

APPENDIX 4

OUTLINE OF A COMMUNITY PLANNING PROCESS

Outline of a community planning process

1. Getting started

With key decision-makers (e.g., Executive committee supported by the staff):

- Come to an agreement on planning process and who will facilitate.
- Identify and invite the key stakeholders
- Identify a process for involving community people, other organisations etc. in your project planning
- Collect and review relevant information, research and evaluations that will give you working information about your community needs, opportunities and resources.
- Establish a timeline for the planning process

2. First meeting with all major stakeholders

- Meet with key partnerships members to discuss:
 - The desired directions, mandates and perspectives of the stakeholders
 - The economic, political & other factors affecting your project (i.e. PEST analysis -political, economic, social and technological factors.)
 - Existing or readily available data about your population (demographic, health status, social-economic, environmental, behavioural, etc.)
 - Literature or research about projects, communities, issues related to your situation or information from previous evaluations of similar projects
- Brainstorm the mission, long term goals, outcomes and audience
- Consider the opportunities and threats
- Identify issues for which more information is needed
- Identify a smaller working group to summarise information

3. Explore possible strategies (All stakeholders or smaller groups)

- Review previous work
- Develop the annual goals, audience groups, channels
- Explore potential resources/programs
- Identify possible work groups

4. Develop a draft planning document (smaller planning group)

- A small planning committee, identified at the planning retreat, meets perhaps every second week for 4-6 weeks to draft planning document. This group includes a strategic mix of board, management committee, workgroup members- who really knew the realities and, ideally, a member from the intended audience.

5. Review and refine plan (Heart Health Project Co-ordinator takes the lead)

- Once initial material is developed, the Heart Health Project Co-ordinator compiles the information and examines it using a program logic model. The objectives and outcomes are viewed with the perspective of the health promotion framework (using the cube).
- HH Project Co-ordinator checks logic model for a good mix of approaches, sites etc.
- HH Project Co-ordinator checks if the budget can support this mix of programs and activities

Over time:

- Guiding principles evolve as the work with programs and activities continues. Guiding principles are criteria to make decisions about programs, activities and resources. Some heart health guiding principles have included: accountable to the community, quality products/professional image, sensitive to community needs, multiple risk factor programs, volunteer- based, etc. The guiding principles reflected how to do business and served as a filter to look at new activities.

On a yearly basis:

- Develop annual goals. Each year, perhaps in the fall, revisit project goals and decide if these goals are being achieved. Examine if the mission is being lived out. Celebrate all successes.
- Reaffirm key client group
- Examine programs creatively. (Conduct a one day session with every volunteer, key stakeholders, all work group members, board members)
- Assess what is working well, what will you keep.
- Determine how can you build on existing programs, to extend them to other communities or move from awareness - environmental support. Building on existing successful interventions provides continuity with partners in the community and decreases the workload while reaching outcomes faster.