



# Staying the Course

## Companion Workbook to the Staying the Course Webinar

Presented May 10, 2022 by Heather Stewart, AICP, Agnew::Beck Consulting for the 2022 Bristol Bay Native Association (BBNA) Economic Resilience Webinar Series



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## What's in a plan?

<b>Community</b>	the people, land and/or resources the plan is focused on. Who or what is the plan for?
<b>Community Profile</b>	includes information about the community, land and/or resources the plan is focused on. It includes qualitative, descriptive information as well as quantitative/measured information.
<b>Mission</b>	describes what we do and who we serve. Included in strategic plans for organizations.
<b>Vision</b>	describes the future the community wants to move toward with the plan.
<b>Values</b>	describe what is important to the community.
<b>Goals</b>	broad statements of how to get to the vision. They describe long term improvements or changes we want to achieve.
<b>Objectives</b>	Measurable changes we want to make over the planning window.
<b>Action Plan</b>	include projects, programs and policies that are intended to carry out goals.
<b>Projects</b>	have a clear beginning, middle, end. Completing them should get us closer to achieving one or more of our goals.
<b>Programs</b>	are an ongoing set of related activities intended to achieve our goals.
<b>Policies</b>	describe <i>how</i> we're going to do things, what we will <i>start</i> doing, <i>stop</i> doing or <i>do in a specific way</i> to achieve our goals.
<b>Implementation</b>	describes how the action plan will be carried out, highlighting key tools, resources, and partnerships.
<b>Evaluation</b>	includes specific measures that will be used to measure progress toward goals or desired outcomes.

**Test yourself:**

**Who is our 'community'? What are some examples of different ways to define 'community'?**

**Does everyone in a community have to agree on the same vision for its future?**

**Why are the values important to include?**

**Why does the 'background/contextual information' section include both qualitative and quantitative information?**

**How do you know if an idea is a goal or part of the Implementation/Action Plan?**

**What are some examples of projects, programs, and policies?**

## Plan Overview Worksheet

### **WHO WE ARE**

*Briefly, describe who we are (as an individual, community, organization).*

### **OUR VALUES**

*What is most important to us? Which values or ideas guide our decision-making?*

### **OUR VISION**

*Briefly, describe what we envision our desired future will be like.*

### **GOALS**

*Goals describe the broad changes to align with our vision. What do we want to accomplish in five years?*

## Plan Overview Worksheet Guidance

**WHO WE ARE** | Questions to ask about who we are:

1. What is the name of our group, community, or organization?
2. Where are we located? Describe our terrain or important features of our place in the world.
3. How many of us are there?
4. What is our heritage and where do we come from? When and how did our organization begin?
5. What are the pressing issues we are facing today and in the future?
6. What is most important to us – generally, or in the work that we do?

Community or economic development plans will also include a **Community Profile** that gives contextual information like:

7. How many people are working? Which jobs are available in our community?
8. What are the economic opportunities and challenges we see for our village?
9. Is our population growing or shrinking? Why?
10. Who lives here? What ethnic groups make up the majority and minority? What percentage of our people are Elders, young children, youth and adults? Are these groups growing or shrinking in number?
11. Which community facilities do we currently have?
12. Who owns the land in and around our village?
13. Describe our schools and educational resources? Is our student population growing or shrinking?
14. Which forms of transportation do we use?
15. What is the cost of living here?

**OUR VISION** | Questions to ask about our vision:

1. What do you like about living here? What do you want to protect and continue in future?
2. What would you imagine life to be like for your great-great-great grandchildren? Describe what you see, the soil conditions, the plants, the animals, the air, the weather, and the water.
3. If you are planning for an organization, what is the ideal future like for the people helped by the work the organization does?

**GOALS** | Goals describe bigger-picture accomplishments you want to achieve over the next three to five years. Goals can also be worded as “outcomes.” Looking at the parts of the worksheet you already filled out:

1. Does it include issues the community could address? If so, these could be goals.
2. What could be done to move community life closer to this vision? These could also be goals.
3. In what ways could things be done differently in your community to live these values more fully?

Once you have identified your goals, you can start to think about the steps it will take to accomplish each goal. Do this by developing a one-year action plan that will move you closer to your five-year goals. The action plan will provide direction to you and your program staff and should be updated annually.

