

Worksheet 1: Need for Planning

Use this worksheet to assess your community's need for planning.

- Instructions:
- 1) Identify existing planning documents your community.
 - 2) Identify minimum legal requirements for planning.
 - 3) Identify important community issues, values and concerns.
 - 4) Use the decision chart to assess your community's need for planning.

Identify existing planning documents:

Title:

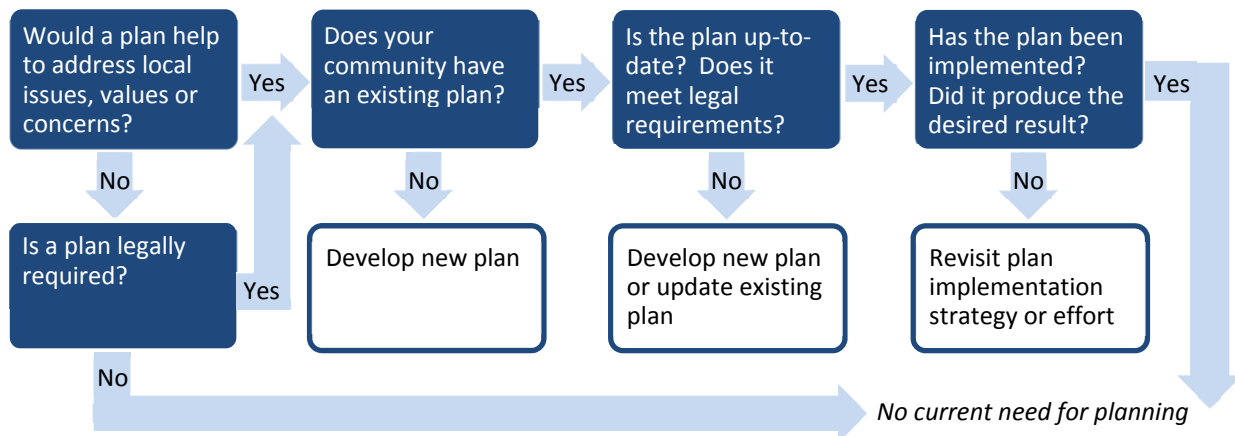
Year:

Up-to-date: (✓)

Identify minimum legal plan requirements:

(ex. content requirements, adoption/updating procedures, etc.)

Identify important community issues, values and concerns that could be addressed through planning:



Worksheet 2: Capacity for Planning

Use this worksheet to assess your community's strengths and weakness related to planning.

Instructions: Read through the following sets of questions to identify strengths and weaknesses of your community. Make notes in the space provided below each factor or on a separate piece of paper. If your community performed strongly across many areas, you will likely do well with planning. If not, you may need to take a step back from planning to build capacity or provide additional education. Community leaders should use their judgment to determine if the community is ready to move forward with planning and at what pace.

	Strength	Weakness
Purpose and Motivation		
Can you clearly articulate the purpose for planning in your community? Did the desire to plan initiate locally, from a perceived need, or externally, as a result of a mandate, funding source or collaborative opportunity? What are some local planning issues? Is planning a priority locally?		
Political Support		
Who are the local decision-makers in your community? Are they aware of and willing to support planning, financially and otherwise?		
Community Support		
Are community members generally aware of and supportive of planning? Are they prepared for controversies that may surface or changes that may occur as a result of planning? Are they willing to commit time, energy and resources to planning?		
Financial Resources		
Does your community have financial resources to support planning? Are there members of the community with experience in grant writing or fiscal management?		
Physical Resources		
Does your community have the physical resources necessary to support planning? Do you have local facilities able to accommodate large public meetings? Is the space centrally located and considered 'neutral turf'? Do you have adequate equipment and supplies?		

	Strength	Weakness
Human Resources		
<p>Does your community have the human and organizational capacity to initiate and carry out a planning process? Does your community have local planning staff or a plan commission? Are there local departments, organizations or citizen volunteers willing to work on planning?</p>		
Skills and Expertise		
<p>Do members of your community (plan commission, staff, residents) have facilitation, meeting management, group process, mediation, budgeting, and other skills necessary for planning? Can you identify those with expertise in local planning issues?</p>		
Leadership		
<p>Can you identify the formal and informal leadership structure of your community? Would existing leaders be willing to act in support of planning? Are they able to influence the general public and local and non-local decision-makers? Can you identify strategies to identify and develop diverse leadership to sustain the project over time?</p>		
Civic Involvement		
<p>Do community members have a strong history of civic involvement? Would they be willing to participate in a planning project? Can you identify strategies to involve a wide range of residents and community groups?</p>		
Communication		
<p>Can you identify the formal and informal modes of communication in your community? Do you have access to these networks? Are local media willing to cover area events?</p>		
Support Network		
<p>Does your community have access to external support systems? Have you worked in the past with neighboring communities, local colleges or universities, the Extension system, county, state or federal agencies, or other support organizations? Does your community trust 'outsiders'? Do you know who to contact for help and what to ask for?</p>		

Worksheet 3: Plan Process Design

Use this worksheet to help design the planning process.

- Instructions:
- 1) Define major stages and steps of the local planning process.
 - 2) Identify tasks to be completed at each stage.
 - 3) Identify parties responsible for completing each task.
 - 4) Identify timeline for completion.

Planning Steps	Planning Tasks	Responsible Party	Timeline
<i>Example</i> Data Collection and Analysis	1. Identify data and information needs	Plan commission, Consultant	August 2012
	2. Gather technical and spatial data	Consultant	December 2012
	3. Verify data for accuracy	Plan commission, Town board, Citizens	December 2012
	4. Analyze data for patterns and trends	Consultant	April 2013
	5. Provide information to citizens and local decision-makers	Plan commission, Consultant	June 2013
Issue Identification			
Goal and Objective Formulation			
Strategy Formulation			
Plan Review and Approval			

Worksheet 4: Detailed Work Plan

Use this worksheet to prepare a detailed work plan for the planning process.

- Instructions:
- 1) Describe specific planning tasks, parties responsible for taking action, and expected outcomes.
 - 2) Describe resource requirements, strategy for obtaining needed resources, and potential challenges.

Planning Task	
Description	Party responsible for taking action
Expected start/completion dates	Others who need to be involved
Expected products or outcomes	

Resource Requirements	Have (✓)	Need (✓)
Financial		
Facilities, equipment, supplies		
Skills, expertise		
Data, information		
Other		
Strategies to obtain needed resources		
Expected challenges		