# CREATING A PRACTICAL AREA-WIDE DEVELOPMENT STRATEGY

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The planning process described in this document resulted from lessons learned in implementing the Five Year State and Regional Planning Project for the Illinois Department of Commerce and Economic Opportunity. The document was developed by the Center for Governmental Studies at Northern Illinois University.

INTRODUCTION

Planning, strategic planning included, is about setting the direction for some system -- entire communities, organization, business units -- and then working to ensure the system follows that direction. The plan is a set of decisions about what to do, why to do it, and how to do it. Planning is driven by a need to:

- Define the purpose of the area/organization i.e. set goals/objectives consistent with mission;
- Bring together reasoned, informed opinion about when change is needed and what change is needed;
- Build consensus and a sense of ownership about where an organization is going; and
- Effectively direct work to one end and focus efforts and resources on key priorities.

Strategic planning is a complex undertaking. The sponsoring organizations role is to guiding the planning process so that it uncovers the consensus opinions about area-wide goals, area-wide objectives and development strategies that can be implemented by the region’s organizations.

The complexity of the process requires professionals who guide both the planning and the implementation of the plan. Depending on the resources available, many organizations hire private consultants (or engage university centers) to employ planning methods, protocols, techniques, and procedures, and worksheets, and to assist in preparing forms, reports and other written documentation.

The six-phase strategic planning process outlined is designed exclusively for the unique requirements of a multi-community collaboration. The process assumes that no comprehensive area-wide planning study has been undertaken. Because the focus of this process is area-wide in nature, serving first to create a series of institutional goals and objectives to drive organizational work, it does differ from typical organizational planning in several respects. To help compare and contrast the differences, a well-known ten step strategic planning process for non-profits is used for comparison. The ten-step process is outlined in Creating and Implementing Your Strategic Plan, written by John M. Bryson and Farnum K. Alston, published by Jossey-Bass, Inc. 1996
PHASE I: THE PLAN TO PLAN; SET OUT THE BASIC SCOPE

For the sponsor of the community or area-wide strategic plan, the challenge is to encourage area stakeholder coalitions to take ownership of the planning process, strategy setting, and implementation. The planning sponsor’s role is to uncover those strategies important enough for community stakeholders to act upon because it is the community, acting through its leaders, that will decide what kinds of community improvements will occur. The Plan-to-Plan is the first phase of this process.

Agree on a Process: Initial agreement is needed “on the strategic planning process, the schedule and the key planning tasks. One of their first important tasks is to identify key decision makers. The next is to determine which persons, groups, units or organizations should be involved in the effort.” Step 1: Bryson and Alston. p7

Establish Planning Principles

Even if brief, the plan-to-plan should list the general philosophies or principles used to guide the planning. For example one important principle is to “encourage a collaborative process where regional leadership addresses regional issues with regional solutions.” Another example is to “use best practices in the planning process and documents.” The idea is to have higher order principles to serve as an ethical compass throughout the process.

Define Stakeholders

The most significant part of the plan-to-plan process is to identify the stakeholders for the strategic planning effort. One tool to identifying the stakeholder is to prepare a mission statement. A mission statement clearly defines who the customers (stakeholders) are; what their expectations are (interests or results); and how they will respond to those expectations (products). Stakeholders should include local elected officials, community-based organizations, local and regional development organizations and business associations. Interests could include the development-related themes such as a world-class community, equitable distribution of economic benefits for all segments of society, growth resulting in a prosperous economy, and development of sustainable marketplace institutions.

Identify and Understand Stakeholders: “The key to success for public and nonprofit organizations is… to address the needs of crucial stakeholders – according to those stakeholders’ criteria.” Step 3, Bryson and Alston, p 10.

Recognize Coordination Responsibilities

Planning cannot be done in isolation, because no region, organization, nor plan operates in a vacuum. The plan-to-plan should define roles other organizations play in the process. In most cases, engaging regional organizations such as workforce boards and councils of government whose programs and activities significantly affect economic activity would be appropriate. In other instances, state agencies, boards and commissions would be appropriate. These service delivery providers and other organizations are significant because their support is fundamental to successful implementation of the planning process.

Map the Regions

If the geographic area is very large, or if the region is diverse in its social, demographic, or economic make-up, consider whether smaller areas are more appropriate for conducting the facilitated group decision-making that is required for strategic planning. Component areas can be identified after a social,
demographic, economic, or topographic analysis (as appropriate). The idea is to group jurisdictions by similarity such as shared traits, close proximity or other common, distinguishing characteristics.

