

Appendix B

Worksheets

The following worksheets are designed for a community to walk through the community strategic planning process.

WORKSHEET 1 – *Getting Started: Planning to Plan*

B. Who is in charge of this effort?

1. Will the City Council be in charge, or should another community group be the leader of the effort?
2. Are there reasons why one group should be in charge instead of another?
3. Who will be responsible for making all the necessary arrangements for meetings and notices?
4. What group is going to have the authority to ensure that the results of the planning process will yield results?
5. Which groups can motivate and identify the necessary resources to effect the suggested changes?

WORKSHEET 3 – *Developing the Plan “Focus”*

A. Assess the current conditions in the community by conducting an environmental scan.

1. **Population data** – historical and projected.

What is our current population? _____ What was it ten years ago? _____

Projections +10 years if available _____

2. **Community facilities** – water, sewer, transportation, telecommunications, housing, recreation, education, health services, employment.

a. What is the status of our water system? Age, capacity, problems, needs?

b. Sewer system? Age, capacity, problems, needs?

c. What transportation facilities are available? Highway, rail, truck routes, buses, public transportation? Age, capacity, problems, needs?

WORKSHEET 3 – *Developing the Plan “Focus”*

l. Is public safety being addressed for all individuals in the community? What services do we have for fire, police, and rescue situations?

m. What health care services exist in the community? Is the entire population being served? Are there special programs for given segments of the population?

n. What does our community look like? Are there aesthetic improvements that need to be made?

Community “Strengths and Weaknesses” Survey Example

DCCA used the following survey to elicit strengths and weaknesses:

One of the important things we would like to learn about is your perception of the quality of your region’s economic institutions and community assets. For each of five categories of development factors, we will ask you to rate the quality of the institution/asset in your region. At the same time, you will be asked to indicate the level of priority you would place on taking regional actions to enhance that institution/asset as a means of improving economic development in your region.

Infrastructure <i>(circle one for each item)</i>	Quality of institution/asset					Factors for regional action				
	Significant Strength		Significant Weakness			Priority for action			High	Low
Highways	5	4	3	2	1	5	4	3	2	1
Commuter railroads	5	4	3	2	1	5	4	3	2	1
Freight railroads	5	4	3	2	1	5	4	3	2	1
Airports	5	4	3	2	1	5	4	3	2	1
Docks, wharfs, water terminals	5	4	3	2	1	5	4	3	2	1
Multi-modal freight facilities	5	4	3	2	1	5	4	3	2	1
Water infrastructure	5	4	3	2	1	5	4	3	2	1
Electric utilities	5	4	3	2	1	5	4	3	2	1
Natural gas utilities	5	4	3	2	1	5	4	3	2	1
Telecommunications	5	4	3	2	1	5	4	3	2	1
Industrial/research parks	5	4	3	2	1	5	4	3	2	1
Solid waste removal	5	4	3	2	1	5	4	3	2	1
Sanitary sewers	5	4	3	2	1	5	4	3	2	1
Stormwater sewers	5	4	3	2	1	5	4	3	2	1
Public safety	5	4	3	2	1	5	4	3	2	1
Other _____										

Business Climate <i>(circle one for each item)</i>	Quality of institution/asset					Factors for regional action				
	Significant Strength		Significant Weakness			Priority for action			High	Low
Real property tax rates	5	4	3	2	1	5	4	3	2	1
Sales tax rates	5	4	3	2	1	5	4	3	2	1
Personal income tax rates	5	4	3	2	1	5	4	3	2	1
Corporate income tax rates	5	4	3	2	1	5	4	3	2	1
Enterprise zones	5	4	3	2	1	5	4	3	2	1
Property tax abatements	5	4	3	2	1	5	4	3	2	1
Sales tax rebates	5	4	3	2	1	5	4	3	2	1
Unionization	5	4	3	2	1	5	4	3	2	1
Tort liability laws	5	4	3	2	1	5	4	3	2	1
Product liability laws	5	4	3	2	1	5	4	3	2	1
Environmental permitting process	5	4	3	2	1	5	4	3	2	1
Environmental liability laws	5	4	3	2	1	5	4	3	2	1
Unemployment compensation laws	5	4	3	2	1	5	4	3	2	1
Worker compensation laws	5	4	3	2	1	5	4	3	2	1
Passenger air service	5	4	3	2	1	5	4	3	2	1
Freight air service	5	4	3	2	1	5	4	3	2	1
Other _____										