## Action Plan Worksheet

### GOAL

*What do we want to accomplish in five years?*

### ACTION ITEM(S)

*Which concrete task(s) or action(s) will get us closer to the goal?*

### WHEN

*When will each action happen? Is there a deadline?*

### WHO

*Who is responsible for carrying out each action? Are partnerships needed?*

### COST

*How much will it cost to carry out each action?*

**1.**

**2.**

**3.**

**4.**

**5.**

### RESOURCES

*Which resources will help us complete each action item? E.g., funding, staff, training, equipment, supplies, partners, information, etc.*

### COMMENTS

*Is there anything else to note?*

### MEASURES OF PROGRESS

*How are we doing?  
How will we know if we are succeeding?*

## Action Plan Worksheet Guidance

**RESOURCES** | Questions to ask about resources needed to carry out your plan, generally:

- What resources will you need to get your program started?
- What resources will you need to sustain your project over the years?
- Which of these resources do you currently have in your community? Which do you need?

Questions to ask about different types of resources:

- **Staff:** Do you have staff or potential staff members identified in the community? Do you need to bring someone in from outside the community on a temporary or permanent basis? Can someone in the community take some training to be able to staff the program or action item?
- **Training:** What kind of training do you need? Is it available locally or through distance education? Do you need to send someone out of the community? Can you get funding to help pay for the costs of this training?
- **Equipment:** What kind of equipment do you need? Do you have it locally? Can you make it? Does it need to be ordered and shipped into the community? Is it something that can be shared with nearby communities? Are there grants to help pay for it?
- **Supplies:** What kind of supplies do you need? Are they available locally or do they need to be special ordered? Is there funding to help pay for them?
- **Funding:** What do you need funding for? Do you have a budget, with specific items and researched costs? Which funding sources are aligned with your needs?
- **Informational resources:** can include technical assistance, reports from other communities engaged in similar projects, data from online or locally collected sources, traditional knowledge, and input from specific people who will be involved or affected by the project/program.

If you are working with partners (identified under “WHO” or “RESOURCES”), identify and contact potential partners before securing outside funding. You can increase your chances of success by working with partners and supporters of your plans to strengthen funding proposals.

1. Work with your neighbors to find common goals. Know your own community/organizational goals and share them with potential local, regional, and state partners.
  - What level of community or partner support are you looking for?
  - Before reaching out to partners, can you do anything to build more financial sustainability into your plan?
  - Start with potential local partners first. Moving beyond local options, which partnerships will make the most sense?
2. Set up a time to talk with potential partners about working together to achieve your goals.
3. Discuss your goals with potential partners.
  - Do you share common goals?
  - Can you share or exchange resources? What are those resources?
  - Will your project(s) still require outside funding?
  - How will you work together to secure that funding?
4. Identify specific ways to work together to accomplish common goals.

