Vital Aging Network
www.vital-aging-network.org

Vital Communities toolkit

Words of Wisdom about Planning for Vital Communities

The following words of wisdom about planning come in part from focus groups conducted by VAN with individuals who currently are leading planning initiatives for vital communities. Participants are leading **VAN Ventures** or have participated in the **ALVA Leadership Development Program**. We also consulted professional planners in the field of vital aging, including representatives from Area Agencies on Aging, Eldercare Development Partnerships, the Minnesota Department of Health, and cities in Minnesota.

The comments are unfiltered, purposefully raw, and real-time, like planning itself. They allow you to understand planning through the eyes of individual citizens and professional planners who are changing communities at the grassroots level.

Vision
Team Approach
Tools and Models
Flexibility
Communications
Other Components

Vision

"Success requires having a good vision for a project at the start or grounding in a vision that has some teeth to it." —Participant in a vital aging imitative

The primary driver in planning initiatives must be your vision, the collective goal or outcome that you want. The vision is the reason for the planning. You must have a focus, be visionary, and seek expertise as you plan.

- **Focus.** Develop clear strategies up front to get where you want to go. This planning will save time. A clear vision and a set of values hold collaborators together. Even if you do not start out with a detailed plan, you should know what outcome you want and at least identify a general path to your goal. A strong focus also prevents meandering during planning and implementation.

- **Visionary**. Include a person who is a visionary and who can act as a tutor, model, leader, or voice in the community.

- **Expertise**. Sometimes you start with an idea, a vision but don't have the expertise to implement it. Gather a panel of experts with expertise in your topic from a variety of professional backgrounds.

Team Approach

A team approach is a significant factor in planning. A team includes both the people who make decisions and the people whom the decisions affect. Using this approach means being inclusive, drawing in persons from diverse backgrounds and from various generations.

Components of a team include:

- **Charismatic Leadership**. As the leader, you must allow multiple points of view and foster mutual respect between members. You must be focused but flexible, and you must prevent a small core of driven members from disenfranchising other people who need to take ownership for a successful outcome to occur. As a charismatic leader, you also can help a team face any potential negativity that can drain a team's energy.

- **Skill and Experience**. Skill and experience come from various sources. Team members bring different points of view and experiences, and your team might bring in experts to support your initiative. In a small town, you may not have experts available but rather must rely on leaders who care and are impassioned. Some team members may want to function as consultants or may not want to be a part of the intimate planning and details but will help when your group develops concrete tasks.

- **Nurturing Energy**. An effective team supports opportunities for social networking through the group. When you connect as individuals and enjoy one another, you can find solutions that help your community.

Tools and Models

"Nothing legitimizes more than a well-structured survey."
~Participant in a vital aging initiative

Tools and models take various shapes and can help a group provide a context, define a problem, or develop a vision and a plan for action.

- **Data**. Information about your issue from a survey or other tool often can help you make a case for your project to your community and to key decision makers. This data might allow you to create demographic and economic profiles of your community, to identify the needs and desires of your community's members, and to determine the financial impact of your project.

  Data can be quantitative (numbers) or qualitative (words). You must analyze your data at the level that makes sense for your goal. You may not need a demographic profile with a broad scope but rather require a tailored, detailed description of your community.

  Presentation of data can also take different forms. Sometimes, you should present data in charts or pictorially and other times in narratives or tables. You often can obtain the required data from a local agency that focuses on aging.

- **Surveys**. Nothing legitimizes your effort more than a well-structured survey. It can help you develop your plan to meet your goal. It can be a powerful tool that allows you to become familiar with the community; that is, what is happening at a grassroots level, and to find other people with whom you can collaborate. Determine how you will make use of information from a survey before you perform it. Then the survey will provide the information you need.

- **Planning Maps**. Planning maps provide a visual representation of elements of a plan. Use of planning maps can be helpful in translating a vision into a concrete plan. They help you visualize an idea or concept to make it easier to set specific and workable goals. Planning maps also can help you set priorities and develop strategies.