Community “Strengths and Weaknesses” Survey Example

Workforce Development <i>(circle one for each item)</i>	Quality of institution/asset					Factors for regional action				
	Significant Strength					Significant Weakness				
	5	4	3	2	1	High	4	3	2	Low
School-to-work programs	5	4	3	2	1	5	4	3	2	1
Apprenticeship programs	5	4	3	2	1	5	4	3	2	1
Tech prep programs	5	4	3	2	1	5	4	3	2	1
K-12 education	5	4	3	2	1	5	4	3	2	1
Community colleges	5	4	3	2	1	5	4	3	2	1
Universities	5	4	3	2	1	5	4	3	2	1
English as a second language	5	4	3	2	1	5	4	3	2	1
Basic skills training programs	5	4	3	2	1	5	4	3	2	1
Customized skill training programs	5	4	3	2	1	5	4	3	2	1
Technology skill training programs	5	4	3	2	1	5	4	3	2	1
Telecommuting opportunities	5	4	3	2	1	5	4	3	2	1
Other _____										

Business Development <i>(circle one for each item)</i>	Quality of institution/asset					Factors for regional action				
	Significant Strength					Significant Weakness				
	5	4	3	2	1	High	4	3	2	Low
One stop business centers	5	4	3	2	1	5	4	3	2	1
Small business development centers	5	4	3	2	1	5	4	3	2	1
Technology commercialization centers	5	4	3	2	1	5	4	3	2	1
Minority/female business services	5	4	3	2	1	5	4	3	2	1
International trade offices	5	4	3	2	1	5	4	3	2	1
International trade zones	5	4	3	2	1	5	4	3	2	1
Business incubators	5	4	3	2	1	5	4	3	2	1
Venture capital programs and funds	5	4	3	2	1	5	4	3	2	1
Technology venture promotion	5	4	3	2	1	5	4	3	2	1
Manufacturing modernization	5	4	3	2	1	5	4	3	2	1
Manufacturing extension centers	5	4	3	2	1	5	4	3	2	1
Regional place marketing and promotion	5	4	3	2	1	5	4	3	2	1
Basic research and development	5	4	3	2	1	5	4	3	2	1
Entrepreneurial assistance	5	4	3	2	1	5	4	3	2	1
Other _____										

Community “Strengths and Weaknesses” Survey Example

Community Development <i>(circle one for each item)</i>	Quality of institution/asset					Factors for regional action				
	Significant Strength			Significant Weakness		Priority for action			High	Low
Cultural amenities	5	4	3	2	1	5	4	3	2	1
Recreational facilities	5	4	3	2	1	5	4	3	2	1
Affordable housing	5	4	3	2	1	5	4	3	2	1
First time homebuyers assistance	5	4	3	2	1	5	4	3	2	1
Volunteerism	5	4	3	2	1	5	4	3	2	1
Social Services	5	4	3	2	1	5	4	3	2	1
Family self sufficiency	5	4	3	2	1	5	4	3	2	1
Community development organizations	5	4	3	2	1	5	4	3	2	1
Organizational training	5	4	3	2	1	5	4	3	2	1
Leadership training	5	4	3	2	1	5	4	3	2	1
Community development block grants	5	4	3	2	1	5	4	3	2	1
Tax increment financing	5	4	3	2	1	5	4	3	2	1
Police and fire protection	5	4	3	2	1	5	4	3	2	1
Recreational opportunities	5	4	3	2	1	5	4	3	2	1
Recycling/resource recovery	5	4	3	2	1	5	4	3	2	1
Energy conservation	5	4	3	2	1	5	4	3	2	1
Historic preservation	5	4	3	2	1	5	4	3	2	1
Smart or sensible growth	5	4	3	2	1	5	4	3	2	1
Home weatherization	5	4	3	2	1	5	4	3	2	1
Support for working families	5	4	3	2	1	5	4	3	2	1
Other _____										

Using the lists above as a guide for classification, please prioritize the following areas in terms of the level of attention your region should give them over the next five years. Please designate the area that should receive the most attention with a “1” and proceed to rank the areas down to a “5” for the lowest priority in terms of attention.

