



Strategic Planning Overview
For Co-chairs and Facilitators

This is a guide for co-chairs and facilitators for the Envision 2030 Strategic Planning Process. It includes the information in the Participants’ Guide, which is available for everyone who joins an Envision Planning Group, plus additional material to help co-chairs and facilitators with their jobs.

The additional materials include:

- Job descriptions for co-chairs and facilitators
- A detailed outline of the “four-meeting model,” which describes how the Planning Groups can accomplish their work in four work sessions (not including the Jan. 27 Orientation)
- Some suggested “easel templates” that facilitators might want to use to keep track of information and ideas.
- Special instruction on helping your group prioritize their ideas in the final Work Session.

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Note: An Adobe Acrobat version of this guide is available on the Envision 2030 web site at www.envision2030.com/planning.

What is Envision 2030?

Community visioning is a process for engaging large numbers of citizens in thinking about and planning their community's future. In doing so, visioning helps create consensus, opens the door to new ideas and strengthens citizen support for action. Envision 2030 is a community project, and participation is open to everyone in the community.

The goals of the yearlong Envision 2030 are:

- Goal 1 - Engage hundreds of citizens in describing or visioning the community they would like to live, work and play in for the next 25 years.
- Goal 2 - Take the comments and information from the community vision meetings and draft a Common Vision that captures the major themes and elements.
- Goal 3 - Convene planning groups comprised of citizens from Cumming-Forsyth County to draft recommendations for achieving the Common Vision.
- Goal 4 - Invite the community to review and critique the work of the planning groups.
- Goal 5 - Make every document and decision available for public comment through open meetings, unprecedented public communications and an accessible web site.

Last fall and early winter, we accomplished Goals 1 and 2. With this strategic planning process, we are beginning work on Goal 3, drafting recommendations for achieving the Common Vision.

About This Guide

This is a guide for members of the Envision 2030 planning groups. Its purpose is to help you understand the process we'll use for this phase of the visioning effort and how you might fit into these groups' work. If you have questions or suggestions, please contact Leigh Crow, project manager of Envision 2030, at (770) 887-6461 ext. 28 or e-mail her at lcrow@cummingforsythchamber.org.

You'll find, on a separate sheet, the Common Vision and a list of the four planning groups and their assignments.

How the Planning Groups Are Formed

The Envision 2030 Steering Committee has formed four broad planning groups and assigned two to three “strategic objectives” to each – elements of the Common Vision that must be accomplished in order for the overall vision to be achieved. The Steering Committee has appointed co-chairs and a facilitator for each group and invited some citizens with expertise or experience in these areas to join the planning groups – but any Forsyth County citizen may join a planning group and participate fully in its work.

The Groups’ Work Process

The planning groups will decide how they want to approach their work – whether to form subgroups, how many times to meet and so on. But we believe that most of these groups can accomplish their assignments in four working sessions (following the orientation and organization meeting on Jan. 27). For that reason, we suggest that the groups meet at the same time and place for most of their work, so we can provide some facilitation services.

Here are the four meetings (after Jan. 27) that we suggest the planning groups convene:

Meeting 1	Tuesday	Feb. 6	7:00 p.m.	Otwell Middle School, Cumming
Meeting 2	Tuesday	Feb. 20	7:00 p.m.	Otwell Middle School, Cumming
Meeting 3	Thursday	March 15	7:00 p.m.	Otwell Middle School, Cumming
Meeting 4	Thursday	March 29	7:00 p.m.	Otwell Middle School, Cumming

The meetings will last two or three hours. So, for a 7:00 meeting, please plan on staying until 10:00 p.m.

Subgroups: The planning groups have been assigned more than one strategic objective and may decide on Jan. 27 that they would like to work on these tasks as a single large group – or divide into smaller groups.

If you do divide into smaller groups, we suggest that you convene as a single group at the beginning and end of every work session to discuss the evening’s work and, later, your progress. We also suggest that each subgroup have designated leaders and resource people (see below).

