

# Community Resilience Toolkit 2.0

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Tool:

## Creating Your Plan For Change

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## Community Resilience Toolkit 2.0

The Community Resilience Toolkit 2.0 brings out your best ideas for building resilience where you live.

The Community Resilience Toolkit 2.0 is a collection of online tools to learn about the local impacts of the climate and energy crisis, and what you can do about them.

The Toolkit is designed for use by individuals, community groups, teachers, and municipalities.

To view and download free copies of all the tools in the Community Resilience Toolkit 2.0, see [www.rootedinresilience.org/toolkit](http://www.rootedinresilience.org/toolkit).

Rooted in Resilience's mission is to inspire and support you in building equitable, resilient communities.

Support this work and become a member of Rooted in Resilience!

## Creating Your Plan for Change

### *What this Tool Does*

The Creating Your Plan for Change Tool helps you:

- Agree on your group's most strategic goals
- Break them down to bite-sized strategies
- Build community support to make them happen

### *Who Should Use this Tool*

- Community organizations and groups
- Non-profit organizations
- Municipal planners

### *How to Use this Tool*

If your group is large, first nominate a smaller planning committee to work through these steps and report back to the larger group. Make sure your planning committee is made up of dedicated and informed people who will see your project through.

Review the ten step process outlined here and identify which steps will be most helpful for your group. You don't need to do them all, or in this order.

Going through this process takes time. If your planning committee has regular two hour meetings, plan for one or two steps per meeting. If you are planning in a retreat, do as much advance research and prep work as you can beforehand so you can make informed choices.

Doing your background research, outreach, and informed planning early will ensure you are working as strategically as possible. To be most effective, plan before you act!

# Creating Your Plan for Change

## Design Your Plan

Twenty five centuries ago, Greek Philosopher Heraclitus said “Nothing endures but change.” Kids grow up, new technologies are invented, new leaders emerge, and surprises happen - both good and bad. While it seems like we have little power over some change, change can be meticulously orchestrated by small groups of motivated people. Climate change and peak oil are largely unforeseen consequences of changes made by many people over many decades.

With the challenges we’re facing now our communities will change whether we want them to or not. The question is, what would we like to see happen, and what role are we willing to play in achieving it?

It’s up to you. You can create the change you want to see.

This tool leads your group in creating a community resilience plan tailored to your group’s interests and ambitions. It will not tell you what type of plan to make or what you need to do: that part is up to you. Do what your group feels is most important and interesting. You will create your vision, set goals, devise strategies to implement them, and commit yourselves to doing so. This section leads you through this process in ten steps. As always, feel free to adapt this material to best fit your group’s needs.

Finally and importantly, this tool also offers resources for evaluating the effectiveness of your workshop and planning process. We appreciate you sharing the results of these evaluations with the developers of this toolkit so we can improve future editions. Send comments to [toolkit@baylocalize.org](mailto:toolkit@baylocalize.org).

## Step 1: Decide on the Scope and Scale of your Plan

How extensive do you want to make your plan? That will depend on what kind of group you are: a county commission designing policy for a twenty-year regional adaptation plan? A community group designing an energy descent plan for your city? Or neighbors who want a fun, hands-on project to build community? Any of these are good and necessary plans - the point is to start taking steps down the path. Whatever your type of group, ask yourselves the following questions:

1. For what purpose did your group come together? Honor the reason you were formed or what motivated people to get involved. Harness the passion that those who formed it bring to the table.

Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.  
-Margaret Mead

2. How long will you work on implementing your plan? Three months or ten years? Make a plan that you can implement in your time frame.
3. How much time, energy, and resources will your group dedicate to designing and implementing your plan? You're not limited by your initial resources, as you can always use them to bring in more assets – but a realistic assessment of your initial capacity can help you plan for early success.

Your responses to these questions may look like the following:

*Example 1.*

The County Economic Development Task Force is charged with designing a coordinated multi-agency ten-year economic development plan to position Alameda County in the new economy. We have an initial budget of \$1.5 million allocated for the next three years.

*Example 2.*

The Spaulding Street Block Group gathered to identify one simple, effective project we can implement together over the next six months to get to know each other better and help each other through hard times. Our core organizing group of seven neighbors will each volunteer ten hours per month, then after six months we will plan the next phase of our effort.

