Strategic Visioning for Community Development

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Strategic visioning is used by communities to identify future goals and work collectively to address community development needs. This guide provides an overview of the benefits of strategic visioning, situations appropriate to apply the techniques, and the steps to plan, implement and evaluate a visioning process.

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What is Strategic Visioning?

Strategic visioning is a process in which community members discuss past and present community issues, determine positive qualities and assets, identify future goals, design a plan for the community, carry out a series of actions, and evaluate the outcomes. A strategic visioning process provides a framework to identify community core values and assets, describe overall goals, and determine specific objectives and strategies that assist with community decision making. The process outlines what a community could be or should be like in the short and long-term future. Through collective dialogue and reflection, strategic visioning has the potential to lead to community action by creating a "road map" to the future.

What are the Benefits?

Visioning brings community members together to discuss past trends, evaluate present realities, and determine their common future. The process gives members of a community the opportunity to explore new ideas and encourages community members to lay out options, discover creative and innovative ideas, and focus on the positive aspects of the community. The purpose of strategic visioning is to:

- Encourage and engage diverse citizen participation
- Develop a shared community plan for the future
- Advance the capacity of community organizations and partnerships
- Expand the leadership base

- Strengthen individual skills
- Collectively identify and analyze what is important to the community
- Make better community decisions
- Use resources more effectively
- Build trust, improve communications, and encourage productive teamwork and relationships
- Focus on positive community change

When is Visioning Needed?

The process of strategic visioning can be helpful if a community wants to be proactive in future planning or if there is confusion, misunderstanding or hostility in a community about goals, strategies or issues. Community visioning can include topics such as education, safety, economic prosperity, and senior and youth issues. Visioning is often challenging if the community is divided or unable to engage in dialogue because of past or present conflict. Challenges can also result from poor leadership or when those in positions of power are not supportive of the process or outcome. Most importantly, strategic visioning is needed when past visioning statements and related action plans are incompatible, conflicting, outdated, or simply do not meet the current needs of the community.

The Visioning Process

There are generally five steps to a visioning process which each include specific actions and tasks.

TABLE 1: The Five Steps of Strategic Visioning

Visioning Step	Action	Description
STEP 1: Where are we now?	Inventory	Find descriptive data; Identify values
STEP 2: Where are we going?	Trends Analysis	Gather trend data; Determine possible future scenarios
STEP 3: Where do we want to be?	Vision Statement	Identify preferred future
STEP 4: How do we get there?	Action Plan	Determine actions that support vision statement
STEP 5: Are we getting there?	Implement and Monitor	Implement plan; Monitor indicators

Source: Ames (2006)

STEP 1: Where are we now?

The first step to a community visioning process is to create a community inventory that includes important data on the social, economic and environmental aspects of a community.

Start with community meetings or focus groups that generate statements about core values, key standards and specific strategies that will help to define the vision for the community's future. The Asset Inventory and Mapping process provides an opportunity for broad public participation. Survey the community to discover important values, attitudes, beliefs, and knowledge. This information can be compiled into a community profile to better understand your current community situation.

ASSET INVENTORY AND MAPPING

In this approach to community visioning, assets include any item or characteristic of value in a community, and mapping helps identify how the assets are connected. The Asset Inventory and Mapping (AIM) process engages individuals by asking questions and focuses on the positive attributes of a person, a situation, a resource, or the community as a whole. The process concentrates on what is working well, rather than trying to fix what does not work. Instead of focusing on what is lacking, AIM identifies, links, and enhances the core strengths of the community. It is particularly helpful for the community trends analysis and in creating the vision statement. Several key principles when using AIM for visioning:

– Communities change in the direction in which they ask questions; positive questions lead to positive changes.

– With AIM, communities will discover more of what is good. The process is meant to engage the entire community in a discovery of "what is working well around here?"

– People have more confidence to make changes and move into the future (the unknown) when they carry forward parts of the past (the known). Focusing on the positive aspects of the past can lead to a positive future.

– It is important to value differences in ideas, opinions, and assets because these differences are a key part of the visioning process.
Source: Kretzmann & McKnight (1997)

STEP 2: Where are we going?

The next step is to create a trends analysis. First, organize the data collected in Step 1 to determine trends that happened in the past and appear to be continuing in the present. Use the trends analysis to construct probable scenarios or events that are likely to continue. The analysis should be based on factual data to avoid controversy and to better understand where there may be missing data. The trends analysis can be organized using the Community Capitals Framework.

