



# Stronger Economies Together

Doing Better Together

Session 4: Finalizing the Plan

Rachel C. Welborn, Southern Rural Development Center, Mississippi State University



# SESSION 4:

## FINALIZING THE PLAN

---

### OVERVIEW

Purpose: During this session, participants will:

- Finalize SMART Goals
- Identify strategies to support goals
- Select measures for documenting programs

Estimated Time to Complete: 4 hours

Materials Needed:

- Nametags
- Name tents
- Sign in sheets
- Flip charts
- Markers
- Dominoes

Handouts:

- SMART Goal Criteria (Session 3, Handout 4)
- Regional Economic Development Planning Chart (2 pages)
- SET Measurement Plan (2 pages)
- Ideas & Sources for Measuring (2 pages)
- Plan of Action Chart (2 pages)
- High Quality Plan Guidance Handout (Session 1, Handout 2)
- High Quality Plan Scoring Tool
- Session Evaluation



## Session 4: Best Practices and Cool Ideas

### Overarching Ideas:

- At the beginning of each session, explain what will be covered and how it relates to the overall planning process
- The writing team needs to be making solid progress by now. If not, consider hosting a writing session to catch up with what has been determined so far.

### Participants:

- If multiple goals and/or clusters have been selected, encouraging small group work is likely to be effective.
- With each group, ask the question, “Is there anyone missing from your group that can help or hinder progress?” If so, how will you reach out to them?

### Managing the Time:

- This session lends itself well to small group work. Consider providing a time of guidance, but then also allowing ample group work time.
- This session is also very labor intensive – a lot of work is done to finalize the plans here. Consider the group’s skill level and time commitments. You may want to flex this session over multiple meetings, giving small groups time to work on segments as “homework.”

### Process:

- SMART goals vs. SMART objectives – either will work as long as at least one level has all the components. Without the SMART criteria woven into the process, plans tend to fall flat on action.
- Be sure the group identifies real goals as their top level. For instance, hosting a workshop is not a goal. Use the “Three Whys” to push to the goal. Why do you want to host the workshop? To provide workforce training, perhaps. Why do you want to provide workforce training? To ensure that cluster X has an adequate workforce? Why is that important? To strengthen cluster X in the region. Why is that important? To grow the economy. When you get to “to grow the economy” or a similar broad statement
- Feel free to use a different planning style to reach the end goal of identifying:
  - Goals
  - Strategies/objectives
  - Measures (short, medium, and long)
  - Plan of work
- The area where plans tend to be weakest is in the Plan of Work. Be sure it has step by step direction on who will do what by when to move toward the goals. This should cover at least the first six months of work and should be living, breathing documents that are updated at each subsequent meeting during implementation.

- This is also a good time to consider introducing the Leadership module. You may want to skip the first few slides that talk about how the group might form OR you can use these to say “this is where we started...do we continue with this structure?”
- Many groups begin to consider how they will be organized from this point forward in terms of ability to receive and manage resources (grants, etc.). Some form 501(3)c organizations while others select an existing organization. Some thought should go toward this decision as the planning process nears the end.
- Set goals and deadlines for completing the writing.

## SLIDE 1

## INSTRUCTIONS

Have this slide up when participants enter the room.

**Icebreaker/Opener**

Divide the group into teams of 3-5 people.  
Give each team the same number of dominoes  
(depending on space, typically 15-20 is good).

On a table for each team, place three dominoes  
set with several inches between (see picture).

Instruct the team that their goal will be to  
knock down all three dominoes but once the  
competition starts, they can only touch one  
domino (you determine which one based on  
how you've set it up.)

Their task, then, is to align their remaining  
resources (aka dominoes) in order to ensure  
that their starting action (pushing over one  
domino) will result in the identified goal  
(knocking over the other two dominoes).