Grounding yourselves with a solid, common understanding of what your group is about will help guide your next steps of setting visions and goals.

## Step 2: Describe Your Vision

Envision the future reality you would like to see. For example, Olympic athletes visualize their bodies swimming a world-record race or perfecting a beautiful spin in the air. Envisioning the reality you want to achieve is a powerful step toward making it happen.

Vision statements describe this reality you'd like to create in the future. Feel free to think ambitiously and creatively – it's fine to describe big changes that may not happen for many years, and that your group does not intend to accomplish on its own. The idea is to have a picture in your heads of where you'd like to move towards. Remember that big change does indeed happen, and in fact we need it to happen. Your group probably already started thinking about elements of your vision in Parts 1 and 2, which should give you some ideas to build on.

*Example 1.*

The County Economic Development Task Force envisions a county-wide economy in 2020 that 1) offers meaningful economic opportunities that can support all county residents and their families, 2) conserves and makes best use of regional natural resources, 3) uses 80% less fossil fuels, and 4) adequately supports local government services through a strong tax base.

*Example 2.*

The Spaulding Street Block Group envisions a block in which all residents know and support each other and can provide for our basic needs together in the case of any emergency.

You could collaborate on a common vision statement, or have each group participant come up with her or his own vision and then identify common threads.

### Step 3: Analyze What You've Learned About Your Community

Before you decide on specific actions to work toward your vision, take a moment to summarize what you've learned about your community. In which areas does your community rate highly for resilience, and which areas need improvement?

An easy way to summarize this information is to do a SWOT analysis with your group. SWOT stands for “Strengths, Weaknesses, Opportunities, and Threats.” Strengths and weaknesses generally refer to conditions within your community, as identified in your resilience ratings (see Resilience Assessment Tool). Opportunities and threats generally refer to influences from outside the community, although they can occur from within the community as well.

**Strengths:** Refer to your notes from the resilience ratings in Part 2. Identify assets and factors that made your community rate highly (3-4). Add other important strengths not yet covered.

**Weaknesses:** Again, refer to your notes from the resilience ratings in Part 2. Identify factors that made your community rate poorly (0-2). Add other important weaknesses not yet covered.

**Opportunities:** Refer to notes from the action menus in Part 2. Opportunities could include federal, state, and local legislation and programs you would like to take advantage of, campaigns you'd like to get involved in, model programs and policies you'd like to replicate, your allies' momentum in promoting an idea, and trends you'd like to hook into.

**Threats:** Refer to notes from your discussion in Part 1 about how climate change, peak oil, and economic instability may affect your community specifically. Also add other threats that are of concern to your community.

Here's an example of a SWOT analysis from a theoretical Bay Area city:

|                 | Helpful   | Harmful   |
|-----------------|---|---|
| Mostly Internal | <p><b>Strengths:</b></p> <ul style="list-style-type: none"> <li>• Many diversified local farms in region.</li> <li>• Responsive local public water utility.</li> <li>• Well-organized neighborhood associations.</li> <li>• Good local community college starting green jobs training.</li> <li>• Maybe potential for micro wind turbines?</li> </ul>     | <p><b>Weaknesses:</b></p> <ul style="list-style-type: none"> <li>• Not enough community gardens to meet demand.</li> <li>• Poor public transit system.</li> <li>• High costs of housing, many workers commute from afar.</li> <li>• Economic dependence on local auto mall, which is going bankrupt</li> <li>• City cutting budget due to loss of tax revenue.</li> </ul> |
| Mostly External | <p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• City beginning climate action planning process.</li> <li>• SB 375 could provide incentives for affordable housing development.</li> <li>• Safe Routes to Schools program looks like a potential good funding source.</li> <li>• Interested in exploring cohousing model.</li> </ul> | <p><b>Threats:</b></p> <ul style="list-style-type: none"> <li>• Residents next to Bay may need to relocate with sea-level rise.</li> <li>• Large low-income population vulnerable to inflation, especially food and housing prices.</li> <li>• Large portion of children with asthma vulnerable to poor air quality during heat waves.</li> </ul>                         |

Once you've filled in your SWOT analysis grid, put a star by the items you listed that seem most important, urgent, or useful. Then sit back and consider your grid together. What themes do you see? What does it tell you about priorities for your community and your group?