THE COMMUNITY CAPITALS FRAMEWORK

The Community Capitals Framework can be used in all of the visioning steps but is very important when looking at trends. The framework helps to better understand how investments within a community exist, interact and compliment each other. Within each community, there are various assets or capitals that contribute to the potential of a community to develop and prosper. Capital in a community is the stock of accumulated goods and services available at any given time; it is the net worth or value of all of the tangible and intangible items in a community. A community can invest in these goods and services with the hope of increasing the worth of overall community capital.

The community can identify key elements related to the following seven community capitals:

– Financial capital includes the fiscal resources available to invest in community capacity-building. This includes supporting business development, encouraging civic and social entrepreneurship, and accumulating wealth for future community development.

– Political capital reflects access to power and power brokers, such as local, county, state, or tribal government officials, or leveraging resources with a regional company.

– Built capital is the community infrastructure such as telecommunications, industrial parks, water and sewer systems, and streets/roads.

– Natural capital refers to environmental assets (natural resources and amenities) such as parks, farm land, and features of the landscape.

– Cultural capital reflects the way people act and interact, and the values, rituals, customs, and habits that are shared and practiced.

– Human capital includes the skills, abilities, and educational potential of people in a community, and the ability to access outside resources. It also addresses the leadership capacity of a community to be inclusive, participatory and proactive in shaping the future.

– Social capital reflects the connections between people and organizations and involves the ties that create and maintain trust, reciprocity and networking.
Source: Flora & Flora (2008)

STEP 3: Where do we want to be?

With an inventory and framework established, the community should come together to craft a vision statement describing how the future will look when the community achieves its objectives and reaches its goals. The first draft should organize recurring themes that have appeared from the inventory and mapping and trends analysis and any community surveys that were collected. The community may decide that this draft will first be organized by a smaller group of individuals, such as a steering committee.

The vision statement should be brief but detailed about significant attributes of the community, environment, people, and culture; it should describe a clear picture of the preferred future. Look for community efforts including vision statements and strategic plans from the past, as these may be helpful jumping-off points.

THE VISION STATEMENT

The vision statement is the mission of the community and the benchmark or standard by which change is measured. The statement is a critical aspect of the visioning process and should be done deliberately and with as much cooperation from the community as possible. The statement should briefly address the following questions:

– What is important in our community? Is it the geographic location, the culture, the history, etc?

– Who are we as a community and what makes our community unique? What do we want our community to be known for? What are the unique features of the area? Ask the fundamental question, "What is our story?"

– What is our desired future? What is our dream for the future if we had all the resources available to us? Think about the "what if" portion of the statement.

– What attributes should be enhanced? What do we do well and how can we continue on this path?

– What do we want our community to be, or look like in the future?

– How would others describe our community? How do we want others to describe our community?

– What parts of our community do we want future generations to enjoy, remember and appreciate?

STEP 4: How do we get there?

This step is the action planning phase that contains specific actions and strategies that support the vision statement. Create a specific action plan that details the following:

- What is the desired outcome of the plan?
- Who is responsible for accomplishing specific tasks in the plan?
- How detailed is the timeline to meet the objectives?
- Is the budget realistic and are there commitments from funding sources?
- How will the plan be implemented?

STEP 5: Are we getting there?

The final step involves implementing, monitoring and continuously evaluating the action plan to ensure that the plan is being carried out with the intended consequences. In order to effectively monitor and evaluate the plan, identify key indicators so that the community knows objectives are being met. It is critical that the entire community understand the many characteristics of indicators since it is often difficult to determine the qualities of a good indicator.

USING INDICATORS TO EVALUATE ACTION PLANS

An indicator is like a yardstick to measure how well an action plan is being carried out and whether the goals of a strategic vision are being met. Good features of indicators can make it easier to measure the progress of a community visioning process. There are eight desirable characteristics of an indicator:

– *Measurable:* Indicators can be counted to measure change over a given time period. For example, "there were 15 new jobs created in the renewable energy sector in the last two years."

– *Reliable:* Indicators should be measured precisely and accurately. If it is reliable, it should also be repeatable and can be measured accurately by different people. For example, changes in the number of new jobs over a given period of time is a reliable indicator since the jobs can be counted and are an observable fact by anyone.

– *Cost-Effective:* Indicators should be cost-effective, generally using simple equipment and techniques. A measurement that takes a long time to acquire or is expensive is not likely to be analyzed over the long-term. An example is a short survey asking business owners about economic trends and job opportunities.