**Design & Detail Community Engagement**

To stay on schedule, the Plan-to-Plan should have a task chart for each major phase for the planning process, listing the phase and task; the staff, team or organization responsible for completion of that task; and the timeframe for completion. If the plan process were scheduled over several years, the major phases would be listed. For a shorter timeframe for example 12-15 months to completion, the task, responsible party, and time, for each step – steps like defining the scope, completing questionnaires, holding summit sessions, setting priorities, brainstorming solutions, and establishing implementation projects – would be listed.

**Confirm Resources for Implementation**

Without implementation resources and a commitment to continuous improvement, a plan is just a document. The community and its organizations must take ownership and responsibility of the initial planning process and for follow-up with implementation. Implementation resources will vary – Phase V goes into greater detail – but can include discretionary funds, resources allocated by planning partners or other sources.

**Prepare a Communications Approach**

To establish a consensus, extensive community engagement must be built into each step of the planning process. Communication is a key part of that engagement. Communications elements can include promotions, direct mail of reports like the Plan-to-Plan, and/or regularly scheduled forums.

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**Plan to Plan.** Where resources and time permit, the planning team should prepare a plan to plan. This document lays out the methodology for completion of each of the major steps, for example it:

- Defines local commitment to the strategic management process,
- Sets the planning horizon,
- Lists the people who will contribute to each step of the process,
- Outlines the major steps, or tasks, in the strategic planning process,
- Sets the sequence and timetable of events,
- Identifies strategic planning barriers, and ways to overcome them,
- Identifies factors that will facilitate strategic planning, and then capitalize on them.
PHASE II: DESCRIBE & DIAGNOSE THE SITUATION: POSITIVE ANALYSIS

The second phase of an area-wide strategic planning effort is directed to developing an understanding of the context and environment in which the planning will occur. This step is essentially fact-finding in nature, and consists of collecting data, reports and information related to the scope of the planning effort.

Assess the Environment: “In this step, the strengths and weaknesses… are catalogued and their strategic implications noted. In addition, the opportunities and threats… are explored and again, strategic implications are recognized.” Step 4, Bryson and Alston, p11.

The Situation Analysis

As part of the second phase, the ‘strategic’ plans of organizations operating or delivering services in the area should be collected and reviewed. Additionally plans that are comprehensive or region-wide in nature, for example from equivalent or peer organizations in other geographic areas, should also be collected and reviewed. Some of the plans that are typically analyzed include:

- Environmental plans
- Capital improvement plans
- Development agenda
- Councils of government
- Transportation plans
- Comprehensive housing plans
- Education/workforce plan
- Health care

The planning team will review these plans for several reasons: to identify community economic improvements already underway; to determine satisfaction with those efforts; and to locate suggestions for new community economic issues that need resolution. If time and resources are available, these plans can be condensed or summarized and used as background material for the summit meetings (held in Phase III). If summarizing is not possible, copies of the plans should be made available for group summits.

Survey Questionnaire of Strengths, Weakness, Opportunities and Challenges

To assure the broad participation in the process, the planning team should employ a questionnaire to investigate opinions about the characteristics or the improvements that are likely to have a positive influence on the quality of life of the area. Most questionnaires will undergo a pilot study and once tested, would be distributed for completion. Formal questionnaires can use scaled or open-ended questions to address the subjects of importance to the stakeholders, who were identified in the Phase I. Because communities are not the same as organizations, the area-wide questionnaire does not follow the typical SWOT – strengths, weakness, opportunities and threats – format; rather it is organized around:

Community Assets. A discussion of the competitive advantages of the area. This portion of the questionnaire addresses any item normally considered an asset: culture, institutions, the workforce, infrastructure, and other relevant public or private assets. This competitive advantages discussion is the community equivalent to an organization’s internal analysis of strengths and weaknesses.

Program Challenges. A discussion of the constraints faced by residents, business or the community as a region. This ‘constraints/concerns’ discussion – the community equivalent to the organization level external analysis of opportunities and threats – should address programs and services. Programs and services include efforts intended to change the costs, risks, information, accessibility, quality, etc. of the environment, the business climate, community quality, etc.
**Area-Wide Expectations.** A discussion of the stakeholders’ perception about how to measure success. Support for implementation is more likely if strategies address the concepts of success put forward by stakeholders and elected officials, community-based organizations, business groups and so on. The questionnaire should find out the stakeholders’ concepts of success.