## Step 4: Set Goals

The next step is to identify goals your group wants to work toward. Think a moment about both your vision for the future and how your SWOT analysis describes your community's present. What will it take to lead your community from its present to the future you want to see?

There are many ways to work toward a vision, and at some point your group will probably run into the creative tension between having many potential goals and objectives, and realistically not having the capacity to address all of them. You will need to decide how to prioritize which ones you will work on. The facilitation notes offer tips on how to do this.

There are a variety of styles of writing goals, objectives, and strategies, which can get confusing. We offer one interpretation of these terms here, but feel free to use any your group prefers. Be consistent, and apply the "SMART" criteria to get specific at some point (see explanation in Step 6).

**Goals** describe future outcomes your group plans to create. They have a general focus on ends rather than means, and provide programmatic direction.

### *Example 1.*

County Economic Development Task Force Goal 1: The County hosts a vibrant remanufacturing sector offering living wage jobs to residents.

### *Example 2.*

Spaulding Street Block Group Goal 1: Neighbors on our block know each other and share extra backyard garden produce with each other.

You may need only one goal, or several. Try to keep the number of goals small, so your group doesn't feel overwhelmed when trying to implement them. Accomplishing one goal can create a sense of momentum, a cohesive group, and strong outcomes, while working on too many goals can lead to not being able to complete them. You can set some goals aside and agree revisit them later when your group has more capacity.

Research whether other groups in your area are already working toward your goals, or similar ones. This will allow you to avoid duplicating efforts, or join forces with others to achieve common or mutually supportive aims.

Developing goals can be a messy and time-consuming process, but it is also an investment in your future success. Allow plenty of time for discussion and decision making, and keep the tone positive.

First, lead your group through a **backcasting** exercise to think through what it will take to lead your community from its present to the future you envision. Facilitate this as a group brainstorming exercise while a note taker records ideas where everyone can see them.

Start with a point in the future when your vision is realized. What year do you think it might be? What were some of the last steps that lead to your vision being realized? What steps came before that? Keep thinking back through the steps needed to achieve your vision until the present. Each of the steps identified in your backcasting exercise could be a potential goal for your group.

The process of deciding on goals will probably require prioritization of all your possibilities and choosing some while rejecting others. A smaller group could simply refer to your backcasting notes and shape and discuss potential goals until you come to agreement. For a more facilitated process, try a combination of the following ideas.

In a mid-sized or larger group, try a modified **open space** technique. First explain the process to the group. Place a stack of paper and markers in front of the group, and invite participants to come up and write in large letters a couple of words describing a goal they would like to develop. These participants become leaders for discussion groups on these topics, and stand in front with the piece of paper so everyone can see them.

When all potential discussion leaders are in front of the group, ask each to choose and announce a place where her or his group will meet. Other participants choose a group to join. Participants are free to switch groups as often as they wish. If no one joins a discussion leader, encourage her to consider developing her idea on her own. Groups are welcome to merge if the two leaders agree to do so. Each group chooses a note taker, and if this person would like to switch to another group, she first finds a replacement for herself. The purpose of each small group is to refine one goal statement to present to the group. After a given amount of time, call the group back together and ask each discussion group to present its goal.

Next, do a **reality check on your capacity**. Remind yourselves how much time or resources you are willing to invest, and decide how to limit the goals you will take on. You can always set some goals aside and agree to revisit them when you have more capacity.

Now you need to prioritize. One way to see where a group's interests and passions lie is a sticky dot exercise. Post each goal on a large piece of paper on the wall around the room. Give each participant the same number of stickers of green, yellow, and red dots (limit the number of red dots). Ask participants to stroll around the room and place their dots according to their interest and support for each proposed goal. Green indicates support, yellow indicates questions or reservations, and red indicates strong concerns or a veto. Emphasize that the red dots should only be used if the participant feels strongly that the group should not work on a given goal.