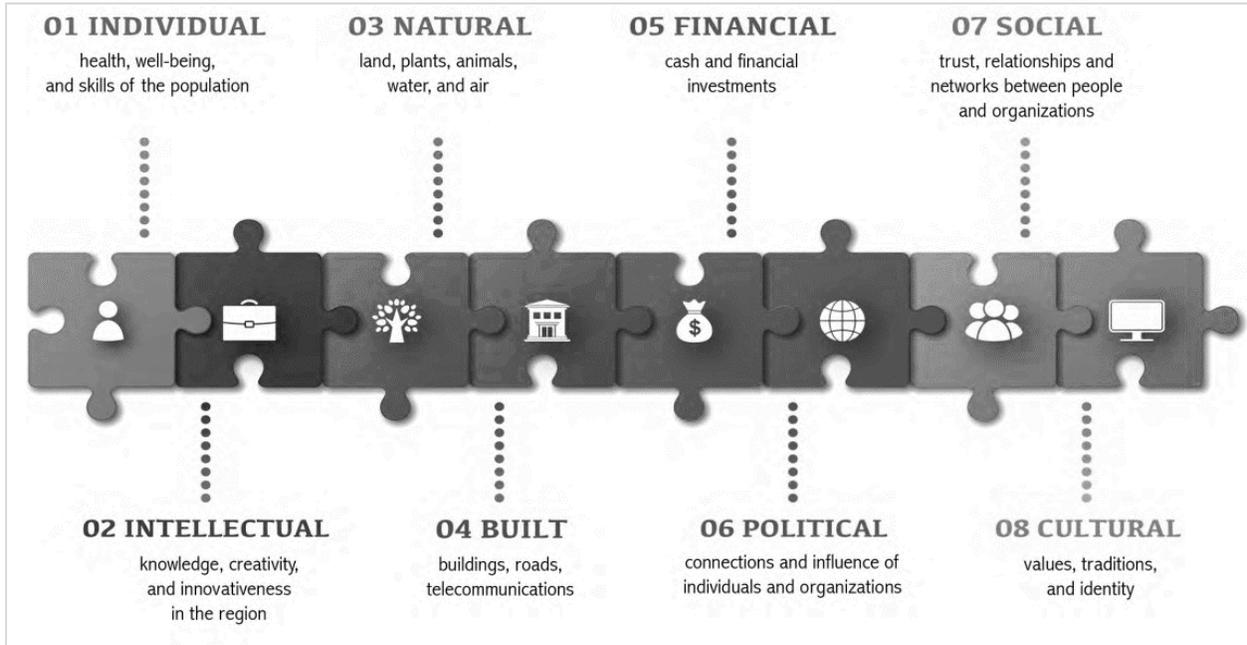
## Types of Plans

<b>Action Plans</b>	include projects, programs and policies that are intended to carry out goals.
<b>Area-Specific Plans</b>	<p>provide direction for a geographic area, usually based on a shared feature (e.g., watershed, transportation system, trade network).</p> <ul style="list-style-type: none"> <li>• Area-specific plans may include regional and subregional plans.</li> <li>• <u>Term</u>: usually, medium- to long-term, or 5-20 years.</li> </ul>
<b>Comprehensive Plans</b>	<p>bring the whole community together to develop a community vision based on shared values.</p> <ul style="list-style-type: none"> <li>• Cities use comprehensive plans to guide physical growth and community development to meet social, economic, and environmental goals.</li> <li>• Comprehensive plans address specific elements, such as land use, housing, environment, community wellness, culture, education, public facilities, transportation, economy, leadership.</li> <li>• Title 29 of the Alaska Statutes requires municipalities to have comprehensive plans that include: (1) statements of policies, goals, and standards; (2) a land use plan; (3) a community facilities plan; (4) a transportation plan; and (5) recommendations for implementation of the comprehensive plan. (AS 29.40.030(b)).</li> <li>• Comprehensive plans include an implementation plan and establish measures of success for future evaluation.</li> <li>• <u>Term</u>: long-term, 10-20 years.</li> </ul>
<b>Facility Operations Business Plans</b>	model the sustainable operations of a facility that is newly constructed, newly acquired, expanded and/or remodeled.
<b>Functional Plans</b>	<p>provide direction for community services, such as:</p> <ul style="list-style-type: none"> <li>• Utility studies</li> <li>• Housing plans or studies</li> <li>• Transportation plans or studies</li> <li>• Human services plans or studies</li> <li>• Environmental plans</li> <li>• Economic development plans</li> <li>• <u>Term</u>: usually, medium- to long-term, or 5-20 years.</li> </ul>
<b>Organizational Business Plans</b>	describe an organization's operations, highlighting the sustainability of the entire organization.

## Types of Plans (*continued*)

<b>Policy Plans</b>	give broad, long-term policy direction. <ul style="list-style-type: none"><li>• Strategic plans that focus on specific plan elements can be developed to allow your organization to make the most of opportunities as they come.</li><li>• Policy plans may include Comprehensive Plans.</li><li>• <u>Term</u>: long-term, 10-20 years.</li></ul>
<b>Program Business Plans</b>	describe a new or expanded program within an organization and demonstrates its sustainability.
<b>Project-Specific Plans</b>	describe the design for a project or program and demonstrate that it is operationally and financially sustainable. <ul style="list-style-type: none"><li>• These plans can include business plans, which are derived from the goals set in a strategic plan.</li><li>• <u>Term</u>: depends on the length of the project, program, or facility operations.</li></ul>
<b>Regional and Subregional Plans</b>	cover geographic areas that include more than a single community or governmental entity (more than one town, city, or state). <ul style="list-style-type: none"><li>• Special agreements among member communities are often necessary for the plan to be implemented.</li><li>• <u>Term</u>: usually, medium- to long-term, or 5-20 years.</li></ul>
<b>Strategic Plans</b>	set specific direction and provide a short-term action plan for community goals. <ul style="list-style-type: none"><li>• Strategic guidance helps you/your organization make the most of opportunities as they come.</li><li>• Annual action plans with regular reviews can help you/your organization move one specific initiative forward each year.</li><li>• Small, frequent, and consistent steps toward your goals are most sustainable.</li><li>• <u>Term</u>: 3-5 years.</li></ul>

**Test yourself:**



**Looking at the 8 types of wealth, how can planning increase wealth?**

**Which types of plans have or could increase wealth in *your* home community? How?**

**What are some other examples of different types of plans? How do they support different aspects of wealth generation?**

## Benefits of the Planning Process

### An effective planning *process* helps us:

- **Get clear on the community issues, vision and goals that should be driving our projects or programs.** Complicated administrative issues can arise from projects or programs driven by funding opportunities instead of real community needs. When funding dollars don't match community priorities and capacity, funds are mismanaged, and the organization is in a difficult position with funders. Clear direction comes *before* funding.
- **Get clear on our priorities and what we *can* commit to.** Strategic plans, prioritization exercises, and feasibility or business planning helps clarify:
  - **Sequence:** what to do now, what to do next, what to do later, *and*
  - **Capacity:** what we *can* do now with the staff, funding, and other resources we currently have. We can always build from where we are.
- **Get creative with actions, funding and other resources** by brainstorming with other members of our group, community and/or partners.
- **Build consensus** among our group, community, region, etc. Through planning discussions, we gain a shared understanding of what we aim to do and why, discuss differences of opinion and how to proceed.
- **Cultivate more effective leadership and staff support.** A planning process brings participating leaders into a fresh awareness of community needs/priorities and provides a renewed sense of direction for participating staff members.
- **Build trust and teamwork among our fellow community members.** Working together and talking with each other, we spend the time and show our dedication to each other. With participants from different parts of a community/organization, we can look and work beyond silos.