**Results Analysis**

Results from the survey need to be analyzed and a summary should be prepared; generally as a series of tables with accompanying narrative. While survey results are descriptive by nature, *it indicates perceptions* of community assets and program challenges. These perceptions are tested in the remaining planning phases.

**Environmental Scan**

The next step is an environmental scan that has the primary purpose of modeling the general scope of the planning effort. While traditional ‘scans’ consist of statistical tables and graphs, *the community scan is intended to depict characteristics of the region as a systems model*. This ‘world view’ approach provides descriptive theories and models to help understand a region and its place in the larger context (the national or the world) and to guide the strategic decisions which will shape a region’s future. The environmental scan also serves to illustrate the major relationships between the key elements influencing the success of the community- that is, success as defined by questionnaire results. At least initially, the environmental scan materials will consist of a systems model, institutional trends, and the traditional socio-economic statistics:

*Systems Model.* The plan should have a brief, non-statistical model that identifies and describes the most significant institutions in the region. For economic development, one popular paradigm looks at the clusters of economic activity using concepts of competitive advantage; sometimes shortened to compare the ‘new information based’ economy with the ‘traditional’ economic systems.

*Institutional Trends.* The plan should note major trends expected to influence the region. One common paradigm for studying trends is called PEST, the political, economic, sociological and technical trends. An economics based one looks at trends or changes in the nature of supply, demand, production, and adjustments phenomena acting on and influencing the area economy.

*Socio-Economic Statistics.* The plan should provide an assessment of historical patterns, where appropriate, of social, demographic, environmental or economic activity for the region. In addition to traditional tables and graphs that could be presented, the statistics should report data that are directly related to the measures of success as collected from the survey.
PHASE III: ENVISION AN ALTERNATIVE FUTURE

Both the Phase I Plan-to-Plan and the Phase II Positive Analysis are ‘behind the scenes’ preparation for the third phase of the strategic planning process: the area-wide summit. This summit, sometimes called a town meeting, provides residents of an area the opportunity to set out a vision for the improvement of the area (community or multi-community region). Participants should include those organizations identified as stakeholders in Phase I: elected officials, community-based organizations, business and trade associations, educational institutions, local and regional development organizations, health care providers, and other organizations whose programs and activities might be affected by the economic climate. These summits have two purposes, first, to prepare a vision for the region 5-10 years out (externally focused, short and inspiring); and second, to settle on 5-7 priorities for achieving that vision.

Establish an Effective Vision: “The vision of success outlines what it [an organization, a region] should look like as it successfully implements its strategies and achieves its full potential.” Step 8, Bryson and Alston, p 12.

Morning Session of an Area-Wide Summit

Many planners will recommend using the SWOT analysis or the Environmental Scan as the basis for problem identification only because these are the conventional, traditional approaches. However community stakeholders don’t always have or agree about the same problems, but usually can agree about what a more ideal community would look like, so a ‘visioning’ step should come first.

Plenary Session; Context for the Visioning. The opening session of a summit should be used to create an atmosphere to allow participants to generate forward-thinking ideas. Alternatives include:

- Describe the new economy, economic advantages of a region and the impact of international competition on the area’s institutions and its resources, or
- Describe future scenarios assuming that worse case, no change and best case state of affairs are multiplied and/or accelerated in future.

Small Group Meetings; Build Consensus-Based Vision Statement. The remainder of the morning should consist of small group discussions and facilitated group decision making on a ‘vision.’ Since vision setting is not a typical kind of work activity, a facilitator is needed to guide the process.

Preparing the Vision Statement

Assuming that several small groups are used, the planning team will need to combine the respective visions from the respective discussion groups, to prepare one vision statement for the entire region.

Afternoon Session of a Regional Summit

The afternoon session of the summit meeting should follow a structured group decision-making process to derive consensus for regional development issues and regional development goals.

Plenary Session; Review the Survey Questionnaire Results. The afternoon session begins by securing consensus on – or rewriting of – the vision statement. It is followed by an overview of the region using the Environmental Scan from Phase II and a review of perceptions on strengths, weaknesses, opportunities and challenges from the Survey Questionnaire, also from Phase II.

Small Group Meeting; Identification of Key Issues. Building on the results of research and analysis, a second round of focus group meetings is needed to identify key strategic priorities that
address the vision. Strategic priorities are those fundamental challenges that affect a region’s vision and might include community assets or the foundations of development, the citizens, as a whole, as users or payers of services, or the financing or management of goods and services.