When participants have finished allocating all the dots they wish to use, call the group back together. Discuss the results of the exercise. Does it help your group identify goals that would garner enthusiasm, or create divisions? Would the proposed goals move you effectively toward your vision? Respect and create a safe space for the voices of those who have raised reservations or issued a veto, especially on popular proposals. Encourage the group to work to understand their underlying concerns.

Another approach is a **grid analysis**. Identify decision making criteria, and assign each a weight according to its importance to your group. Create a grid and list the goals you are considering across the top row, and the criteria down the farthest left column. Ask each participant to rate the proposals based on the criteria, and add the weighted results in each square. Then calculate the final tally for each proposal.

Be careful about using either of these approaches as your final decision making method, as you can end up with results that many group members may be unhappy with. We recommend using them to inform your discussion rather than to make final decisions.

Your final decision process depends on the culture of your group. To ensure all members of the group feel ownership over the decision and commitment to carrying it out, consider using a consensus process. Do some reading on consensus decision making before trying it out for the first time. Wikipedia, an organization that uses consensus decision making, describes the process as:

**Discussion of the item:** The item is discussed with the goal of identifying opinions and information on the topic at hand. The general direction of the group and potential proposals for action are often identified during the discussion.

**Formation of a proposal:** Based on the discussion a formal decision proposal on the issue is presented to the group.

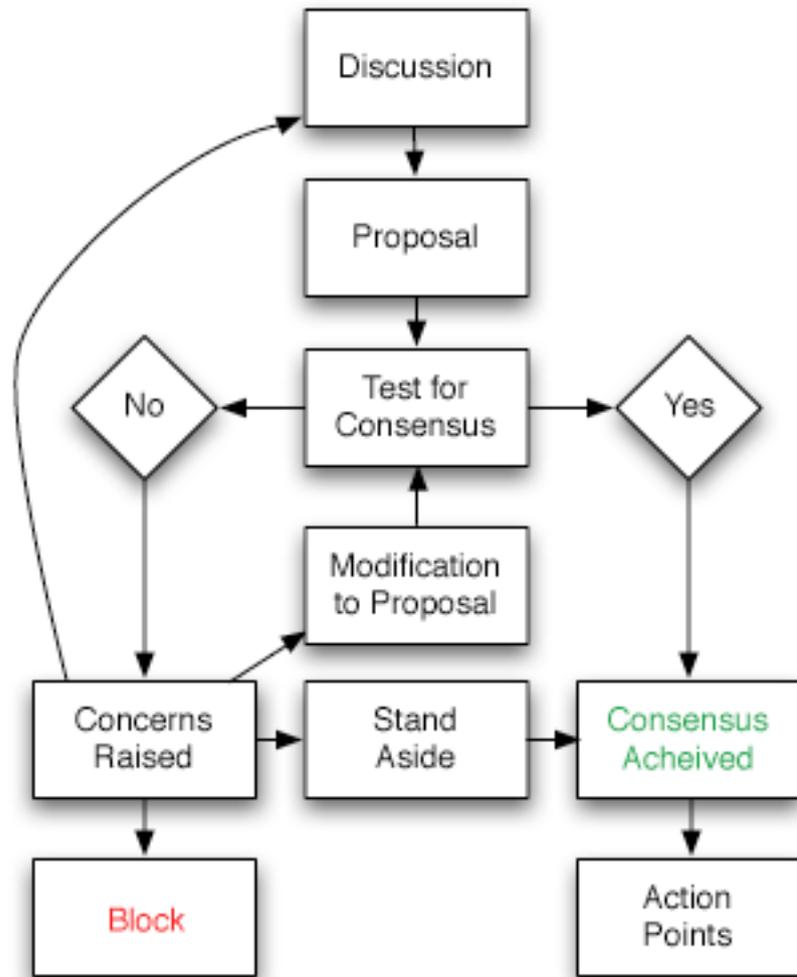
**Call for consensus:** The facilitator of the decision-making body calls for consensus on the proposal. Each member of the group usually must actively state their agreement with the proposal. Group members either agree, stand aside, or block the decision. In larger groups positions can be indicated by holding up color coded cards. Or a group member could request further discussion before a decision is made.