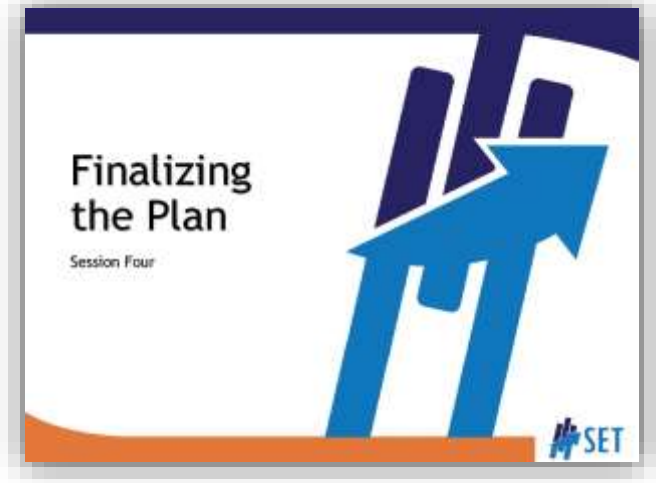
Set a short timer (again, depending on the size  
of the group, but typically 5 minutes is ample.)  
Once each team is ready, have each team take  
turns testing their work.

**Debrief:**

Explain that today's work is to identify the  
actions and measures that will lead to  
successfully accomplishing the regional goals.

Ask:

- How do you see this exercise mirroring that work?
- If there were groups that were unsuccessful, what lessons could the group take?
- If all groups were successful, ask what could have happened to prevent success?

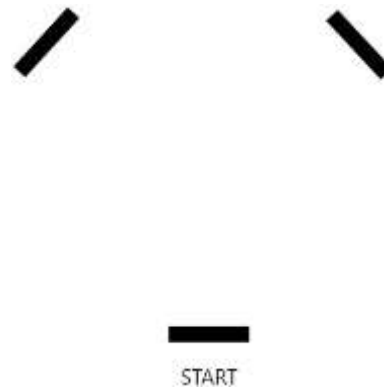


SLIDE #1

TIME: 10 MINUTES

SUPPLIES: DOMINOES (ENOUGH TO HAVE  
15-20 PER SMALL GROUP OF 3-5 PEOPLE)

HANDOUTS: NONE

DOMINOES SET UP

## SLIDE 2

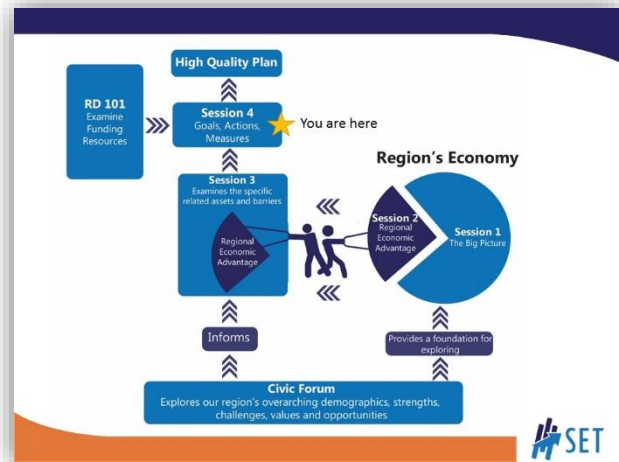
### INSTRUCTIONS

#### Goal: To explain the SET process

Using the graphic on the slide, explain the SET process and how all the sessions will build together toward the High Quality Plan.

Key talking points:

- The Civic Forum provided a foundation from which the remaining sessions will build. The exploration of the region's demographics, strengths, challenges, values and opportunities are important initial steps to developing a regional plan.
- Session One will provide an overview of the region's economy, resulting in the identification of a few areas within the region's economy that warrant a deeper look.
- Session Two will explore those identified areas within the region's economy and result in identification of key regional economic advantages.
- Session Three will examine the assets and challenges unique to the region's economic advantage, drawing from the information gathered at the civic forum.
- Session Four will step through the final planning stages to develop goals, actions and measures.
- RD 101 will help identify potential funding sources to facilitate the region's work.



SLIDE #2

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 3**  
**INSTRUCTIONS**

**Goal: To outline the purpose of this session.**

Set the stage for this session by reviewing the bullets on the slide.



SLIDE #3

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 4

## INSTRUCTIONS

**Goal: To finalize goals.**

[NOTE: If the region has decided to focus on SMART objectives rather than SMART goals, you may wish to shift this slide down and reframe as objectives. Either way, the group should agree together on the goals before moving forward.] Before progressing toward the next steps, get reports back on refined SMART goals from the previous session.