Additional meetings: Some planning groups may decide that they need more than four working sessions. If your planning group would like help in arranging for meeting space, please contact Leigh Crow at (770) 887-6461 ext. 28 or e-mail her at lcrow@cummingforsythchamber.org.

Resource people: We strongly urge that each planning group appoint several important resource people for the group’s work (and for each subgroup). There are two kinds of resource people that will be needed:

- **Citizen idea readers** who will read all of the citizens’ ideas pertaining to the group’s work from the 15 vision meetings (plus ideas sent to Envision 2030 through the web site), highlight the ones they think are most important and remind the group of these ideas from time to time.
- **Information gatherers** who will do research at the group’s direction between meetings and help bring objective information to the planning group for its deliberations.

If your planning group creates subgroups, you’ll need these resource people for each subgroup – plus a designated subgroup leader to manage the subgroup’s work. (Note: Subgroups will not have facilitators, so you’ll need members to act as facilitators and scribes.)

Citizen Ideas

A key resource for the planning groups will be what the citizens said in the vision meetings last fall. More than 1,000 people participated in the 15 meetings; others added their thoughts via the Envision 2030 web site. In all, citizens generated nearly 3,000 ideas about the future of Cumming-Forsyth County. The major themes are summarized in the Common Vision, but it's important for the planning groups to be familiar with the detailed ideas as well.

At the vision meetings, citizens were asked to give their ideas in response to three broad questions:

1. What should Cumming-Forsyth County look like in 2030 and how should it work?
2. Among the things that already exist here, what should we be careful to preserve?
3. For our vision to become reality, what things do we need to create that aren't here now?

Each planning group has been assigned a large set of citizen ideas that seem to connect to its work. The planning groups' citizen idea readers will be given a printout of all these ideas so they can read and report on these ideas. But we encourage all planning group members to read the citizen ideas and ask how they can help with your group's work. You can find all the ideas (organized by planning group) at www.envision2030.com/planning.

Objectives and Outcomes

The objective is for each planning group to come up with a set of recommendations for accomplishing its strategic objectives – in essence, a “community to-do list” for Cumming-Forsyth County related to its assignment.

Specifically, here are the things we're asking the planning groups to do:

- For each strategic objective, list the 3-10 major “action steps” that the planning group feels must or should be taken in order to achieve the initiative.
- If possible, suggest a measurement or set of measurements for judging progress toward achieving the initiative. (“We will know we're making progress by looking at _____.”) Statistical measurements – that is, things that can be counted objectively – are better, but may not always be possible.
- Offer general advice for accomplishing this initiative, such as critical interests that should be involved, approaches that might work, etc.

Other recommendations: The most important work is to make recommendations about accomplishing your assigned strategic objective. But your group may have additional recommendations to make. If so, please include these recommendations as an appendix to your strategic objective work. Note: All recommendations are subject to review and approval by the Envision 2030 Steering Committee.

Outline of the Meetings

We believe most of the planning groups can accomplish their work with an orientation session, on Jan. 27, and four work sessions. Here is an outline of what should happen at these meetings:

Orientation and organization	Jan. 27	<ul style="list-style-type: none"> • Discuss strategic tasks • Decide whether to form subgroups • Assign resource people (citizen idea readers, information gatherers) • Brainstorm about information the group will need; assign to information gatherers
Work Session 1: Gathering and assessing information	Feb. 6	<ul style="list-style-type: none"> • Information gatherers make first report • Brainstorm about additional information that will be needed • Citizen idea readers make their report • Brainstorm about others who should appear before or be members of this planning group
Work Session 2: Framing the ideas	Feb. 20	<ul style="list-style-type: none"> • Information gatherers make second report • Frame possible action steps, including alternative or competing actions • Citizen idea readers critique action steps from citizens' perspective • Brainstorm about final information needed for good decisions
Work Session 3: Deciding on recommendations	March 15	<ul style="list-style-type: none"> • Information gatherers make third report • Assess the possible action steps for strengths and weaknesses • Choose action steps with greatest group support, rewriting some if needed
Work Session 4: Confirming decisions and adding detail	March 29	<ul style="list-style-type: none"> • Review Work Session 3 decisions and make changes, as needed • Assign "ownership" to action steps • Decide how progress should be measured toward the strategic tasks • Consider possible "breakthrough ideas" (projects that would show dramatic progress in this area)

There will be some work between meetings for information gatherers. We would also urge the citizen idea readers to read the citizens' ideas between meetings.