### Identification and addressing of concerns:

If consensus is not achieved, each dissenter presents his or her concerns on the proposal, potentially starting another round of discussion to address or clarify the concern.

### Modification of the proposal:

The proposal is amended or re-phrased in an attempt to address the concerns of the decision makers. The process then returns to the call for consensus and the cycle is repeated until a satisfactory decision is made.



Flow chart of consensus decision-making process.  
Source: Wikipedia.



Carla Perez shares her opinion during a workshop.  
Photo: Kirsten Schwind.

## Step 5: Analyze How to Achieve Your Goals

Before you develop more specific objectives and strategies to implement your goals, take a moment to think strategically about how to work with the forces already impacting the change you want to create. If your goal is simple and straightforward - for example, the Spaulding Street backyard produce exchange - you can skip this step. For more complex goals, however, this analysis can help you plan the easiest path to implementation by identifying and recruiting important allies while neutralizing any roadblocks or opposition.

Force field analysis is a method for listing, discussing, and evaluating the various forces for and against a proposed change. Forces that help you achieve the change are called “driving forces.” Forces that work against the change are called “restraining forces.” See the diagram and facilitation notes on how to conduct this analysis.

Use the force field analysis to help you identify your decision makers: the people with the power to make different aspects of your goal a reality. It could be just your group, but often it will include outside actors as well.

Here are examples of decision makers who would play a role in achieving the following goals:

### **Building a neighborhood community garden**

Decision makers: owner of vacant lot, city zoning department, city department of public works, local water utility, city council, local residents (potential gardeners)

### **Safe Routes to Schools program to install more bike lanes**

Decision makers: mayor, city council, public works department, Department of Transportation (gives grants), school district, school parents, students

### **Blocking a proposed gas-fired power plant in your community**

Decision makers: California Energy Commissioners, energy corporation building the plant, Bay Area Air Quality Management District, city council, mayor, local community groups

Your decision makers may be potential allies, opposition, or somewhere in between. Generally, it’s easier to engage with them in the long term if you make them into allies, though when fundamental interests diverge this may not be possible.

Whatever your relationship with your decision makers, you will need to convince them to take the action you want them to take. To accomplish this, analyze what motivates their actions, and how to work with these motivations.

Prepare a large force field diagram that all participants can see. Explain the purpose of the activity to participants, and fill in the force field diagram together. Repeat the activity for each of your goals as needed.

1. Brainstorm a list of driving and restraining forces affecting your goal, and record them on the chart in the appropriate column.
2. Assign a score to each force, from 1 (weak) to 5 (strong). The score is based on (a) the strength of the force and (b) the degree to which it is possible to influence this force.
3. Tally the scores on each side.
4. Decide if the goal is achievable and realistic for your group.
5. If so, brainstorm how to:
  - Strengthen positive forces
  - Neutralize negative forces

Forces to consider:

|                              |                                 |
|------------------------------|---------------------------------|
| Decision makers' motivations | Costs                           |
| Vested interests             | Available resources             |
| Regulations                  | Present or past practices       |
| Organizational structures    | Institutional policies or norms |
| Relationships                | Social or organizational trends |



Relationships with media can be driving forces. Here Maya Donelson of Graze the Roof speak with New York Times reporter Marion Burros. Photo: Kirsten Schwind.

## Sample Force Field Analysis

**Goal:** The County hosts a vibrant remanufacturing sector offering living wage jobs to residents.

**Key decision makers:** Businesses, city zoning boards, industrial building owners, financiers.

| Driving Forces  | Strength (1-5) | Strength (1-5) | Restraining Forces                                    |
|---|----------------|----------------|---|
| Local development banks interested in financing   | 3 →            | ← 5            | Difficult for start-up businesses to get financing    |
| Potential financing interest from major investors   | 4 →            | ← 5            | Local banks have limited capital                      |
| Support from city councils, mayors, and chambers of commerce  | 3 →            | ← 1            | Opposition from big box retailers (competition)       |
| Small Business Administration and Network of Worker Owned Cooperatives will partner in business development | 2 →            | ← 2            | New sector, few viable businesses to recruit          |
| Good political connections on zoning boards   | 2 →            | ← 3            | Difficult to find industrially zoned space, expensive |
| <b>Totals:</b>  | <b>14</b>      | <b>15</b>      |   |

**Conclusions:** While the “restraining forces” total is slightly higher, there are still significant “driving forces.” The Task Force would probably have decided that this is an achievable and realistic goal for the county to take on.