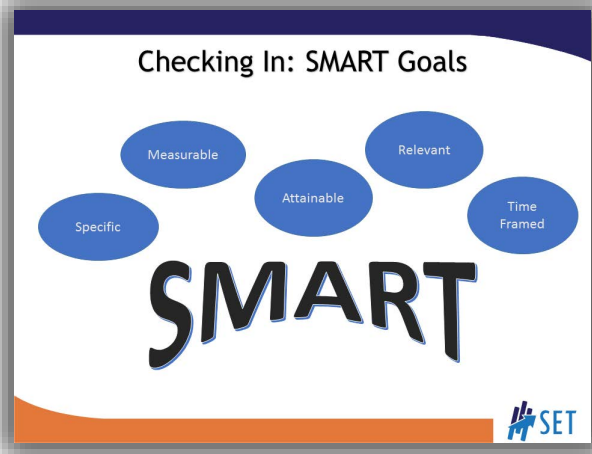
Two important tasks of this step are:

- Ensure that goals are written in SMART format
- Ensure the larger group has buy-in to all of the goals.

Ask a representative from each group that formed goals to read the refined goal. It may be helpful to have them write these on flip chart paper before sharing. Ask the group:

- Does this meet the SMART criteria?
- Is this a goal that we can see as valuable to our regional economic plan?

Once the group is satisfied with the goals they have selected and have refined them to their final version, the group is ready to progress.



SLIDE #4

TIME: 10-15 MINUTES

SUPPLIES: FLIP CHART AND MARKERS

HANDOUTS: SMART GOALS CRITERIA FROM PREVIOUS SESSION



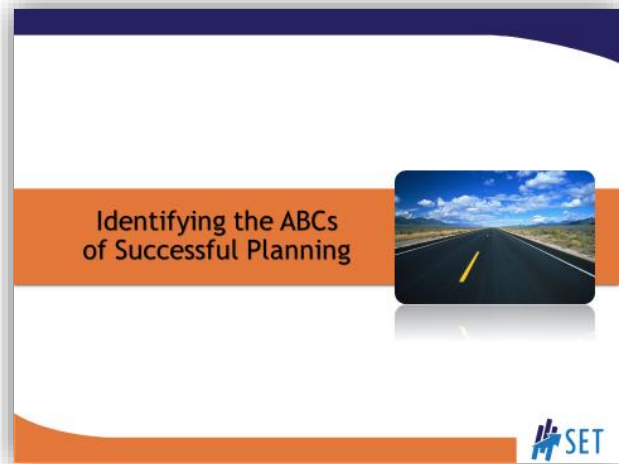
## SLIDE 5

## INSTRUCTIONS

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

At this point, the coach can either:

- Play the ABC video
- Walk through the section and provided needed explanation along the way



SLIDE #5

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: REGIONAL ECONOMIC  
DEVELOPMENT PLANNING CHART  
(HANDOUT 2)

ABC VIDEO LINK:  
[HTTPS://YOUTU.BE/EVMDOP7FOMG](https://youtu.be/EVMDOP7FOMG)

## SLIDE 6

## INSTRUCTIONS

SLIDE #6

TIME: 5 MINUTES

SUPPLIES: FLIP CHART PAPER, NEWSPRINT,  
OR WORD PROCESSING TABLE DISPLAYED  
ON SCREEN

HANDOUTS: SET PLANNING CHART  
(HANDOUT 2)

The slide features a title 'Start with the End in Mind' at the top. Below the title is a diagram consisting of a yellow square labeled 'Conditions' with a yellow arrow pointing to a blue star labeled 'Success'. Below the diagram are two bullet points: '•What do you hope is different because of SET?' and '•What conditions do you hope to change?'. The SET logo is in the bottom right corner.

**Goal: To identify the long-term changes the region seeks through its goals.**

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 in order to ultimately select the best strategies. The group will spend the next 20-30 minutes designing a plan aimed at success.

You may guide the participants to identify short, medium and long term outcomes in a number of ways. Below is one example of how this can be done. Regardless of the method you choose, ensure that the responses are captured in some visual format that can be preserved and translated into the plan document.

