness to participate in follow-up activities:** Sometimes a participant's willingness to participate in follow-up activities can be an important gauge. For instance, if you conduct an introductory session on an important topic, and participants sign up for the follow-up session, you have some indication of interest. This could be an indirect way to determine that the information you presented in your initial session was effective.

Behaviors

- **Logging behaviors:** This works well for participants who will be part of a program for an extended period of time. You can provide a way for them to monitor a specific behavior, such as using a log or tally worksheet.
- **Monitoring completion of follow-up activities:** Similar to logging behaviors, this method provides participants with a list of activities to complete along the way. Periodic checks with the participants can let you know whether or not your strategy is leading to the behavior you are seeking.
- **Follow-up surveys:** We've all received a survey in the mail or in our inbox asking for input after an event or experience of some kind. These can be useful tools for finding out if the strategy you selected is leading to change.
- **Observation:** Sometimes observation is a good behavior measurement tool. Suppose your regional strategy involved helping participants identify five important changes they each need to make to their business websites. A quick click of a mouse could tell you in a matter of minutes whether or not the participants went back to their shops and put the learning into behavior.

Behaviors

- **Secondary data:** Secondary data are those that already exist, such as Census data or data generated by various local and state agencies. In some cases, these types of data can, by themselves, offer you a way to measure changes in conditions (such as increases in the number of people employed or improvements in local sales tax collections). A word of caution, though, is to make sure you are looking at data realistically tied to your strategy.
- **Follow up with participants:** Using surveys, focus groups or interviews, you can check back with participants from time to time to see how conditions related to your strategies have changed.

Peer Review High Quality Plan (HQP) Scoring Tool

Plan Title	
SET Region	
Phase	
State(s)	
Reviewer	

HQP Attribute Scoring Rubric

Point Value	Rating Standard
4	HQP attribute integration exceeds expectations
3	HQP attribute is acceptable as presented
2	HQP attribute integration needs some work
1	HQP attribute incorporation needs significant work
0	HQP attribute is not present/evident

** As appropriate, please use half scores to assess HQP attributes (i.e. 2.5)*

Evidence-Based

Assets and Challenges- The plan is based upon a strong understanding of the region's current and/or emerging assets and challenges, as well as the demographic and economic features of the region.

Score	Comments

Comparative Advantage- The plan's major strategies are intended to build on the region's comparative economic advantages, especially its key current and/or emerging economic clusters.

Score	Comments

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Practical

Focused - The plan focuses upon a small number of goals. The collective set of goals appears to be well suited to the regional team's capacity (in terms of available resources, including but not limited to person-power, regional assets, and funds). (A good rule of thumb is a maximum of five goals for a group with substantial resources available for plan implementation.)

<i>Score</i>	<i>Comments</i>

Logical - Plan's major strategies, taken together, are designed to achieve the region's clearly stated goals by influencing attitudes, knowledge, and skills to motivate behavior.

<i>Score</i>	<i>Comments</i>

Targets- The plan specifies measurable targets that must be met along the road to goal achievement.

<i>Score</i>	<i>Comments</i>

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Time Periods - The plan includes short-term (typically less than 1 year), medium-term (2-4 years), and long-term (5 years or longer) goals, which build together toward lasting economic improvements.

<i>Score</i>	<i>Comments</i>

Initial Tasks -The plan specifies clear tasks to be completed for at least the short-term timeframe of the plan (the first 6-12 months).

<i>Score</i>	<i>Comments</i>

Responsibility - Plan specifies clearly what person or group (such as a committee) is a responsible for assuring plan implementation takes place beginning with the initial 6-12 months and beyond.

<i>Score</i>	<i>Comments</i>

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Broadly Supported

Broad Participation - Plan was designed with input from a broad range of institutions and highly active persons.

<i>Score</i>	<i>Comments</i>

Public Input: Input on the plan is collected from the general public, including a range of other people and institutions not directly engaged in SET planning.

<i>Score</i>	<i>Comments</i>

Buy-In - Plan has buy-in from key decision-makers in the region.

<i>Score</i>	<i>Comments</i>

Persuasive: The plan helps persuade interested citizens who have not been actively engaged in the development of the plan of the value of pursuing a regional approach to economic development.

<i>Score</i>	<i>Comments</i>

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Focused on Regional Economic Development

Economic Development Focus - Plan is clearly focused on improving the economy.

