

Strategic CED Planning (& Plan Updating)

Description

It is not enough to just pick up opportunities for community betterment as they happen to appear on the horizon. A systematic campaign is required for effectively building community resilience and capacity. That means that the community must plan carefully - and strategically. It means creating the opportunities, not just waiting for them. In a “strategic” plan the available or expected resources (people, finances, infrastructure, etc.) are matched and integrated with intermediate objectives, timetables, and techniques to attain a set of over-all or ultimate goals or vision. Also, each part is adjusted to the needs for achieving the other parts of the plan.

To construct a realistic plan, information is first gathered that is considered significant for community transformation. That may include an **Inventory of Skills**, an **Inventory of Businesses**, an **Inventory of Organizations**, and a **Mapping of Consumer Expenditures** to highlight the patterns of the local expenditures that create the economy. It may also include such things as a review of natural resources, resources for entrepreneurship, or other special issues of relevance to your particular community. The ultimate objective is to have a good idea of the key dimensions of local resilience in the face of change and how these are represented in the community today. (*The Community Resilience Manual* is especially good on this.) The information thus gathered underlies and makes reasonable the vision of a positive future that the community has portrayed. The plan then uses the vision and the information to chart a practical path to the future.

The process of laying out a strategic plan for CED is just as important as the plan itself. It is that process that builds the strong foundations for community approval and for the commitment of all community sectors to achieving the goals. While planning is a complex task that cannot be done in large public meetings, the general interests and needs of all sectors have to be recognized and accommodated by the working group that actually works out the plan details.

If the initial **Community-Wide Visioning** process has been successful, those interests will have been recognized and represented in the make-up and operations of the planning group, as well as in the ideas to be implemented. Good planning involves widespread citizen participation (see **Building Citizen Participation**).

The ultimate product, the strategic plan itself, is the guide to action that a CEDO will use over a period of years. Yet because opportunities appear and disappear, resources shift, and time

changes all things, the plan cannot be unchangeable itself. It will require periodic up dating; a good plan plans for that up-dating attention.

Benefits

As implied, the chief pay-off for a strategic plan is that it greatly increases the likelihood that the community will get to where it aims to get. It offers a standard by which everyone can gauge how successful the CEDO (and the community) has been in its efforts. And it provides an understandable rationale and the criteria for allocating community resources. It may even help guide decision-making by other local organizations besides the CEDO.

Major challenges

The major challenge is quite simply managing and maintaining the sustained effort that producing a concrete plan entails. If you really want to lay out who, by what dates and with what resources, are to achieve which objectives - and all of that in the context of the other objectives and the particular paths to them - it is quite a job. Each community will have to decide on the level of detail that seems most appropriate within the scope of the planning resources themselves, the people, the dollars, and the time to do this job.

Some practical steps

1. Assemble the representative team of folks who can commit the time required and who are credible to the community. Be clear on who, if not the team itself, has the final approval function. Most efficiently there would be a CEDO board, which must ultimately adopt the plan, if that board is not itself the planning team.
2. Break up the team into smaller task forces to concentrate on the different substantive areas, such as business development, human resource development, financial support, etc., as are implied in the vision statement and the mandate to the team. Each task force may determine whether enough data is available or whether they will have to undertake further research.
3. Try to concentrate effort in extended sessions of at least several hours each, perhaps for some entire weekend(s), as the tasks seem to require. Perhaps the level of detail expected for the entire plan allows an initial draft to be handled in one weekend; if so, then someone else will have to be delegated to do follow-up detail work, and that too has to be part of the plan.
4. Hold feedback sessions of task forces, in which the entire team can reflect on and integrate what each task force comes up with.
5. When the plan has been completed in an early draft, test it out informally with some key sectoral leaders to see if they find any serious limitations that can be dealt with; but don't expect them to necessarily approve it fully at that point.

6. Seek a final general approval of the plan, in the manner that you had specifically intended.
7. Present the plan in a community meeting, with attendant celebration.

Resource organizations & contacts

There are, fortunately, many experienced organizations that work with CEDOs and communities on strategic planning for CED. They can be reached through the Canadian CED Network (toll free 877-202-2268).

Publications

- *The Community Visioning and Strategic Planning Handbook* (National Civic League, Denver, CO, tel. 303-571-4343)
- *The Entrepreneurial Community: A Strategic Leadership Approach to Community Survival* (The Heartland Center for Leadership Development, Lincoln, NE, tel. 402-474-7667). This publication uses the context of the small community for a lot of practical ideas on the process of community mobilization and planning for economic resilience.
- *Take Charge: Economic Development in Small Communities* (North Central Regional Center for Rural Development, Ames, IA, tel. 515-294-8321). Especially good for community workshops.
- *Strategic Planning for the Community Economic Development Practitioner* (Centre for Community Enterprise). An examination of strategic planning focussed on First Nation CEDOs but relevant for other settings. Order from the “planning aisle” of the CED Bookshop at www.cedworks.com or call toll-free 888-255-6779.
- Avrom Bendavid-Val, *Local Economic Development Planning: From Goals to Projects* (Report No. 353, American Planning Association, Chicago, IL, tel. 312-431-9100). A broad and insightful perspective.
- Eileen M. Mulhare, “Mindful of the Future: Strategic Planning Ideology and the Culture of Nonprofit Management,” *Human Organization* (1999) 58: 323-330. This provides a thoughtful skeptical counterpoint to the idea that strategic planning is a must.