**Plenary Session; Consensus on Component Area Priorities.** The closing, plenary session is for setting priorities. The participants can determine the priorities using a group process such as voting dots. Later, in Phase V, a discussion must be undertaken to consider the methods, timing, cost benefit, funding, staffing, timing, support, and impacts from implementing the priorities.

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**Voting with Dots:** A voting technique that uses colored dots to identify the most important items from a list. Generally, between 3 and 5 dots are given to each member of the group, who are allowed to paste any or all dots on items considered a priority by the voter. Sometimes, the dots themselves serve as a form of prioritization; i.e. green is the highest priority, yellow is important; red is little or no priority.

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**Merging Group Expectations**

Assuming that several summits are held, at this stage there are differences in group interests and priorities that will need to be reconciled. These differences can be handled by generalizing to the broad, institutional goals and objectives that incorporate the distinct priorities. To get at the broader themes, the planning team will need to gather and synthesize the respective summit visions and priorities and prepare a common set of priorities for the area. Where the aggregate list of issues is too large and complex to easily grasp, the planning team should use content analysis or affinity diagramming to merge group expectations. Using the priorities from the respective summit as the starting point, the patterns of information that do arise represent a comprehensive Consensus Framework not only of the area’s priorities (which typically are rewritten as objectives) but also the higher order goals.

**Interim Report on Institutional Goals and Objectives**

To close out Phase III, the information and materials collected from Phase II and Phase III should be published in both paper and electronic media. The document should incorporate the economic assumptions and the socioeconomic statistics from Phase II and the regional visions, priorities and resulting framework from Phase III. It should also speak to the next steps of the process. The format and layout of the content of this kind of document will vary depending on uses, for example reports can emphasize the unique nature of the area or the elements in common among areas.

This interim report on institutional goals and institutional objectives is one of the major written products from the third Phase. Once the report is completed in draft or final form, the planning team should disseminate the report to build support for the consensus framework.
PHASE IV: SELECT STRATEGIES TO IMPLEMENT; NORMATIVE ANALYSIS

This fourth phase of the planning process is aimed at moving beyond the general framework of institutional goals and objectives (area-wide priorities) to identifying possible strategies to achieve the priorities. In most cases, practitioners in the community (directors of organizations, elected officials, managers of service programs, and so on) will prove to be invaluable sources to brainstorm about new, untried or model strategies and to set action plans that address area’s framework of development objectives.

Build Consensus for the Institutional Goal and Objectives

To the extent needed, the planning team should educate and inform stakeholders about the Phase III report – the consensus framework for community improvement (has the report been formally named this?) – to aid key stakeholders in understanding the challenges and opportunities ahead. This kind of relationship building should include:

Publication Distribution. Formal presentations materials (i.e. 2-4 page executive summaries, slide show/overhead presentations, etc.) should be developed to summarize the results of Phase III. Such materials should stress the process to date, an outline of the strategic goals and objectives, a listing of key results achieved, and related information. Publications can be mailed directly to key individuals and organizations, published on the Internet or any combination.

Stakeholder Briefings. Formal briefings sessions with stakeholders may be needed. Two to four hours should be scheduled for each meeting, directed to advancing the consensus framework for development. Area councils, neighborhood organizations, mayors and managers groups, commerce and growth associations, and other stakeholders will typically have an interest in the planning results.

Preliminary Solutions

The planning team should begin to generate ideas and strategies about how to achieve the area’s vision, goals and objectives. There are several methods that should be used.

Stakeholder Consultation. In addition to advancing the framework, stakeholder briefing sessions can be used to collect suggestions from key stakeholders about possible solutions and implementation ideas. Their feedback on possible programmatic, legislative and administrative actions can be used as a starting point for broader discussion in the planning and implementation process.

Regional Plan Review. A second means of generating project ideas is a thorough review and compilation of the strategies articulated in the plans of the area’s major organizations, for example:
- Community-based organizations, community action agencies, neighborhood development groups,
- Education and training agencies, workforce investment areas, community colleges, and so on.
- Economic development agencies, local chambers, business development centers, visitor bureaus.

Surveys. Another way to gather information about implementation strategies is with a survey. A typical survey is brief, it will ask about current improvement efforts being undertaken, satisfaction with those efforts and identify areas for further improvement.