Envision 2030 will take charge of transcribing meeting notes (based on facilitators' notes on the flip charts), posting the notes on the web site at www.envision2030.com/planning, and notifying planning group members when the notes are available for review and comment.

Planning Groups and Assignments

Planning Group 1: Balancing growth with quality of life

1. Show how the Cumming-Forsyth County community can establish quality of life objectives, suggest ways of meeting the objectives (including paying for them) and measure progress.

Givens:

- Quality of life may include, but not be limited to: a thriving economy, a healthy environment, learning opportunities, arts and culture, recreation, human connectedness and community attractiveness.
2. Show how the Cumming-Forsyth County community can balance economic and residential growth as it significantly improves the quality of life of its existing residents.

Givens:

- One way we to do this is with state-of-the-art strategies for managing congestion and improving mobility.
- An innovative county transit system should be developed that uses downtown Cumming as its hub, connects Forsyth's major employment centers and relieves traffic congestion.

Planning Group 2: Creating a community of lifelong learning

3. Show how the Cumming-Forsyth County community can become a community of lifelong learning.

Givens:

- Lifelong learning extends from pre-school to retirement ages.
 - Forsyth County should be regarded as one of the best school systems in the country.
 - Forsyth County should host a superior four-year college that offers post-graduate courses.
4. Show how the Cumming-Forsyth County community can establish arts, cultural and other institutions that help residents explore the world around them.

Planning Group 3: Developing recreation and activities

5. Show how the Cumming-Forsyth County community can develop the best recreational facilities of any county its size.
Givens:
 - The facilities may include, but not be limited to a number of sports facilities and a network of bicycle and pedestrian trails.
6. Show how the Cumming-Forsyth County community can develop year-round events and activities that draw visitors to the area and keep residents involved in community life.

Planning Group 4: Creating employment, protecting the environment, developing downtown Cumming

7. Show how the Cumming-Forsyth County community can become a significant employment center.
Givens:
 - Employers should be drawn to Cumming-Forsyth County by its superior work force.
 - Workers who live elsewhere in the region should be eager to work here.
8. Show how the Cumming-Forsyth County community can become a leader protecting its natural environment.
Givens:
 - The institutions may include, but not be limited to, a Lake Walk, where residents and visitors can learn about Lake Lanier's ecosystem.
 - Sawnee Mountain Preserve should become a community symbol.
9. Show how downtown Cumming can become the heart of the county.
Givens:
 - Downtown Cumming should become a significant employment center.
 - It should become an exciting place to shop and live.
 - It should be the site of numerous events and festivals.



A Common Vision for Cumming-Forsyth County

Revised: 1/5/2007

Vision: Cumming-Forsyth County is a leader at defining and delivering a high quality of life.

Description:

In 2030, Cumming-Forsyth County is recognized as the community that does the best job of **systematically improving the quality of life of its residents and those who work here**. It does this in two ways. First, as a community it regularly reviews its quality of life and sets higher standards that serve as goals. Second, it finds creative ways of meeting these goals, including new means of paying for improvements.

Quality of life is defined broadly in Cumming-Forsyth County. It includes a thriving economy, a healthy environment, learning opportunities, arts and culture, recreation, human connectedness and community attractiveness, among other things.

A key to Cumming-Forsyth County's success is that it has **successfully balanced economic and residential growth and has significantly improved the quality of life of its existing residents**. One way it does this is by using state-of-the-art strategies for managing congestion and improving mobility.