– *Significant:* Indicators must relate to conditions or features that are important to the visioning process. For example, the community is concerned with attracting new businesses and with identifying jobs that may result from them.

– *Relevant:* The relevancy of the indicator refers to the types of changes from visioning-related activities. For example, did the change in employment opportunities result directly from the visioning process and action plan, or was there another cause for the change?

– *Sensitive:* Indicators can serve as an early warning sign of change. For example, an action plan may call for the creation of five new jobs in a certain sector, and the plan should outline exactly how to create the jobs.

– *Efficient:* Indicators are most efficient if they represent broader conditions and reduce the total number of items that must be monitored. For example, measuring an increase in employment in one sector of the service industry, such as the number of motel staff, may reflect changes in other sectors, such as the revenue stream of the motel, without having to directly measure those changes.

– *Responsive:* The indicator being monitored should be responsive to change. If for example, the community is interested in increasing the number of jobs in the renewable energy sector, there should be a market for those jobs and the potential to create those opportunities. *Source: Phillips (2005)*

How Does our Community get Started?

Timing is an important first step for community members to determine if the community is ready to begin. Members of the community should ask, "Do we have an existing strategic vision that is adequate and accurate? Do we have community support to begin and carry out a visioning process? Do we have the leadership and resources (time, funds) to conduct strategic visioning?"

It is essential to identify key individuals who are willing and able to commit to planning, coordinating, implementing and monitoring the visioning process. These individuals should be part of a steering committee, providing leadership throughout the process. All aspects of visioning, including the duties of the steering committee, should be inclusive of all members of the community, involve a diversity of sectors (youth, elderly, socio-economic, geographic location), and be readily available so that data and plans are accessible and promoted. It is critical to obtain the approval of community partners. Partners may include elected or appointed officials, community business leaders, clergy, school administrators, teachers, and civic organizations.

As the community begins the process, it is important to promote and discuss the intentions, processes and outcomes with the public. Effective communication is critical to a successful strategic vision process. Throughout the process,

be proactive and involve all community members, encourage a diversity of viewpoints, and make information available in all stages of the visioning process. The following should also be considered at the early stages of the visioning process:

- Identify a community coach or find a facilitator who is seen as neutral
- Set up a steering committee and groups of volunteers
- Actively seek out diverse representatives of the community (age, socioeconomic status, new and long-term residents, etc.)
- Organize community discussions; offer dialogue sessions at various times and meeting locations to reduce barriers
- Coordinate a corresponding leadership capacity-building program for all sectors of the community
- Get commitment of resources (time and money) for participation in all steps of the process
- Communicate effectively on the process and outcome and be transparent in providing information at all steps.

Strategic visioning requires strong leadership in order to sustain the momentum of the project and reach an end result that is satisfactory to everyone. The development of a community vision can be a lengthy and time consuming process. It can be difficult not only to recruit and engage the community but to keep individuals invested throughout. In order for strategic visioning to be successful, it requires the process be organized, focused, and well-managed. It also requires the community to be actively engaged, eager for dialogue and change, and concerned about its future.

Regardless of how a community undertakes strategic visioning, the process will likely lead to enhanced trust, increased skills, knowledge and abilities of community members, improved communication and relationships, and a sense of responsibility and teamwork. More importantly, strategic visioning can produce an outcome that will result in positive actions and sustainable healthy communities with enhanced social, economic and environmental changes that can last for generations.

TASKS OF A COMMUNITY COACH

The use of community coaches is becoming an important component in responding to community change. Community coaches do not provide answers; they support capacity-building by helping community members learn from one another and from drawing on their own experiences to help the community find solutions. The coach can reside in or outside the community; they can be paid or unpaid; they can be professional community development practitioners or a new resident who is invested in the welfare of the community.

Key tasks of a community coach include:

- Helping groups see the bigger picture by continually enlarging and clarifying questions and issues.
- Identifying, modeling and illuminating collaborative practices and the value of collaboration.
- Helping teams understand groups that might be potential partners and tying these to the strategic focus.
- Asking clarifying questions about how opportunities relate to the core purpose and current priorities of the community.
- Helping the community to see, discuss and determine what is doable at the intersection of projects, resources and budgets.
- Defining, synthesizing and communicating strategic considerations.
- Identifying and highlighting key learning opportunities leading to new relationships drawing in participants across geography, race, education and income differences. *Source: Emery, Hubbell & Polka (2011)*

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