## Step 6: Set Objectives

Now that you have a clearer sense of what it will take to reach your goal, develop more specific objectives.

**Objectives** tell how to meet a goal. They are clear, realistic, specific, measurable, and time-limited statements of action which move you toward your goal.

Use the “SMART” formula when writing your objectives:

- S** = Specific
- M** = Measurable
- A** = Achievable
- R** = Realistic
- T** = Time framed

Our planners at the county or on Spaulding Street might write the following objectives to support their goals above:

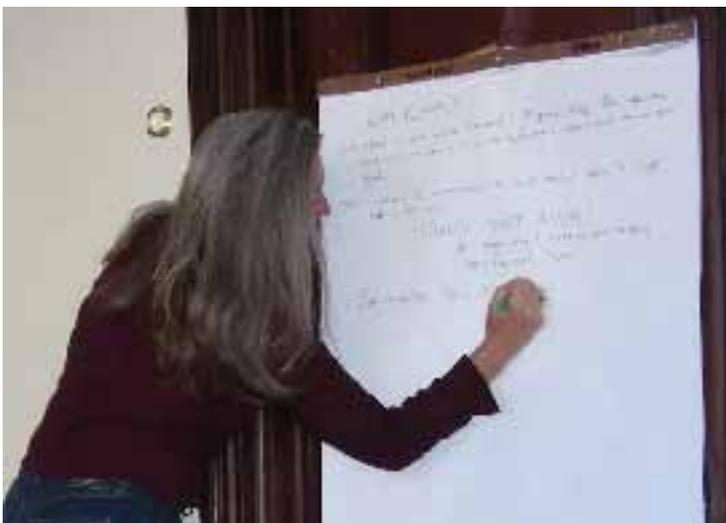
### *Example 1.*

County Economic Development Task Force Objective 1: The County attracts ten new remanufacturing companies providing 500 new jobs by 2015.

### *Example 2.*

Spaulding Street Block Group Objective 1: Within one month organize a series of eight backyard BBQs and produce exchanges rotating between different neighbors’ houses. At least 90% of neighbors attend at least one BBQ.

Writing SMART objectives should make it easy to measure your success toward meeting your goal. They can also communicate your own confidence in your project, which is helpful in recruiting more participants and building up other assets.



Kat Steele facilitates a planning process. Photo: Kirsten Schwind.

## Step 7: Identify Assets

At this point you should be getting a clear picture of what assets would be useful in achieving your objectives. Brainstorm a list of specific assets in your community you would like to approach.

Our planners at the county or on Spaulding Street might identify the following assets:

*Example 1.*

County Economic Development Task Force Assets:

- Local community development banks
- Small Business Administration
- Network of Bay Area Worker Owned Cooperatives
- Contacts within the Remanufacturing Industry Council
- Contacts with major investors
- Community colleges
- Possible access to industrially zoned land at the decommissioned Navy base
- Ability to offer financial incentives
- Eligibility to apply for state and federal programs

*Example 2.*

The Spaulding Street Block Group Assets:

- Many neighbors have extra backyard produce to share
- Maria developed a contact list of all neighbors on the block
- The project can be launched at the annual 4th of July Block Party
- Judy's teenagers can babysit smaller children at gatherings

## Step 8: Start Developing Strategies

**Strategies** describe the steps you'll take to use your assets to meet your objectives. Examples could be "meet with mayor to ask for support," or "write op-ed in local paper." Your strategies will evolve as new information, opportunities, and challenges arise. Develop as many strategies as you need for each of your objectives.

Again, think about the needs and interests that motivate your decision makers, and strategize about how to work with these. For example, candidates in a local election are interested in access to voters, so you might organize a candidates' forum on your issues in front of a large audience. Or a corporation citing a polluting power plant in your neighborhood needs to make a profit for its investors. You could convince the corporation that the cost of running a plant in your neighborhood is not worth it, or that it could make a higher return by investing in a clean energy project instead. Down the road the same corporation could become an ally.