### Add your own thoughts:

## Get People Involved Worksheet

<b>Brainstorm</b>	Develop a list of questions and who can help.
<b>Community forum</b>	Use guest experts and host a forum. Discuss specific issues and hot topics the peak community interest. Have a “hook” to draw people in.
<b>Classroom presentation</b>	Offer a presentation on several different topics in schools. Youth get involved and they teach adults. You may even want to talk to the school principal and teachers about incorporating some of what you’re doing into the curriculum.
<b>Open door policy</b>	Make sure people can ask questions. Develop trust with your community.
<b>Planning Committee</b>	Develop a planning committee that includes representation of key stakeholders in the planning process.
<b>Surveys</b>	Conduct surveys with targeted groups.
<b>Interview</b>	Go door-to-door or conduct informal interviews or focus groups with elders and others who are interested.
<b>Workshops</b>	Host a traditional community workshop.
<b>Feelers</b>	Be engaged. Ask questions and keep your finger on the pulse of community. Join forces with existing groups and gatherings Try not to duplicate processes. Instead, work together.
<b>Focus groups</b>	Invite a small group of people that have the same interest or knowledge of a specific issue. Get their feedback on environmental issues facing your community. For example, if your community issue is an impaired water body, invite a small group of community members that are familiar with that issue. Get their feedback on why the problem exists and ideas for potential solutions.
<b>Other Ideas</b>	<i>Get creative! Are there other ideas that could work in your community or for your group/organization?</i>

## Benefits of the Planning Document

### Within our community, the planning *document* helps us:

- **Remember our values, priorities, and commitments.** The document helps sustain guidance when there is turnover in an organization or community members, leadership and/or staff.
- **Increase our accountability.** By following the spirit of the plan, we show that we are doing what we said we would do. If we need to make changes, the plan can help us develop a clear and supported rationale for *not* doing what we originally said we would do and an alternate path forward.
- **Be more intentional.** We can choose to direct our actions and lifestyles to align with our values, instead of reacting to things happening around us.
- **Increase our resilience.** Being more intentional helps us adapt to change and provides for future generations.

### Outside our community, the planning *document* helps us:

- **Collaborate and communicate** with partner organizations, funders, and others to coordinate our resources and activities to achieve shared or complimentary goals.
- **Secure funding and other resources.**
  - The plan contains information about our community, organization, and community-supported vision, goals and actions that can be easily cut and pasted into funding applications.
  - Documentation of community input into the plan tells funders that the projects, programs and policies in the plan have community (and sometimes partner) support.
  - Project/program plans, feasibility studies and business plans show funders and partners that our projects and programs are ‘shovel ready,’ that we have a clear sense of what we will do when our resource gaps are filled.

### Add your own thoughts:

## Planning Templates and Resources

*BBNA and other regional partners are ready to support your community!*

### **BBNA Grant Writing Workshop Day 1.4 “From Plan to Project” video**

<https://bbna.com/grant-writing-workshop-2022/>

### **BBNA Program Development**

<https://bbna.com/program-development/>

### **BBNA Transportation and Infrastructure Development**

<https://bbna.com/our-programs/transportation-and-infrastructure-development/>

### **Bristol Bay Vision Statement**

<https://bbna.com/bristol-bay-regional-vision/>

**Bristol Bay CEDS** can support individual community projects if they support larger regional goals:

<https://bbna.com/bristol-bay-comprehensive-economic-development-strategy-2022-2026/>

### **CEDS Central**

<https://www.cedscentral.com/>

### **Tanana Chiefs Council Community Planning Manual**

<https://www.tananachiefs.org/wp-content/uploads/2020/04/2019-Community-Planning-Resource-Manual.pdf>

### **Tanana Chiefs Council Community Planning Template**

(scroll to bottom under “Community Planning”)

<https://www.tananachiefs.org/services/village-planning-grant-writing/>

### **National Association of Development Organizations (NADO)**

<https://www.nado.org/>

**Yup’ik Values poster** (scroll to bottom under “Posters”)

<http://ankn.uaf.edu/publications/>

**Add your own resources:**