<i>Score</i>	<i>Comments</i>

Regional Development Focus - The plan is clearly focused on regional economic benefits (as opposed to benefits for a specific town or county)

<i>Score</i>	<i>Comments</i>

Aligned with Regional Goals

Consistent & Connected: The plan is consistent with the region's goals and data. Goals, strategies, and action steps are consistent with each other, and will help the region take positive steps toward the achievement of its regional goals. Logical ties can be seen that connect the actions to the strategies and strategies to the goals, creating a well-connected package.

<i>Score</i>	<i>Comments</i>

Total Score out of 60	0
Average HQP Attribute Score	0.00



The Essential Components

I. Evidence-based

Asset & Challenges: The plan is based upon a strong understanding of the region's current and/or emerging assets and challenges, as well as the demographic and economic features of the region.

Comparative Advantage: The plan's major strategies are intended to build on the region's comparative economic advantages, especially its key current and/or emerging economic clusters.

Focused: The plan focuses upon a small number of goals. The collective set of goals appears to be well suited to the regional team's capacity (in terms of available resources, including but not limited to person-power, regional assets, and funds). (A good rule of thumb is a maximum of five goals for a group with substantial resources available for plan implementation.)

Logical: The plan is logical. Specifically, the plan's major strategies, taken together, are designed to achieve clearly stated regional goals.

Targets: The plan specifies measurable targets that must be met along the road to goal achievement.

Time Periods: The plan includes short-term (typically less than 1 year), medium-term (2-4 years), and long-term (5 years or longer) goals, which build together toward lasting economic improvements.

Initial Tasks: The plan specifies clear tasks to be completed for at least the short-term timeframe of the plan (the first 6-12 months).

Responsibility: The plan specifies clearly which person or group (such as a committee) is responsible for assuring plan implementation takes place beginning with the initial 6-12 months and beyond.

III. Broadly Supported

Broad Participation: The plan is designed with input from actively engaged individuals (devoting 20 hours or more to SET planning) from a broad range of organizations and backgrounds. Substantial diversity of participation can be demonstrated across geography (participation from all the region's counties), across a broad array of sectors (such as business, education, government, economic development, non-profits), and across major demographic groups.

Public Input: Input on the plan is collected from the general public, including a range of other people and institutions not directly engaged in SET planning. Such input, collected through SET-sponsored meetings, focus/roundtable group meetings, on-line idea collection, or other appropriate venues, is used to revise and fine tune the plan based upon the feedback received from the general public.

Buy-In: The plan has buy-in from key decision-makers in the region, as demonstrated by (1) their direct participation in the planning process, (2) the involvement on the SET team of designated representatives with the authority or approval to act on behalf of the decision-makers, or (3) a clearly expressed commitment by the decision-makers to support the regional plan and its implementation strategies.

Persuasive: The plan is written and presented in a format that conveys information to interested citizens in a straightforward, non-technical manner. The plan helps persuade interested citizens who have not been actively engaged in the development of the plan of the value of pursuing a regional approach to economic development.

IV. Focused on Regional Economic Development

Economic Development Focus: The plan is clearly focused on improving the economy. The plan makes clear how each of its strategies is intended to help produce, either directly or indirectly, improvements in the regional economy. The plan should not focus strictly on quality-of-life strategies. Rather, it must embrace strategies that are specifically designed to bring about direct improvements in the regional economy.

Regional Development Focus: The plan is clearly focused on regional economic benefits (as opposed to benefits for a specific town or county). However, the region might, for example, propose a strategy to upgrade five smaller historic Main Streets (perhaps one in each of a region's five counties) under a plan goal on enhancing a tourism cluster in the region. In this case, the strategy would clearly be regional in scope.

V. Aligned with Regional Goals

Consistent & Connected: The plan is consistent with the region's overarching goals, strategies, and action steps are consistent with each other, and will help the region take positive steps toward the achievement of its regional outcomes. Logical ties can be seen that connect the actions to the strategies, and strategies to the goals, creating a well-connected package.



Finalizing the Plan

Region Name:

Today's Date: _____

Training Location: (town, county, state)

Please indicate how useful this module was to your regional strategic effort.

Major Topics	Not Useful	Not Very Useful	Somewhat Useful	Fairly Useful	Vey Useful
Identifying the Region's Outcomes: ABC's (Attitude, Behavior, Condition changes)					
Identifying Strategies to Meet SMART Goals					
Developing a Plan to Track Progress and Adjust the Plan if Necessary					
Developing a Plan of Action					

What might we do to improve this session?

What is your most significant take-away from this session?