### Example 1.

#### Strategies for the County Economic Development Task Force Objective 1:

- Establish a joint business development program with Small Business Administration, Network of Bay Area Worker Owned Cooperatives, community development banks, community colleges, and private investors.
- Develop a 5-year budget for the program.
- Apply for state and federal grants.
- Identify industrial space that businesses could occupy, and establish contact with appropriate commercial leasers.
- Host a breakfast briefing for area elected officials and remanufacturing entrepreneurs launching the program.
- Host a series of workshops and receptions for remanufacturing entrepreneurs thinking of establishing themselves in the area.
- Host a business plan competition focusing on the remanufacturing industry, offering seed capital as a prize.
- Collaborate with the local community college to offer courses on remanufacturing, starting new green businesses, and starting new worker cooperatives.
- Contract with a local marketing firm to market the program.
- Convene a stakeholders' process including the business community and labor to develop county local hire and living wage policies.

### Example 2.

#### Strategies for the Spaulding Street Block Group Objective 1:

- Maria and Jim organize annual 4th of July Block Party to launch project.
- Tom signs up neighbors to host backyard BBQ potlucks every other Sunday for the rest of the summer and fall.
- Diego's kids design and distribute fliers with the summer BBQ schedule to all houses on block, and invite neighbors in person when possible.
- Shawna and Jordan host the first BBQ potluck and produce exchange two Sundays after 4th of July.
- Judy's teenagers will watch smaller kids at BBQs.



Alicia Schwartz and Ingrid Severson discuss chayotes. Photo: Kirsten Schwind.

## Step 9: Plan to Measure Your Impact

To track your success, gather the data you need to measure the impact of your actions as you go. It helps to start with SMART objectives, as they are written to be measurable. Relatively simple ways to start gathering some data include:

- Count the number of participants at meetings.
- Ask participants to fill out simple evaluation cards at the close of workshops or meetings.
- If you set up a website, measure the traffic it generates.
- Conduct random phone surveys with participants after an activity to see if they think the activity had the desired impact.
- If your project deals with material goods, for example backyard produce, keep track of how many pounds are distributed.
- If your project involves saving money, water, energy, or something else, track how much is being saved.
- If you are trying to get an idea into the public discourse, track the number of media stories you generate and the estimated audience of each media outlet.

There are many ways to gather data to track your impact, so think creatively.

Tracking your impact allows you to tell others about your success in concrete terms, and recruit more assets to help you in the future. If your data indicates you are not having the impact you wanted to, that is also valuable information to reassess your objectives and strategies.

### *Example 1.*

Evaluation Plan for the County Economic Development Task Force:

- Track number of participants at project workshops and receptions.
- Track number of remanufacturing businesses established in county through review of new business licenses.
- Track quantity of total investment capital raised through joint program (consult with banks and investors on how to do this while maintaining confidentiality).
- Contract with local community college professor to design a study to track local jobs and economic activity created by new remanufacturing companies.

### *Example 2.*

Evaluation Plan for Spaulding Street Block Group:

- Betty and George volunteer to weigh produce exchanged at BBQs and track the number of neighbors participating.
- Larry's Café will donate a \$50.00 gift certificate to the household that gives away the most produce over the course of the summer.
- Rosa will write a story for the local paper at Thanksgiving reporting on the results.

## Step 10: Secure Commitments and Next Steps

Great, you've got a plan! Now take a moment to:

1. Review your plan and see if there are any actions or steps that haven't been clearly assigned to someone yet. Decide who will take responsibility for them.
2. Decide on what your next steps are. Set the next meeting date and assign yourselves tasks to be done by that date. Consider establishing a regular meeting time and date that group members can put on their calendars.
3. Discuss how you will support and keep each other accountable in carrying out your plan. One method is to take notes at each meeting indicating your commitments and timeline for finishing them, and review them at the next meeting. Keep the tone of your meetings positive and friendly - the main reason volunteers stay involved may be because they enjoy the social element. Take time to get to know each other, offer praise for good work, celebrate progress, and enjoy each others' company.



Rooted in Resilience building the movement at an annual Holiday Party for friends and allies.