Service Directory. Finally, information on various state or federal agency programs should be collected, with reference to how their programs could help achieve the area’s visions. These materials shall serve as the background material for the area-wide brainstorming summits.
Area- Wide Brainstorming Summit

Even if it is not possible (because of cost or time constraints) to hold key stakeholder meetings, conduct surveys or prepare a services directory, the planning team should hold brainstorming sessions with its stakeholders groups. While there will be resistance to “more meetings”, the sponsor’s commitment may prompt community participants to continue to assist. The brainstorming sessions should follow a structured process to derive consensus on important regional development solutions. At this summit, the planning team should record and track the recommendations. Ideas (projects and strategies) should be recorded on a Strategy Setting Worksheet.

The Opening Plenary Session. In the opening session of this second summit, the planning team should provide an orientation and refresher to remind the participants of the planning process itself; the groups’ priorities (on a topical or regional basis), the purpose of the brainstorming session; and the resources available (and stakeholders’ responsibility) to follow-up and implement strategies.

The Small Group Sessions. The second session is a small group discussion, arranged so that the planning team can draw on expertise of the audience (to suggest strategies to address the development objectives from Phase III.) Essentially each participant is allowed to brainstorm and suggest programmatic, administrative or legislative actions that would address the region’s development needs. Related items should be combined and reported out in the closing session.

The Prioritizing Plenary Session. The closing, plenary session group is for setting priorities. To the extent required, the sponsor should employ a priority setting tool (voting dots for example) to garner consensus from the participants regarding their preferences on projects that can and should be undertaken regionally, and efforts that should be undertaken by the various state agencies, to move the regional agenda forward.

Report Suggestions [Solutions/Strategies Report]

Summary Reports must be completed to a level of detail to allow it to be used for several purposes: detailed review and analysis of each suggestion; aggregation and combination of similar strategies; tracking for future implementation and so on. The structure and layout of the worksheets should include:

**Strategic Goals/Objective.** Every project or strategy should be organized (slotted) into the most appropriate consensus framework goal or objective, for example strengthen business vitality, expand market capability, improve community conditions or enhance public capacity.

**Priority Actions.** Priority actions should be identified first. These represent the area-wide consensus of programmatic, legislative or administrative actions to be taken to foster and promote development in the area, taking into account the resources and economic factors of the area.

Identify and Frame Strategic Issues: “the identification of strategic issues – the fundamental challenges affecting the organization’s mandates, its missions and values, its product or service level and mix, its costs, its financing its organization and its management.” Step5, Bryson and Alston, p11.
PHASE V: PREPARE/IMPLEMENT WORK PLANS; INSTRUMENTAL ANALYSIS

The brainstorming session provides a forum for gathering ideas from businesses, educational agencies, community-based organization, government, chambers of commerce, and development organizations. The result – ideas and suggestions to address the development needs of the region – is the basis for Phase V. This phase of the planning process requires evaluating strategies and preparing work-plans accordingly. The steps in Phase V will critically assess these suggestions, to determine if champions exist to effectively implement them. The planning team undertakes the majority of this phase.

Formulate Strategies to Manage the Issues: “Strategies may be of several different types: grand strategy for the community; strategy for organizational subunits; program, service, product or process strategies; strategies for functions (resources management, finance, purchasing)” Step 6: Bryson and Alston, p11.

Decision-Making

Because the suggestions will differ in specificity, ranging from broad objectives to specific programmatic, legislative or administrative actions, the initial implementation step is to decide if the strategy is workable. To be considered a ‘strategy’ the recommended course of action must explicitly or implicitly describe the ways and means – the “what and how” – to achieve an objective. To be considered ‘workable’, the risk associated with the implementation of a suggestion must be determined. Risk assessment is a common step in all project selection and decision-making. Risk assessments typically look at three criteria: suitability, feasibility, and acceptability.

- **Suitability Test.** Establish if it is reasonable to act. A course of action may not be suitable to undertake if it is too broad or too complex to manage (complexity); if it is too long-range to be justified (time horizon), or if it is too large for a single partner organization to undertake (scale).

- **Feasibility Test.** Gauge an organization’s capability to act. This kind of review would consider the operational environment (whether there is organizational inertia, proprietary interests or customer resistance); operations requirements (if currently available technology exists); and resources required (if staffing, facilities, and operating costs are known and if overall costs are reasonable).

- **Acceptability Test.** Decide if there is a will to act. The will to act is based on capacity, organizational capacity equal to the level/standards required; costs, actual resources available, or expected, to support the effort; performance, the tools, talent and skills available and are expected to be successful; and timing, a beneficial effect of the course of action is achievable in 9-12 months.