- **Focus Groups**. Focus groups provide feedback from a representative group of your community's members that can help you pinpoint a community's needs. They can identify indicators that measure quality of life or other criteria to help in comprehensive planning.

- **Internet Research**. The Internet is a valuable resource. It provides you with the ability to perform extensive research to obtain information not available or easily accessible in the past. You can identify models and best practices to use in your project.

- **Human Resources.** Beyond your team or network, you want to include other people in your planning, such as experts, advocates, and professionals in a relevant field. You also should involve your broader community. Interviews with key informants can help you learn more about individual or organizational needs and desires in your community.

Flexibility

"Be able to roll with the changes and glitches, whether they are perceived or real barriers."
~Professional Planner

Things do not always go as planned. You must maintain the flexibility to notice when you should make changes and the ability to react to changes when you experience them.

- **Ability to Change.** To be successful, you must go where the planning takes you. The ability to change gives you and your collaborators the flexibility to modify your design while maintaining your vision.

- **Learn from Mistakes**. Learning from mistakes can help you shape your future path and potentially prevent future mistakes. Analyzing your mistakes also allows you to take into consideration any adaptations that you may want to implement based on new knowledge or technology. Examining initiatives and plans that have failed can provide you with interesting and helpful information.

- **Leading with Flexibility**. Leading is different than managing. As a leader, you must be flexible enough to take guidance from the members around the table. You must recognize changes in paths and facilitate transitions that allow your group to achieve the intended goal.

- **Contingency Planning**. Good plans often define contingency plans and exit strategies. A contingency plan is your Plan B. It offers a predefined path that you can follow when the circumstances of your project change. Exit strategies provide specific steps to end your project when planning cannot continue in the same manner.

Communication

Communication is vital. When you talk to other people about an issue, you can find common ground, and the discussion can help build each individual's ownership of an idea. Some critical components of communication include:

- **Technology**. Good communication requires access to the Internet and use of e-mail. A web page is important if you want to make your message known to people not in your small network.

- **Effective Communication**. You must have a vehicle for communication, such as an e-newsletter, that offers recent news and lists activities for your project. Effective strategies for communication foster the cultivation of relationships and help others buy into your vision.

- **Basic Meeting Management Tools**. To create a plan and implement it, you must set ground rules about the way in which you and your collaborators will function. Ground rules do not have to be as structured as Robert's Rules of Order, but

following some rules will help you keep the group on task and provide strong management of your time. Running a meeting can be a difficult task, and often groups rely on professional facilitators.

Other Components

Planning can be an extensive and often overwhelming process. Some other topics that you might want to consider include:

- **Funding and Grant Writing**. Before you can secure funding, you must figure out how to tell the right story. Making your case is an important task that allows you to secure funding. Public and private partnerships can provide a start for the story, but incorporating your thoughts and vision into a grant application takes resources. Some individuals or groups will not participate if you do not have funding, particularly if the initiative will have a broad impact within a community. If you have a good product and can tell your story, the money will flow.

- **Staffing**. Even if you provide the leadership, you need collaborators because planning and implementing a project require a lot of behind-the-scenes work. The availability of support staff often is critical to the success of an initiative. If staff is not available, you should set clear roles for all collaborators that incorporate some duties of support staff for each person.

- **Evaluation**. Celebrate your successes along the way and evaluate your mistakes as learning opportunities. You might offer carrots or incentives to your group that become available when you achieve a goal. A celebration can be one type of carrot that might drive people to achieve.

- **Rural Communities.** Rural planning has some unique components. A county or a regional entity and experts, who sometimes are a community's leaders, typically conduct planning on a larger scale. Often you must find a key advocate among these groups for successful planning to occur. These individuals may be county commissioners, staff of a library or school, or other stakeholders. Organizations that can help you find key stakeholders might include an agency on aging in your local area or a regional development commission.

- **Timing.** Time often is a critical factor in the success of a plan. Flexibility is a key quality when you face a need to alter plans or to bring stakeholders back together to discuss issues. Postponement of deadlines is often inevitable but does not mean that you should scrap a vision or a goal.