Advance preparation: Either set up two flip chart pages side by side, a segment of newsprint, or a chart in a word processing program that can be displayed on a screen large enough for participants to see. Use handout 2 as a guide with the top 3 boxes on the left leading to the 3 boxes on the bottom, 6 boxes (or columns across). Place one of the region's SMART goals at the top of the page.

While you will be walking the group through one example together, allow time after each step for participants to complete that step for the other goals. If the group is large enough, you can divide them into small teams so that you alternate walking the group through the example (using a real goal), then give them time to complete the step for their goal. Be sure to give check in time either after each step or at various intervals (such as after the ABCs, then after the strategies, then after the measures) to allow groups working on other goals give and receive feedback with their counterparts. The small group work can be done on large charts like you will use for the example or can be done directly onto the planning chart.

For that goal, ask participants to consider what success will look like. In other words, 5-10 years down the road, if the efforts towards this goal have been wonderfully successful, what changes in the regional conditions would they expect? Explain that conditions are overarching changes they hope to see as a result of their efforts. It generally can take more years to see changes in conditions so thinking 5-10 years out is usually a reasonable time period. These are long-term outcomes for the goal.

Record responses in the far right hand column on the chart. Listen carefully for responses as descriptions of behaviors or suggestions about changes in attitudes, skills or knowledge will go in a different column.

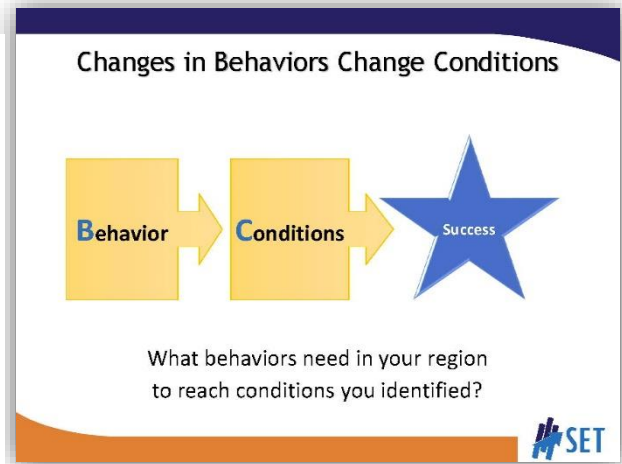
## SLIDE 7

## INSTRUCTIONS

**Goal: To move the region to intermediate outcomes, which tend to be centered on behavior changes.**

During this section, introduce participants to intermediate outcomes, defined primarily as behavior changes in the ABC model. For the elements within our control, conditions do not change without behavior changes. For instance, a person won't get to their ideal weight without changing eating habits and/or changing exercise habits. People generally get that example.

So, ask participants to consider what behavior changes would have to occur to change the conditions identified in the previous exercise. This will not be what they, as a regional planning team, need to do differently. Rather, this focuses on what behaviors they hope to impact by their work. Add responses to that portion of the chart you are developing in the column just to the left of Conditions.



SLIDE #7

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 8

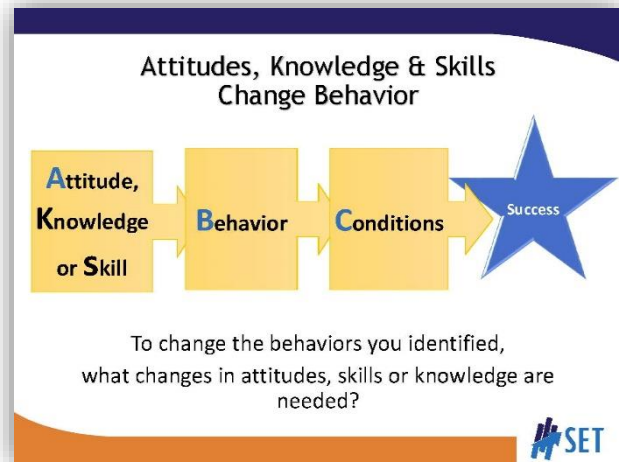
## INSTRUCTIONS

**Goal: To help region identify short term outcomes, which tend to be centered on changes in Attitudes, Knowledge or Skills.**

Generally, behaviors change when people think differently. This can include new knowledge, changed attitudes, or gaining a new skill. This can happen fairly quickly, so tend to be short term outcomes. One note that is sometimes challenging here is the difference between learning a new skill and a behavior change. Going back to the simple example of losing weight, I might take a class and learn to cook in more healthful ways. That is a skill. However, if I take that skill home and begin using it on a regular basis, then I am practicing a behavior change.