A major element of quality of life is Cumming-Forsyth County's determination to be a community of **lifelong learning**, where children receive the best education in Georgia and adults learn actively into their retirement years. The learning takes place in classrooms – the Forsyth County School System is regarded as one of the best school systems in the country, and Cumming-Forsyth County has a superior four-year college that offers post-graduate courses – but

also in the community itself. Cumming-Forsyth County has a number of **institutions that help residents explore the world around them**, including arts and cultural institutions and a renowned Lake Walk, which allows residents and visitors to learn about the lake's ecosystem.

You can also see Cumming-Forsyth County's high quality of life in its **recreational offerings**. There is an abundance of sports facilities and a network of bicycle and pedestrian trails. Cumming-Forsyth County is regarded as having the best recreational facilities of any county its size.

Among visitors, Cumming-Forsyth County is best known for Sawnee Mountain Preserve, which has become a community symbol. But as visitors learn, there's more to Cumming-Forsyth County than Sawnee Mountain. The community offers a year-round calendar of events and festivals that draws visitors to the area and keeps residents involved in community life.

The county is a significant **employment center**, with employers drawn by the community's superior work force and because workers elsewhere in the region are eager to work in Cumming-Forsyth County. The growth in employment does not come at the expense of the environment, however. On the contrary, Cumming-Forsyth County has emerged as a leader in **protecting its natural environment**.

Downtown Cumming is truly the heart of the county. It is where the governments are located and important community decisions made. It is a significant employment center, as well as an exciting place to shop and live. It is where numerous events and festivals are held. And it is the hub of an **innovative county transit system** that connects Forsyth County's major employment centers and relieves traffic congestion.

The result is that Cumming-Forsyth County is the nation's leader at providing an ever higher quality of life: an attractive, interesting, economically dynamic place that prizes learning and self improvement and welcomes visitors.

Planning Group Co-Chairs And Facilitators Job Description

Each Planning Group will have two co-chairs and an assigned facilitator. The **facilitator's role** will be to take notes on flip charts, ensure all points of view are heard and recorded, make sure that group members participate equally – in general, pay attention to the **process of good group decision-making**.

The **co-chairs' role** will be to make sure the group makes steady progress is toward a **good work product**. So if the facilitators are focused on process, the co-chairs will be focused on work product.

Also, please be aware that, in addition to your assigned facilitator, there will be other facilitators available to help groups that are struggling.

Time commitment

It is important that co-chairs and facilitators attend all Planning Group meetings – plus two additional sessions. (We may also ask you to stay after the scheduled group meetings for a 20-minute “debriefing” session, so we can identify problems that need addressing.)

There are **five Planning Group meetings**: the Jan. 27 Orientation Session (which will also serve as an organizational meeting for your group) plus four Work Sessions. (Assume three hours for the meetings, although the earlier ones may be shorter.)

There are **two meetings just for co-chairs and facilitators**: a Jan. 25 training session and a special mid-process meeting (called a “framing session”) to help the groups draft recommendations. (Assume two hours for these sessions.) The framing session will be March 8. The schedule of meetings, including the two special meetings, are below.

Meeting dates

January 25 Thursday, 4:00 – 5:30pm	Facilitator / Chair Training Chamber of Commerce Events Facility
January 27 Saturday, 9:30am – 11:30am	Planning Groups Orientation Meeting Cumming Elementary School
February 6 Tuesday, 7:00pm – 9:00pm	Planning Groups Work Session 1 Otwell Middle School

February 20 Tuesday, 7:00pm – 9:00pm	Planning Groups Work Session 2 Otwell Middle School
March 8 Thursday, 4:00pm – 5:30pm	Initiatives Framing Session Facilitators / Chairs Chamber of Commerce Events Facility
March 15 Thursday, 7:00pm – 10:00pm	Planning Groups Work Session 3 Otwell Middle School
March 29 Thursday, 7:00pm – 10:00pm	Planning Groups Work Session 4 Otwell Middle School

Envision 2030 Planning Groups
Four-Meeting Model
January-March 2007

Orientation, organization and assigning responsibilities

- Orientation for Planning Group members
- Go to rooms for your Planning Group

Planning Group tasks:

- Discuss the Common Vision in general and your group's strategic objectives in light of your group's major tasks:
 - To make recommendations for achieving the strategic objectives
 - To suggest metrics (i.e., "how will we know if we're accomplishing this initiative?")
 - (Optional) To suggest possible "ownership" or "shared responsibility" for accomplishing the objectives
- Divide into subgroups, if needed.
- Assign two members to be "citizen idea readers" who read the citizen ideas from the fall Vision Meetings and report to the group on the general drift of the ideas and specific ideas that might be helpful to achieving the Group's tasks.
 - *Group decision: How do you want this information to be delivered? In writing, in person or both?*
- Assign two members to be "information gatherers," who will gather information relative to the group's work and report back on it.
 - *Group decision: How do you want this information to be delivered? In writing, in person or both?*
- Brainstorm about information that the gatherers might bring back for the next meeting: "What would I need to know in order to make informed recommendations?"

Work Session 1: Gathering and assessing information

Planning Group tasks:

- Discuss the Common Vision in general and your group’s strategic objectives in light of your group’s major tasks:
 - To make recommendations for achieving the strategic objectives
 - To suggest metrics (i.e., “how will we know if we’re accomplishing this initiative?”)
 - (Optional) To suggest possible “ownership” or “shared responsibility” for accomplishing the objectives
- Either as a single group or in small groups do the following:
 - Information gatherers report (in writing and in person):
 - The facts (not opinions) that, in our opinion, bear the most on these recommendations.
 - What (as well as we can establish) is already being done in these areas that might affect our recommendations? (Include names of organizations and what they’re doing.)
 - *Group brainstorm*: What else do we feel would be needed in order to feel comfortable making recommendations, suggesting metrics and possibly suggesting ownership?
 - Citizen idea readers report (in writing and in person):
 - As best we can tell, here’s what was on the Vision Meeting participants’ minds when they talked about this subject.
 - Here were the most important/most mentioned “things that need to be preserved” that might bear on our recommendations.
 - Here were the most important/most mentioned “things that we need” items that might bear on our recommendations.
 - *Group brainstorm*: In light of what we’ve heard today, who isn’t a part of this group but needs to join it to help us do our work – or should attend the next meeting?

Between meetings: Information gatherers and citizen idea readers should answer questions raised in Work Session 1 in preparation for Work Session 2. If the group has identified others who should join the group, co-chairs will call and/or visit those people and invite them to join.

Work Session 2: Framing the ideas

Planning Group tasks:

- Discuss the Common Vision in general and your group 's strategic objectives in light of your group's major tasks:
 - To make recommendations for achieving the strategic objectives
 - To suggest metrics (i.e., "how will we know if we're accomplishing this initiative?")
 - (Optional) To suggest possible "ownership" or "shared responsibility" for accomplishing the objectives
- Information gatherers report additional information, corrections, etc., and guests/new members who have additional insights or expertise offer factual information and background. Discuss the new information in light of the information that was reported in Work Session 1.
- Frame possible recommendations, including alternative ideas (i.e., competing recommendations).
 - Put all ideas on flip charts
 - Don't aim for consensus at this point
 - After all possible recommendations are written on flip charts, ask if some should be combined or modified, so you have the strongest, best-thought-out alternatives possible.
- Ask the citizen idea readers to discuss the ideas briefly from the citizens' point of view.
 - Are there specific citizen ideas that might fit under one or more of the possible recommendations?
- Final information search:
 - In light of these possible recommendations, what final information would the group need in order to choose the strongest recommendations, establish metrics and possibly suggest ownership?
 - List information suggested by members.
 - Assign information gatherers to bring this information to Work Session 3.

Between meetings: Information gatherers obtain additional information requested by the group. Facilitators and co-chairs review the alternative ideas (as transcribed by Civic Strategies from the flip charts) and make changes so they can be distributed to group members.