- _____ Infrastructure
- _____ Business Climate
- _____ Workforce Development
- _____ Business Development
- _____ Community Development and Betterment

Which of the following industry sectors do you consider the most important for the continued economic vitality of your region? *(check only one)*

- | | |
|--|------------------------------------|
| _____ Mining and natural resources | _____ Agriculture |
| _____ Manufacturing including tech based companies | _____ Retail business |
| _____ Transportation services | _____ Consumer services |
| _____ Business services including tech based companies | _____ Government/public facilities |

WORKSHEET 3 – *Developing the Plan “Focus”*

3. What are two threats to economic development faced by your region?

4. What are the two specific actions that could be taken in order to most positively affect economic development in your region?

B. Determine potential futures

Identify potential short- and long-term changes that may occur in the community. Use current statistics and forecasts of population and other data that will allow for best estimates of the chances to affect the future of the community.

1. Based on current population information, what do we think the next 10 years will be like in terms of our residents? Have there been a large number of births in the community? Is our school-age population growing? What percentage of our residents is elderly? How many are middle-aged, and in the next 10 years will be moving into the elderly category?

2. What do we know about our current employment situation? What kinds of jobs do we anticipate having here in 10 years? How many jobs?

WORKSHEET 3 – *Developing the Plan “Focus”*

C. Using the results of the environmental scan from the previous section, evaluate whether current state of affairs is “positive” or “negative” for the community. Decisions regarding the status of the situation should be made in the context of the community Vision.

1. Determine SWOT (Internal strengths and weaknesses, opportunities and external threats).

Our strengths in terms of our community Vision are: *List the things that will help us to achieve our Vision.*

Our weaknesses are: *List the things that will hinder us in achieving our Vision.*

2. What are some things happening in the region/world that could affect our community? Do we have any control over these things and how they affect our community?
3. Are there developments in the larger economy that could be a benefit to our community? Are there different types of jobs being developed that would enhance our current employment situation? Are there things that we have that the larger region/world needs?

WORKSHEET 3 – *Developing the Plan “Focus”*

D. Determine priority issues to be the focus for development of goals and objectives.

1. From the strengths and weaknesses, determine which issues are the most crucial in relation to achieving the community Vision.
2. Group issues into like categories to develop priority areas. After grouping the individual issues, determine larger categories, such as: housing, education, employment, etc.
3. Use priority areas to develop overall goals that will move the community closer toward its vision for the future. for example, a goal may be: “To ensure adequate housing for the employees to serve our local industries and businesses, the community will determine what types of housing are available in the community.”
4. After developing broad goals, develop specific objectives to meet the goals. Keep in mind the need to be able to obtain these objectives within the confines of the available resources – both monetary and non-monetary. For example, to meet the previously stated goal, an objective may be: “Conduct a housing assessment to determine types of housing, housing costs, vacancy rates, and other issues for residents of the community.”

WORKSHEET 4 – *From Strategy to Action*

A. Formulate a work plan for each objective. Details need to be included which will ensure the completion of the objective with the community Vision as the guide.

After goals and objectives are clearly defined, the committee will need to formulate specific programs for action to meet the objectives, as well as establish the organizational structure necessary to implement the programs. For example, to meet the previously stated objective “Conduct a housing assessment to determine types of housing, housing costs, vacancy rates, and other issues for residents of the community” the following items would need to be identified.

1. Responsible agency – who will do the work?
2. Date of completion – when will it start, and how long will it take? Does it need to be done by a certain date to assist in accomplishing one of the other objectives?
3. Cost – will there be costs involved, such as equipment, supplies, or materials? What will be the staff costs? Who is responsible for paying for these costs? Is the responsible agency willing to undertake this effort based on the costs involved?
4. What is the anticipated outcome? Will there be a product as an end result? Describe the outcome in detail as a benchmark to measure results.

Need help developing your community's strategic plan?

Contact the regional council nearest you!

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Guidebook Feedback Form

We are utilizing *Developing a Community Strategic Plan* in the following community:

Contact Person: _____

Title: _____

Address: _____

Phone: _____

E-mail: _____

How long has the Steering Committee been formed?

- Less than a year
- 1 to 5 years
- More than 5 years

Date started: _____

Has this group been involved with other community planning projects?

- Yes
- No

Who was involved in the planning process? List individual's names and organizations.

Has the guidebook helped the committee take action in the strategic planning process?

- Yes
- No (please explain)

Briefly describe the actions that have taken place with the support of this guidebook.

What new ideas did the Steering Committee gain from working with this guidebook?

What changes have occurred in your community as a result of using this guidebook?

Additional comments:



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