The result of the risk analysis is a ‘short list’ of high priority project recommendations or strategies that take into account the resources and economic factors indigenous to the area. This short list of strategies would also be expected to provide significant impact given the constraints of cost, time, and technique.

Performance Planning

Even the best strategy will languish in the absence of an individual or organization that embraces the strategy and sees it to completion. While ultimately the region and its organizations must take responsibility for implementing its strategies, there are alternatives for implementation. Regional agencies are an appropriate sponsor for those actions that are unique to the region. State or federal agencies are possible sponsors for strategies providing benefits beyond the scope of a single region. What happens with regard to performance planning (often times called actions plans) is determined largely by the efforts of
the organizations participating in the summits (and those not able to attend) that maintain an organizational interest in community development. These action planning tasks include:

**Issue Assignment.** Regional organizations, including private, government, education, and non-profit agencies may be able to reallocate or adjust existing program efforts so that of the region’s service commitments coincide with the expressed needs of the regions;

**Policy Formulation.** This policy formulation step seeks partner consensus or agreement with regard to the objectives of the course of actions and the ways and means to achieving those objectives. This amounts to deciding what and how to implement a strategy.

**Action Planning.** For the recommendations reaching this stage, the action planning step (sometimes called operational planning) involves deciding the kinds of resources needed; specifying staff, facilities and equipment to be used; flow charting the development of the product or service to be delivered and deciding the kinds of support functions required to carry out the strategy to its fruition.

**Issue Management**

While implementation is necessarily dependant on the type of strategy or course of action being undertaken, there are several standard kinds of actions to be considered. The broad forms of action (roles and responsibilities) depend on the nature of the undertaking but could include:

**Capacity Building.** Capacity building or technical assistance work includes efforts resulting in improvements of current practices but also time-specific tasks focusing on a specific content issue, conducted by experienced consultants, often brought into the region for a specific activity.

**Service Benefactor.** Some of the recommended projects may require a sustained commitment of service delivery from one of more of the planning partners. Partners might also give financial support to third party intermediaries or quasi-public institutions, which then directly deliver the service.

**Advocacy to Shape Institutions.** Certain projects may require the planning team to leverage its network of relationships with external, state and federal agencies to garner support of the external agencies to allocate resources to accomplish regional strategies.

**Public Goods and Facilities.** When governmental agencies are one of the planning team members, they can use their ability to raise taxes and set laws to carry out the strategies.

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**Develop an Implementation Process – “In this step, adopted strategies are implemented throughout the relevant system.” Step 9, Bryson and Alston, p12.**

As projects are implemented, the planning team needs to continue its communications with area stakeholders. Such communications would report on progress in implementing the area’s priorities, mechanisms identified to ensure broad involvement of resourceful organizations within the region and financial assistance that has been secured to carry out stakeholders proposals.
PHASE VI: EVALUATIVE ANALYSIS

For a planning process that involves implementation, three kinds of evaluation (monitor progress, measure performance and analyze impact) can be undertaken to serve three different audiences (program managers, customers, the public at large).

Monitoring Progress

*Time and Effort.* Measures of the time and effort (tasks and activities) being undertaken for example quarterly or annual program reports.

*Customer Demographics.* Measures of which type of customer is being served most successfully (with a focus on other, new customers who could be brought into the process).

*Plan versus Actual Measures.* Measurement of timelines met and other accomplishments in relation to the original expectations and goals.

Measuring Performance

*Formative Analysis.* Evaluation to determine how to carry out operations better, for example: identify protocols and forms for ease of administration and so on

*Customer Satisfaction.* Satisfaction surveys to identify whether the products or services met the customer’s needs and whether new processes or methods needed.

*Project Deliverables.* Identification of the efficiency and effectiveness with which the products or services are produced.

Analyzing Program Impact

*Benchmarking.* Baseline information on the type and level of results in relation to practices of a representative sample of other process, for example the best practices.

*Impact and Results Analysis.* Results and impact from the planning process such as funds leveraged, new organizations created and so on.

*Summative Analysis.* Evaluation to determine if the ultimate public purpose(s) of an activity was achieved and whether it was done in a cost beneficial manner.

In an ideal circumstance, strategic planning is an ongoing cycle. The final phase of one planning cycle – judging what went well and what went wrong and rethinking what has been done – is the basis for revisions. Based on the information and ideas generated from evaluation, the planning team can set an improved planning cycle in motion.
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