Continuing to build backwards on the chart, ask the participants to identify the attitudes/knowledge/skills needed to prompt the behavior changes they hope to foster. List these in the column to the right of behaviors. Be sure to prompt participants 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 the 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. This is also a good time to stop and check in with other groups working on other goals if you have not already stopped to hear feedback.



SLIDE #8

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 9

## INSTRUCTIONS

**Goal: To identify the strategies needed to move the goal forward.**

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. This involves two parts: (1) the action the regional team plans to take to reach the outcomes and (2) the target audience for that action. The regional partnership will need to do some things to, for, or with the people so that you can help move them toward the identified ABCs. The things the regional team does (such as provide workshops, counseling or technical assistance) are actions the team takes to help guide people (participants) toward the ABCs identified. These participants usually involve a specific target group (such as high school seniors, small business owners, local elected officials, etc.)

In order to reach a complex goal, chances are quite good that the participants will identify more than one strategy and more than one target audience. The next few slides will help clarify the strategies that will make the most sense for the regional initiative.



SLIDE #9

TIME: 2 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 10

## INSTRUCTIONS

**Goal: To refine the list of strategies for each goal.**

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.



Once decisions are made about the strategies to pursue, add these to the relevant columns in the chart you have been developing. Be sure to include target audiences for the various strategies.

This is another good check point for other groups working on goals.

### 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 & assets?
- Help overcome key challenges?
- Be likely to spur the growth of the identified clusters?

SLIDE #10

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 11

## INSTRUCTIONS

**Goal:** To ensure the logical connections among the various pieces identified (this is a component of the High Quality Plan evaluation).

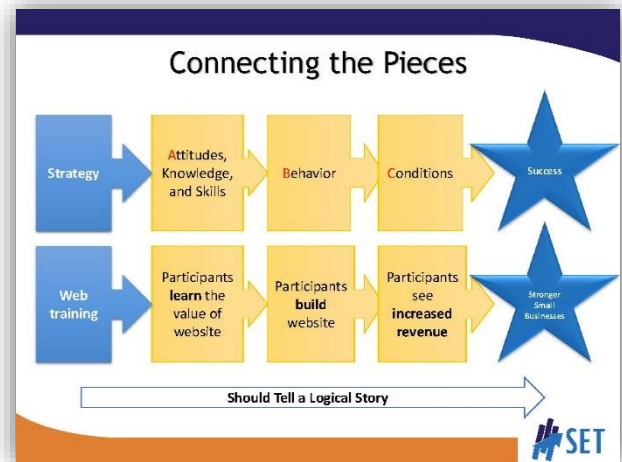
Use this slide to help participants understand the connection between all of the pieces discussed so far. The top flow chart is the model. The bottom flow chart shows an actual example of how it could all work.

In the simplified example, suppose the region decided to offer e-commerce training and technical assistance to small business owners and entrepreneurs in the region as one of the strategies. The connections might go something like this:

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 website (*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 website (*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.

At this point, ask each group working on the separate goals to tell a quick story showing the connections to the pieces. To keep it energized, you might even set a timer. Five minutes should be more than enough. A really tight story can usually be told in under two minutes. However, this is important AND is one of the criteria for a high quality plan so be sure to give it attention.



SLIDE #11

TIME: 5 MINUTES PER GOAL

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 12

## INSTRUCTIONS



**Goal: To begin exploring measures for the plan.**

This slide sets up the scenario where a strategy has been implemented over time with no apparent success. Using the example on the previous slide or the actual goal chart you have developed, have the regional team consider the question on the slide. A good visual way to help people to think through this is to record responses on sticky notes. As a person suggests a potential point of failure ask that person (or a recorder) to jot it on a sticky note. Then place the note directly over that part of the chart. Once all of the suggestions have been made. Have the small groups work through the same process for the other goals.