Work Session 3: Deciding on recommendations

Planning Group tasks:

- Discuss the Common Vision in general and your group's strategic objectives in light of your group's major tasks:
 - To make recommendations for achieving the strategic objectives
 - To suggest metrics (i.e., "how will we know if we're accomplishing this initiative?")
 - (Optional) To suggest possible "ownership" or "shared responsibility" for accomplishing the objectives
- Information gatherers report final information, as requested in Work Session 2. Discuss the new information in light of the information that was reported in Meetings 1 and 2.
- Review the competing recommendations and discuss strengths and weaknesses, asking the citizen idea readers for the likely citizens' responses to them.
- Ask the group if it would like to combine or rewrite any of the recommendations, in light of new information.
- Dot vote on the alternatives, announce the results and ask if the group would like to combine or rewrite the top-ranked ideas.

Between meetings: Report on the top-ranked ideas, as currently drafted.

Work Session 4: Confirming the decisions, suggesting metrics and ownership, looking for “breakthrough ideas”

Planning Group tasks:

- Review the tentative recommendations from Work Session 3.
- Discuss and come to consensus on possible metrics for judging progress (if we are making progress in this recommendation, we’ll be able to tell by looking at”)
- (Optional) Suggest ownership for each recommendation (or group of recommendations): Look for “natural owners” (i.e., if it concerns K-12 education, then the school system would be a “natural owner” of the recommendation).
- Discuss and come to consensus on what would be no more than three “breakthrough ideas” for your Planning Group area – an initiative or physical addition that:
 - Fits naturally with your overall recommendations.
 - Advances Cumming-Forsyth County in this area in a dramatic fashion.
 - Is something that would rally most people in Cumming-Forsyth County (as suggested by the fall Vision Meeting comments).
 - Preferably is something concrete – that people can reach out and touch.

Examples of breakthrough ideas from other places:

- *Build the world’s largest aquarium in downtown Atlanta*
 - *Build a regional multi-modal transportation system in Greenville, SC*
 - *Bring a minor-league baseball team to Rome, GA*
- **Celebrate!**

Need help understanding these process suggestions?

Call Otis White, Civic Strategies, Inc.

404-873-5343 (office)

678-592-4590 (cell)

Or e-mail him at otwhite@civic-strategies.com.

Work Session Easel Templates and the Final Product

Early Idea List
<p>(Use this list during the first two sessions to capture action steps that might emerge. This will allow the group to move things to the side for later consideration while the group works on the main agenda for the meetings. It also ensures that the idea is not lost.)</p>

Information List
<p>(Consider a side list to collect information that the group needs to find before the next meetings.)</p>

Action Steps	Key Ideas
<p>(Use to collect action steps in meetings 3 and 4.)</p>	<ul style="list-style-type: none"> ○ List key ideas that go with the action steps.)

When to use: This exercise could be used, as a quick way to sort ideas and prioritize action steps in Work Session 4.

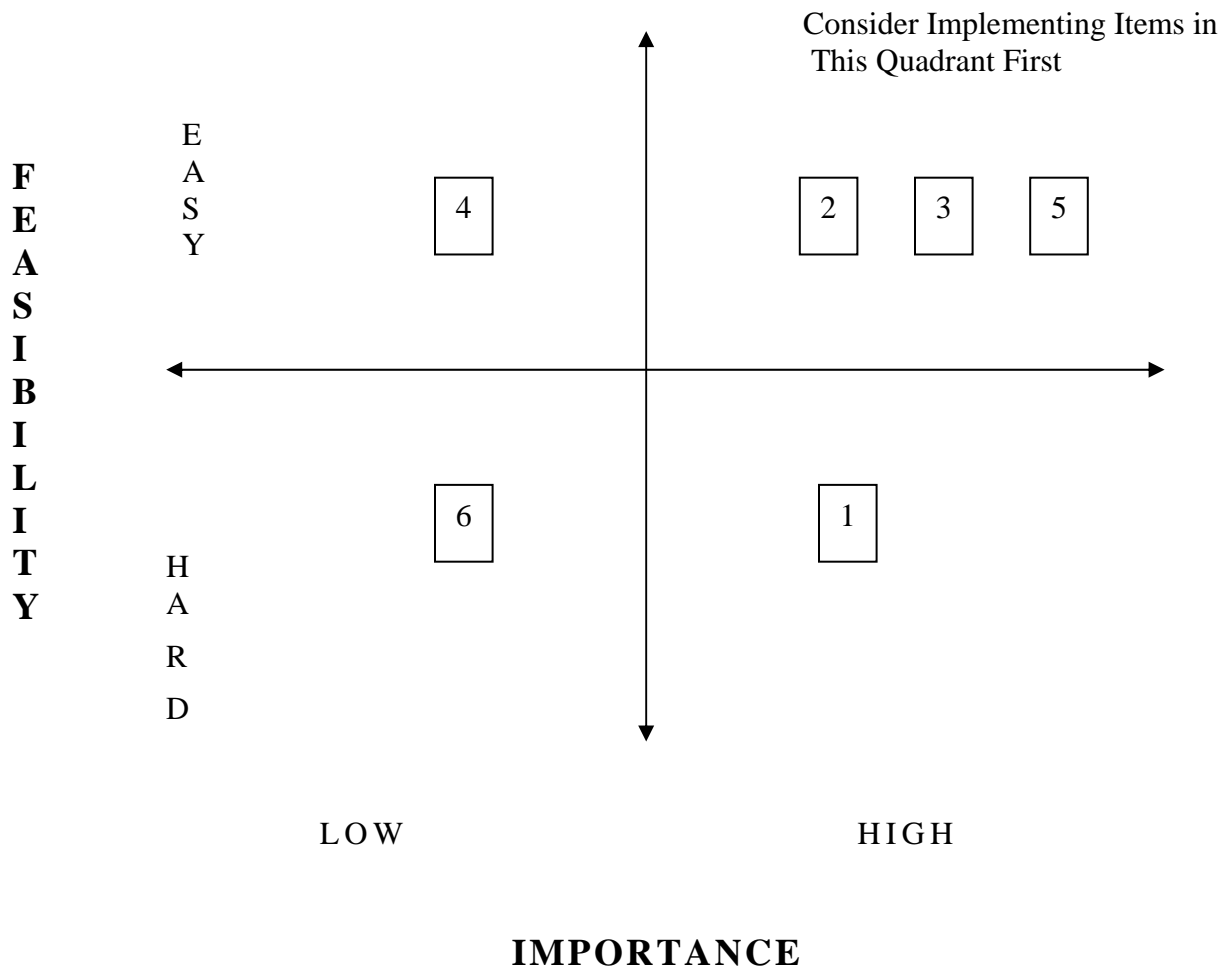
Prioritizing Action Ideas: Verbal instructions

1. On a flip chart or blackboard, draw a horizontal line and a vertical line, resulting in a cross with 4 quadrants. On the left side, running vertically top to bottom, write the word “Feasibility.” Across the bottom, running left to right, write the word “Importance.”
2. Label the top 2 quadrants above the horizontal line “Easy”. Label the bottom 2 quadrants below the horizontal line “Hard.”
3. Take the list of action ideas, and assign them to the appropriate quadrant.
4. Ideas in the upper right quadrant (which are both “Easy” and “Important”) might be a good place to begin.

Key Observations:

- Easy and important items are “low hanging fruit” or quick victories to build momentum.
- Hard and important may be the most important but could require special attention and strong partners.
- An item could be labeled high importance if it has an impact on a broad number of people or if it has a long-term, positive and significant impact on the community.

Prioritizing Action Ideas



Action Ideas for Improving Involvement of non-English Speaking Parents

1. Organize ESL classes for parents.
2. Translate school documents into other languages.
3. Provide translators for parent conferences.
4. Hold "Family Night" for families (e.g. pizza, bingo, resources, and translators)
5. Survey parents on their needs.
6. Provide free English language learning videos to families.