Then, using the sticky notes as guides, have each small group consider which of these would be most important to track. Remind the group to consider multiple points along the way rather than just one point (short, intermediate, and long-term measures).

### Tracking Progress on the Plan

- **Problem:** You have followed your strategies for five years, but your desired condition is not being reached.
- **Discussion:** What are some possible points at which the strategy failed to produce the desired condition?

SLIDE #12

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE



## SLIDE 13

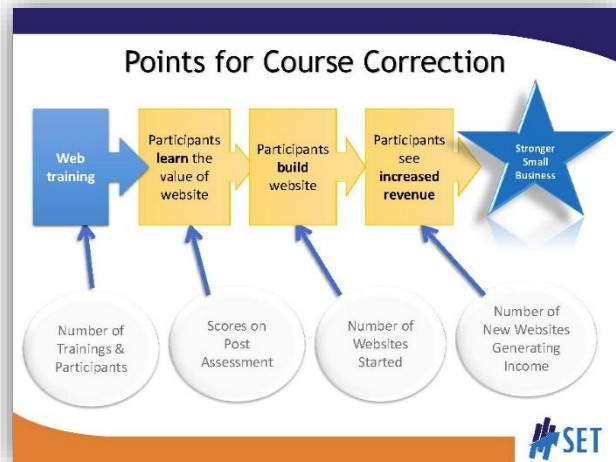
## INSTRUCTIONS

**Goal: To provide an example of appropriate measures along the way toward a goal.**

This slide assembles all the check points that can help re-direct or refine a strategy, which can ultimately help the team reach its goals successfully. Talk through how each of these can help identify a potential course correction to keep the initiative on track toward the goal. Have participants consider how they could correct a course at any of these steps with information from the potential measures.

For instance:

- Measuring the number of trainings and participants tells us whether or not our marketing materials are working to bring people to the sessions. It may also tell us whether our choices of dates/times/locations are ideal.
- Post assessments can give us an idea whether or not the participants understood the material presented.
- Number of websites started gives us a glimpse at potential needs for technical assistance or other implementation needs.
- Websites generating income may help in tweaking the quality of sites as business owners progress.



SLIDE #13

TIME: 3 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 14

## INSTRUCTIONS

**Goal: To begin framing out a measurement plan.**

Once each group has determined which elements were most important to measure, use this framework and SET Measurement Plan handout to develop a measurement plan for tracking what is most important. As each team works through this task, encourage them to make meaningful but realistic choices about what to measure. A delicate balance exists between trying to measure too much and not measuring enough. The Ideas & Sources for Measuring handout may provide some ideas.

Once the measurement plans are drafted, ask participants to consider what the 3-5 things are across the planning chart that matter the most to track. This will give the participants some good ideas about where to focus their attention if they cannot measure the entire contents of the plan. Another way to help narrow the content is to consider what they would like to be able to share in a success story related to this goal in 5 years. Because of our work on this goal, we have....



SLIDE #14

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUTS: SET MEASUREMENT PLAN  
(HANDOUT 3)IDEAS & SOURCES FOR MEASURING  
(HANDOUT 4)

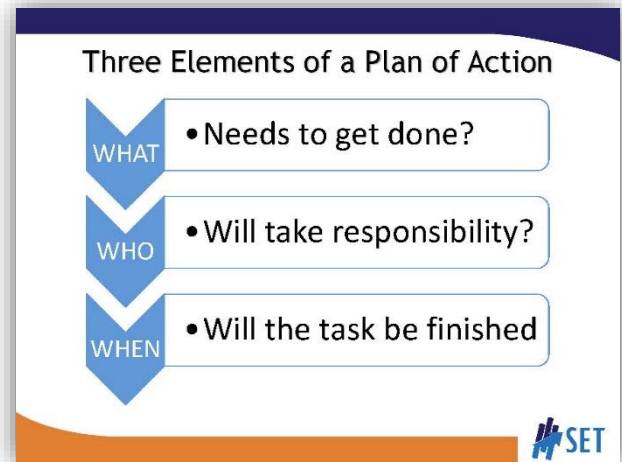
## SLIDE 15

## INSTRUCTIONS

SLIDE #15

TIME: 20 MINUTES

SUPPLIES: NONE

HANDOUTS: PLAN OF ACTION CHART  
(HANDOUT 5)**Goal: To guide the development of a Plan of Action**

Introduce participants to the basic elements of a Plan of Action so they can draft their own plan. This is a key element of the High Quality Plan as it demonstrates responsibility, initial tasks and timelines. Descriptions and some guiding thoughts for each are below. A number of different processes can keep this work moving. One approach would be for each group working on a specific goal to outline the steps needed on a flipchart and then go back and number them in order. Next they would identify a person to take lead on each step. One rule: they cannot put someone's name on that is not in the room. If someone is needed for the plan of action that isn't present to volunteer, then an action step has to be that someone in the room will contact them to gain their support. Next, the person volunteering identifies the date they can have the task complete.

Three 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? Have the teams 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

This is a significant component of the region's High Quality Plan. It demonstrates responsibility, initial tasks and timelines, which are all important elements in the plan. This document is recommended as an addendum to the plan to help demonstrate these elements."

## SLIDE 16

## INSTRUCTIONS

**Goal: To outline the final steps toward submitting a plan for review.**

Finishing this planning process does not mean the work of SET is over. In fact, it is just beginning. Just as having a house blueprint is not the same thing as building a house, having a regional plan does not mean you are building a regional economy unless you put the plan into action. Use this slide to solidify plans to complete the regional plan, in keeping with the High Quality Plan Guidelines, and to present it to the State Partner Team and Peer Review Process for feedback and guidance. Feel free to add other steps appropriate for your region to ensure that the plan is completed and put into action.

### Next Steps




- Finalize regional plan
- Check against High Quality Plan Guidelines
- Present to State Resource Team for feedback and guidance
- Submit for Peer Review
- Other thoughts



SLIDE #16

TIME: 5-10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 17

## INSTRUCTIONS

**Goal: To remind participants of the elements of a High Quality Plan.**

This slide serves as a reminder of the building blocks to the High Quality Plan. Refer the group also to the ***High Quality Plan Guidance Handout from session 1.***

One good exercise to help the group think more objectively about this is that ask them to score their own plan individually once the pieces are all put together. This may be an eye-opening experience, particularly if some in the group have not been at every session.



SLIDE #17

TIME: 5 MINUTE

SUPPLIES: NONE

HANDOUTS: HIGH QUALITY PLAN  
GUIDANCE HANDOUT (HANDOUT 2 FROM  
SESSION 1)

HIGH QUALITY PLAN SCORING TOOL  
(HANDOUT 7)

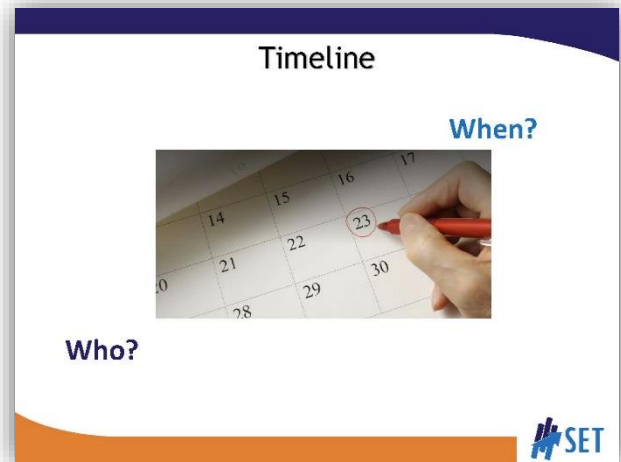
## SLIDE 18

## INSTRUCTIONS

**Goal: Ensure team is on the same page with dates for the tasks moving forward.**

Take time to agree on the timeline moving forward along with the tasks to be accomplished (such as finalizing writing, internal reviewing, setting dates with the State Resource Team for review, etc.)

Additionally, ensure that a specific person (or small group) is taking responsibility for each step that needs to be accomplished.



SLIDE #18

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

SLIDE 19

INSTRUCTIONS

Insert your own contact information and any logos you choose.



SLIDE #19

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE