

**PRACTICAL TECHNIQUES AND TOOLS  
FOR ENGAGING THE COMMUNITY  
IN DESIGNING THEIR FUTURE**

**Notes for Facilitators**

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## **Seven Pillars of A Healthy Community**

- Practices ongoing dialogue
- Generates leadership
- Shapes its future
- Embraces diversity
- Knows itself
- Connects people and resources
- Creates a sense of community

(Healthy Cities and Communities Coalition)

## A. INTRODUCTION

These notes seek to provide a summary of the variety of techniques and tools available to facilitators to engage community residents in participatory processes that enable the design of their preferred future(s). Fundamentally such processes attempt to answer some key and simple questions like:

- Who are we?
- What have we got?
- What do we want?
- How do we get it?

Such processes often involve community residents in:

- information discovery and exchange;
- asset, issue and opportunity identification, and
- consensus negotiation and prioritisation of possible options, strategies and actions.

There is a wide range of methods and tools that can be employed - each has its value and limitations. Selection and combination needs to depend on specific purpose(s) for community engagement, extent of financial and technical resources for the exercise and available timeframe. Obviously a combination of methodologies enriches the community engagement process.

Community engagement is not a public relations exercise - it is not about a group or institution deciding what to do and then trying to convince community residents that it is the best option. Community engagement must be an interactive process involving communication, information sharing and decision making.

Finally, there are two fundamental principles for effective community engagement, namely:

- maximisation of community involvement, interaction and ownership of the process and its outcomes, and
- recognition of the diversity of values, ideas, capacities and opinions that exist within any community.

*'The best way to predict the future is to create it'*  
(Peter Drucker)

## B. KEY CONCEPTS

### I. Community Engagement

*Facilitating full understanding by community residents of what is happening in their community, soliciting their opinions and ideas, mobilising their active participation and promoting recognition of the choices they have in achieving the future community they desire.*

(Bank of IDEAS)

### II. Facilitation

*'To make easy, promote, help forward an action or result, to remove difficulty, promote ease or readiness with aptitude, dexterity or fluency'*

(Dictionary definition)

#### Key roles

- Create an atmosphere of energy, excitement and optimism
- Demystify concepts, processes and strategies
- Optimise the knowledge and expertise of participating groups/individuals
- Broker experiences, models, methodologies, networks and resources that may be relevant.
- Encourage collaborative efforts between relevant groups and networks

### III. Community Consultation

*'Consultation is about involving the public in decision making in a structured and rigorous way. Information is exchanged, concerns and issues identified and responded to, and in many cases positions and consensus negotiated'.*

(Sheridan Coakes, Bureau of Regional Sciences)

## **C. COMMUNITY ENGAGEMENT METHODOLOGIES**

### **I. PERSONAL CONTACT/ONE TO ONE INTERVIEWS**

Simply about holding a discussion with individuals who have a stake or interest in the issue/project. Discussions can occur in people's homes, work place, project office or community meeting location, eg, local coffee shop. Example of use is a door knock visitation initiative to businesses in the main street regarding main street enhancement.

#### **Strengths:**

- people feel valued and listened to
- allows for a two way exchange of information
- direct information gathering
- opportunity for honest conversation that can build trust

#### **Limitations:**

- time consuming
- individuals may be left out - difficult to involve all interested people
- no opportunity for community consensus on particular issues or options
- some people feel uncomfortable with individual contact
- one to one contact may be culturally inappropriate for some ethnic groups

#### **Operational principles:**

- make it easy to consult - it is preferable to go to peoples' venues
- attempt to identify and involve all key stakeholders
- use appropriate meeting space
- give people time to organise to participate and think about the relevant issues
- be organised - prepare appropriate introductions and questions
- maybe link with a questionnaire that can be left and picked up/returned later
- at conclusion, always thank people for their participation, indicate what will happen with the information and other opportunities to contribute ideas and opinions.

### **II. SURVEYS**

This method is '*designed to deal directly with the nature of peoples' thoughts, opinions and feelings*' (Coakes:21). A variety of information can be collected through using face to face interviews (see structured interviews below), telephone interviews, mail out or drop and pick up methods. Attached as appendices 1, 2, 3 and 4 are copies of a

Community Assessment Survey, A Community Survey, a Consumer Survey and a Business Survey, utilised in the Community Builder Program.

**Strengths:**

- can gather opinions of a large number of people, thus ensuring a representative view
- provides a data base
- useful to supplement other methods, eg, focus groups, personal contact etc

**Limitations:**

- can be expensive
- possibility of low response rate (especially if using a mail/drop off return system)
- does not provide two way communication
- effective question construction is a skill and often requires professional assistance
- collation and interpretation can be time consuming

**Operational principles:**

- have a clear purpose and decide on the end use of results before starting
- be diligent about survey methodology and question construction (perhaps seek professional assistance in designing survey)
- include description of project initiative in a preface or covering note
- avoid ambiguous questions – pre test survey
- vary question types - include open ended questions
- ensure questions are in a logical sequence
- avoid using jargon and technical language
- keep survey as brief as possible
- try to ensure survey goes to all interested stakeholders
- develop a software package to capture results
- avoid collecting data already available elsewhere, eg, census data

### III. STRUCTURED VISITATION INTERVIEWS

This involves the preparation of a questionnaire which trained volunteers administer in pairs - one asking the questions, the other noting answers. Volunteers are trained to use the questionnaire as a means of creating a dialogue with the interviewees, thus often asking for elaboration on responses. This technique has been made popular in Australia through the Business Retention and Expansion Program (BR+E). See Appendices 6 and 7 for a summary of the BR+E Program and a typical questionnaire.

**Strengths:**

- provides indepth responses
- prerequisite volunteer training

- mobilisation of community volunteers, and their subsequent involvement and skill development

### **Limitations:**

- time consuming, eg, within the Business Retention and Expansion Program each interview usually requires one and a half hours
- requires a large number of volunteers, eg, within the Business Expansion and Retention Program, two volunteers usually can handle between 4 and 6 interviews.

### **Operational principles:**

- vital that community interviewers are trained in the process, including opportunity for role play situations
- attention is needed in question construction
- limit questionnaire to less than 40 question items
- important that both interviewees and interviewers receive feedback about results and outcomes of exercise
- the high time commitment by volunteers requires acknowledgement, eg, thank you occasion, recognition certificate
- volunteers need to be covered for out of pocket expenses and volunteer insurance
- provide an opportunity for volunteers to reflect on the interview experience immediately after each event (see Appendix 8 for an example of form used in the BR\_E process) and collectively as a group after completion of surveys

## **IV. FOCUS GROUPS**

A focus group is a structured discussion based interview situation. Focus groups are used to gather information that is needed on a particular topic/issue. A facilitator conducts a 'group interview' gaining a comprehensive range of views from a small group of people (usually no more than twelve persons). A focus group may focus on gaining opinions and views and/or generating ideas.

### **Strengths:**

- indepth focus on a specific issue
- flexibility
- brings out subtle variations in views
- group environment may generate different dynamics and other issues and topics to a one to one interview situation
- provides opportunity to observe participant interaction
- less time consuming than individual interviews
- excellent for generating lateral thinking

### **Limitations:**

- limited participation
- potential for participant(s) to dominate
- personal power and group dynamics may influence opinions expressed
- requires skilled facilitator
- participants may not represent majority community feeling or variety of opinions in a community

### **Operational Principles**

- use skilled facilitator
- important to feedback to participants
- always combine with other methodologies

## **V. DISPLAYS**

Involves the provision of information on a particular development, initiative and/or issue(s). While displays need to be set up where there is a high volume of community pedestrian traffic, eg, shopping centres, window display of a prominent building, local library, they may be more successful if combined with open days and/or shop front.

### **Strengths:**

- relatively low staff cost
- enables visual displays
- reaches large number of people
- reaches people who may not participate in public forums

### **Limitations:**

- focuses on information dissemination rather than information exchange
- many be expensive to prepare display
- issues cannot be explored

### **Operational principles:**

- choose a high pedestrian traffic area
- give attention to quality and best practice merchandising principles
- use visuals, photographs, maps etc
- update display regularly
- provide contact details
- provide take away information

- preferably staff the display with someone who can interact with the public
- refer to other community engagement activities

## VI. INFORMATION SESSIONS/DAYS/OPEN HOUSES/OPEN DAYS

Involves the provision at a central location of displays, printed information and most important people to answer questions or discuss issues. Such sessions are held at times and locations convenient to community residents.

### **Strengths:**

- provides an opportunity for informal discussion at residents convenience
- provides opportunity to correct misinformation
- allows opportunity for indepth discussion
- allows direct contact with interested stakeholders
- allows participants to stay as long or short a time as they wish

### **Limitations:**

- primarily information giving, rather than receiving
- expensive to create attractive displays
- success relies on staff knowledge and communication skills
- may only attracted a limited cross section of the community

### **Operational principles:**

- requires extensive advertising
- requires staff with excellent knowledge and strong communication skills
- must be held at convenient times and locations
- issues raised need recording
- provide take away material
- combine with a feedback form
- provide refreshments
- collect contact details to forward future information

## VII. TELEPHONE ACCESS/INFORMATION HOTLINES

Use of the telephone to provide and/or solicit information on a particular issue/initiative/concern. Service is personally manned or through the use of an answering service. May involve provision of a 1800 number. All information is recorded and analysed.

**Strengths:**

- easy access for the community
- cost effective

**Limitations:**

- affords limited interaction
- success depends on recording and good follow-up and feedback procedures
- does not generally allow complex issues to be addressed

**Operational principles:**

- focus on maximising user friendly nature
- if personally manned use staff with good knowledge and strong customer service skills
- ensure good recording, follow up and feedback procedures

**VIII. PRINTED INFORMATION**

Involves the provision of brochure(s) and/or regular newsletter. Such information needs to inform, excite, encourage interest and solicit response.

**Strengths:**

- provides profile to exercise/initiative (especially during times of low activity)
- can inform large numbers of people
- allows people to absorb information at their convenience
- can reduce misinformation
- can be used with a variety of other methodologies
- newsletter can give regular updates, and create a sense of positive movement

**Limitations:**

- potential misinterpretation
- does not enable direct feedback
- cost
- can only provide basic information
- no interaction
- can be viewed as a 'selling' job

**Operational principles:**

- give attention to quality, layout and appeal - must excite

- provide contact details and encourage feedback
- give attention to language - avoid jargon
- use visuals
- avoid glossy publications

## **IX. PUBLIC MEETINGS/FORUMS**

Represent an open gathering to present information and exchange views. The format usually involves presentations followed by discussion and questions.

### **Strengths:**

- opportunity to present information to a large number of people
- relative low cost
- non confrontational to listeners
- a traditional and familiar method of engagement

### **Limitations:**

- large audiences limit quality of interaction and idea/opinion exchange
- onus is on community residents to attend
- does not ensure all views are held - dominate vocal minority views can dominate
- difficult to use for complex and contentious issues
- opportunity to degenerate into emotional slanging matches
- success of meeting may be judged purely by the size of the turnout
- can raise expectations

### **Operational principles:**

- need for creative and extensive advertising
- use strong chairperson
- record issues/suggestions publicly, eg, on butchers' paper
- agree on the rules of meeting conduct prior to commencement
- ensure focus on issues not personalities
- provide opportunities for informal discussions, eg, refreshments

(see appendix 9 for I.D.E.A.S. handout on Effective Public Meetings)

## **X. COMMUNITY GROUP PRESENTATIONS**

Addresses to community groups may be a very useful technique to disseminate information and solicit feedback on a particular project/initiative/issue. Service clubs in particular, are always interested in speakers with relevant topics.

### **Strengths:**

- groups with an identifiable interest and relevance can be targeted and reached
- relatively easy to organise
- cost effective
- potential to establish new working relationships and allies
- potential to be interactive

### **Limitations:**

- only reaches particular sections of the community
- requires a presenter with effective public speaking abilities
- time consuming

### **Operational Principles:**

- target groups with relevance to project/issue/initiative
- approach groups - do not wait to be asked
- fit in with the group's regular meeting times
- tailor presentation to group and its background
- effective use of public speakers
- keep the presentation as informal as possible
- encourage participants to pass on the information to others in the community
- leave printed information

## **XI. WORKSHOPS**

Workshops are designed to generate a 'group' product, eg, lists of issues, range of options or a mutually accepted plan of action. It is a useful method to bring together stakeholders with different values. A workshop is best used when there is a specific focus and a need to generate solutions. See Appendix 10 for the I.D.E.A.S. handout on the Community Opportunity Workshop - a format used to generate and prioritise actions to achieve a community's preferred future.

There are a number of participatory group techniques that can be used in the workshop process including:

- brainstorming
- nominal groups
- sub groups
- Delphi technique
- Force Field analysis
- Value mapping
- Values clarification

Information sheets on these techniques are available.

**Strengths:**

- maximum interchange of information and ideas
- enables prioritisation of action
- enables the creation of a 'group' product

**Limitations:**

- needs skilled facilitation
- can be time consuming
- limited number for effectiveness (12-25 people is an ideal range)
- can generate unreal expectations

**Operational principles:**

- use a skilled and motivating facilitator
- hold additional workshops to meet demand rather than restrict participation
- avoid formality
- create a comfortable environment - pleasant setting, comfortable seating, provision of refreshments, etc
- hold at convenient time for participants
- use ground rules

**XII. COMMUNITY ASSET MAPPING**

- A systematic process for identifying and detailing resources (individual skills and organisational resources) and strengths in a community.
- Focuses on identifying and using the assets and strengths in the community rather than emphasising the problems and deficits.
- Inherently optimistic and rests on the assumption that everyone has a gift to give.
- Mapped assets are connected and mobilised for action.

**Strengths:**

- a strong community building initiative
- identifies the community's individual and organisational skills and capacities
- identifies community connections

- connects resources to community initiatives
- mobilises residents to address critical community issues
- strengthens belief in building community from inside out
- builds bridges between groups

**Limitations:**

- time consuming
- needs a facilitator skilled in asset mapping techniques

**Operational principles:**

- use an asset mapping focused facilitator
- use a variety of audit forms (see Appendix 11 for an example of community skills audit)

### XIII. MEDIA INITIATIVES

This involves the use of media through either paid advertising or use of editorial and interviews. Advertising can be used for information dissemination and/or solicitation of feedback through a clip out coupon. Securing free media is either via news release distribution or securing interview opportunities (print, radio or television).

**Strengths:**

- can reach a broad audience
- relatively low cost
- media coverage always provokes interest
- can be used to motivate participation

**Limitations:**

- potential for misinformation.
- no interaction
- needs to be newsworthy

**Operational principles:**

See Appendix 12 for '*Tips for Working with the Media*' (IDEAS information sheet)

#### **XIV. COMMUNITY LIAISON GROUPS/CONSULTATIVE COMMITTEE/COMMUNITY THINK TANKS**

Such groups comprise local people representing various interests, points of view, background experiences and expenditure. Groups are usually formed with a specific purpose and mandate. Ideally groups should be less than 12 people and meet regularly.

##### **Strengths:**

- allows two way exchange
- builds community commitment and ownership
- enhances profile
- builds community capacity
- highly visible form of participation

##### **Limitations:**

- usually just advisory - lacks decision making ability - this can frustrate participants
- may not be representative of all interests
- information may not be passed on to broader community
- success depends of goodwill of all participants
- potential of participant 'burn out'
- frustration can occur if advice not acted upon

##### **Operational principles:**

- attention to membership selection - must have credibility
- participation should have a predetermined lifeline
- use consensus decision making
- recognise and reward participation
- needs skilled chairperson

#### **XV. APPRECIATIVE INQUIRY**

Appreciative inquiry is a positive focussed operation to change that can be used by individuals, teams, organizations and communities, through an interview process that focuses on strength and high-point experiences. appreciative inquiry helps participants discover and create a desired future based on identified strength by looking for strengths to enhance instead of problems to be solved, appreciative inquiry generates hope, optimism and energy – powerful forces for change. appreciative inquiry is simply about the cooperative search for the best in people.

## Appendix 1

### COMMUNITY ASSESSMENT SURVEY

Community: \_\_\_\_\_

Date: \_\_\_\_\_

1. What is your perception of the attitude in your community concerning its future?

- |                                      |                                       |   |
|--------------------------------------|---------------------------------------|---|
| <input type="checkbox"/> progressive | <input type="checkbox"/> conservative | <input type="checkbox"/> middle of the road |
| <input type="checkbox"/> positive    | <input type="checkbox"/> negative     | <input type="checkbox"/> other              |

Comment:

2. How do you perceive the economic status of your community?

- |                                  |                                    |                                 |
|----------------------------------|------------------------------------|---------------------------------|
| <input type="checkbox"/> growing | <input type="checkbox"/> declining | <input type="checkbox"/> stable |
|----------------------------------|------------------------------------|---------------------------------|

3. What are your community's strengths? List the top five, in order of priority.

1.

2.

3.

4.

5.

4. What do you consider to be the best two advantages of living in your community?

1.

2.

5. What do you consider to be the five main limitations in your community, in order of severity?

1.

2.

3.

4.

5.

6. What do you estimate as the make up of your community's economic base (wealth creation)? List by percentage of 100%.

Agriculture \_\_\_\_\_ %

Industry/manufacturing \_\_\_\_\_ %

Retail \_\_\_\_\_ %

Tourism \_\_\_\_\_ %

Government \_\_\_\_\_ %

Service \_\_\_\_\_ %

Other \_\_\_\_\_ %

7. What do you estimate as the employment make up of your community? List by percentage of 100%

Agriculture \_\_\_\_\_ %

Industry/manufacturing \_\_\_\_\_ %

Retail \_\_\_\_\_ %

Tourism \_\_\_\_\_ %

Government \_\_\_\_\_ %

Service \_\_\_\_\_ %

Other \_\_\_\_\_ %

8. Do you feel your local council is supportive and proactive in terms of economic development?

Yes

No

Comment:

9. Does your community have a focus and organisation for local economic development?

Yes

No

Comment:

10. What businesses/industries has your community lost in the last three years?

11. What major community improvements have been completed in the last 3 years?

12. What do you feel is needed to stimulate your community economy?

more attractive main street

more jobs

better industrial area

improved organization and coordination for economic development

more businesses

better infrastructure

better housing

other

13. Does your community have an action plan for the future?

Yes

No

Comment:

14. Do you feel that local residents are involved in local economic development activities and local decision making?

Yes

No

Comment:

15. Do you feel you are involved in local decision making? In what way, or why not?

16. Do local development groups (council, service clubs, tourism association, Development association etc) plan together and cooperate in terms of future development?

Comment:

17. Does your community and neighbouring communities collaborate together to achieve a positive economic future, or see each other as rivals?

Comment:

18. Finally, what changes would you like to see in your community/region in the next three years?

## Appendix 2

### Community Survey

By completing this survey, we will have a better understanding of what our community would like to see improved. Remember your name will not be required, so feel free to tell us how you feel about your town. Please complete the survey by circling the appropriate number or by adding comments to the blank lines.

	Excellent	Good	Not Sure	Poor	Very Poor
What is your visual impression of our community? Suggestion for improvement	1	2	3	4	5

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What do you think of our community's sporting facilities? What other recreation facilities and activities would you like to see?	1	2	3	4	5
--	---	---	---	---	---

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How do you rate our community's employment opportunities? Suggestion for improvement	1	2	3	4	5
--	---	---	---	---	---

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What do you think of the education opportunities for our children and young people? Suggestions	1	2	3	4	5
---	---	---	---	---	---

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	Excellent	Good	Not Sure	Poor	Very Poor
What do you think of our Adult Education opportunities? Suggestions	1	2	3	4	5

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How would you rate our community's health facilities? Suggestion for improvement	1	2	3	4	5
---	---	---	---	---	---

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What do you think of the range of services offered in our town? 5 Suggestion for other services you believe are missing		1	2	3	4
---	--	---	---	---	---

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How would you rate your quality of life in this community?	1	2	3	4	5
--	---	---	---	---	---

What do you like about living in our community?  
 What don't you like about living in our community?

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Which age bracket are you in?	13-19	20-29	30-39	40-49
	50-59	60-69	70+	

What is your gender?	Female	Male
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Appendix 3

**CONSUMER SURVEY**

We eagerly await your opinions. If you cannot fill this survey in immediately, please return it to: \_\_\_\_\_ by \_\_\_\_\_

1. Do you do most of your shopping locally? Yes  No

NB: 'Yes' means that you visit local businesses regularly and spend at least \$100 p/wk. If No, can you give your reason(s) for shopping elsewhere?

.....

2. Are you happy with the variety of shops and services in this area? Yes  No

3. Do you live in this area? Yes  No

If No, where do you live? .....

4. For each of the following items can you tick up to four reasons that influence you when you buy:

**Most shopping items**

**Groceries**

**Meat**

Price

Price

Price

Range/variety

Range/variety

Range/variety

Quality

Quality

Quality

Shopping hours

Shopping Hours

Shopping hours

Parking

Parking

Parking

Transport

Transport

Transport

Attitude of Staff

Attitude of Staff

Attitude of Staff

Speed of Service

Speed of Service

Speed of Service

Atmosphere

Atmosphere

Atmosphere

Convenience

Convenience

Convenience

<b>Clothing</b>	<b>Hardware</b>	<b>Appliances</b>
Price <input type="checkbox"/>	Price <input type="checkbox"/>	Price <input type="checkbox"/>
Range/variety <input type="checkbox"/>	Range/variety <input type="checkbox"/>	Range/variety <input type="checkbox"/>
Quality <input type="checkbox"/>	Quality <input type="checkbox"/>	Quality <input type="checkbox"/>
Shopping hours <input type="checkbox"/>	Shopping hours <input type="checkbox"/>	Shopping hours <input type="checkbox"/>
Parking <input type="checkbox"/>	Parking <input type="checkbox"/>	Parking <input type="checkbox"/>
Transport <input type="checkbox"/>	Transport <input type="checkbox"/>	Transport <input type="checkbox"/>
Attitude of Staff <input type="checkbox"/>	Attitude of Staff <input type="checkbox"/>	Attitude of Staff <input type="checkbox"/>
Speed of Service <input type="checkbox"/>	Speed of Service <input type="checkbox"/>	Speed of Service <input type="checkbox"/>
Atmosphere <input type="checkbox"/>	Atmosphere <input type="checkbox"/>	Atmosphere <input type="checkbox"/>
Convenience <input type="checkbox"/>	Convenience <input type="checkbox"/>	Convenience <input type="checkbox"/>

If you do not buy these items locally, in which town or shopping centre(s) do you buy them?

.....

5. From your own experience how would you rate staff in local shops in terms of the following:

<b>Helpfulness</b>	<b>Product knowledge</b>	<b>Friendliness</b>
Extremely good <input type="checkbox"/>	Extremely good <input type="checkbox"/>	Extremely good <input type="checkbox"/>
Good <input type="checkbox"/>	Good <input type="checkbox"/>	Good <input type="checkbox"/>
OK <input type="checkbox"/>	OK <input type="checkbox"/>	OK <input type="checkbox"/>
Bad <input type="checkbox"/>	Bad <input type="checkbox"/>	Bad <input type="checkbox"/>
Extremely bad <input type="checkbox"/>	Extremely bad <input type="checkbox"/>	Extremely bad <input type="checkbox"/>
Comments	Comments	Comments

6. What changes should local shops make to get more of your business? (choose up to 5 changes from the list)

- |                          |                          |                         |                          |
|--------------------------|--------------------------|-------------------------|--------------------------|
| More competitive pricing | <input type="checkbox"/> | More variety            | <input type="checkbox"/> |
| Better quality goods     | <input type="checkbox"/> | Longer opening hours    | <input type="checkbox"/> |
| Better parking           | <input type="checkbox"/> | Better customer service | <input type="checkbox"/> |
| Day/weekend parking      | <input type="checkbox"/> | More special events     | <input type="checkbox"/> |
| More advertising         | <input type="checkbox"/> | Any other suggestions:  |                          |

.....  
.....

7. Are there any existing shops or services in this area that you would use more if some things were changed?

- Yes  No

If "yes", what would you change and why? .....

.....

8. Are there any businesses or services which you believe are missing in this area: If so, which?

.....  
.....

9. Are there any final comments you would like to make about services or businesses in this area:

.....  
.....

Thank you for your cooperation



7. What do you think are the advantages of running a business in this area? (Please tick up to five (5) reasons)

- |                                     |                          |   |                          |
|-------------------------------------|--------------------------|---|--------------------------|
| close to key industries             | <input type="checkbox"/> | reliable transport and freight services | <input type="checkbox"/> |
| local customer loyalty              | <input type="checkbox"/> | reliable business & other services      | <input type="checkbox"/> |
| the quality of life the area offers | <input type="checkbox"/> | quality and supply of local labour      | <input type="checkbox"/> |
| housing available for employees     | <input type="checkbox"/> |   |                          |
| other(s) please specify .....       |                          |   |                          |

8. What do you think are the disadvantages of operating a business in this area? (please tick up to 5 reasons)

- |                                  |                          |   |                          |
|----------------------------------|--------------------------|---|--------------------------|
| time/distance from other markets | <input type="checkbox"/> | shortage of skilled labour              | <input type="checkbox"/> |
| time/distance from suppliers     | <input type="checkbox"/> | narrow range of local business services | <input type="checkbox"/> |
| transport costs                  | <input type="checkbox"/> | poor service of local business          | <input type="checkbox"/> |
| communication costs              | <input type="checkbox"/> | slow growth of local market             | <input type="checkbox"/> |
| small size of local market       | <input type="checkbox"/> | lack of suitable housing for employees  | <input type="checkbox"/> |
| lack of local support            | <input type="checkbox"/> | other(s) please specify .....           |                          |
| .....                            |                          |   |                          |

9. Which (specific) products or services purchased by your business from outside the local area do you think could be manufactured or produced locally?

.....

10. Are there any services or products which you have considered providing or manufacturing locally but did not proceed with the idea?

Yes  No

If yes, what services or products and what were your reasons for not proceeding?

.....

11. Are there any products or services which you find difficult to obtain locally?

Yes  No

If yes, please specify.

.....

12. Are there any industries/businesses/services which you think could be successfully located in this area?

.....

13. What particular actions do you believe could be undertaken at the local level by government, local council or business organisations to assist businesses developing in the community?

.....

.....

14. Finally, do you have any other ideas or suggestions about improving business activity within the community?

.....

.....

.....

**Thank you for your cooperation**

## Appendix 5

### **TIPS FOR QUICK COMMUNITY SURVEYS**

Surveys give a 'snapshot' of the current situation in a community and are useful for deciding on what a project might aim to change and what targets could be set. They can also show to what extent existing initiatives are achieving their objectives or need to be changed in any way.

#### **Typical uses for surveys:**

- Identify specific community or business needs;
- Measure community or business attitudes;
- Identify gaps which a potential business could fill in the market place;
- Measure whether a project or venture is likely to be needed or wanted;
- Identify poor ideas as well as good ones;
- Measure the progress or success of an initiative (eg, how many people were employed before or after the initiative, how many shops were empty before or after, what were the attitudes of people before or after, how many people/customers/visitors came to a particular place before or after and so on)'
- Create publicity or community interest in a new venture or idea.

#### **Examples of the types of information that can be collected in surveys:**

- Infrastructure or housing needs;
- Visitor numbers;
- Business needs;
- Consumer needs;
- Local spending patterns;
- Local attitudes;
- Under utilized resources

#### **Some things to remember before beginning a survey:**

- Have a clear purpose and decide on the end use before starting.
- Where possible, involve people in the community who may know something about how surveys are conducted (eg, marketing professionals, local council staff or students) or consult community support organisations.

- Before deciding to hire consultants or research institutions give thought to what the survey is really aimed at achieving. Often groups can do their own small surveys without spending huge amounts of money on consultants and should look hard at what they can do for themselves.
- If it is decided to use professionals, it is important to interview more than one potential consultant.
- Groups which decide to do their own surveys often get bogged down in processing the information - work out how the information will be used and processed before beginning.
- Keep it simple - two or three small surveys may give better results than a large complex one.
- Work out the resources needed to undertake the survey - people, money, time, and data processing. Often local high schools, Telecentres and universities are prepared to use a survey as a learning opportunity for students or trainees.
- Decide which is the most appropriate way of conducting the survey - face to face, through the mail, distributing questionnaires ("knock and drop"), by telephone etc. Take into account whose opinions or ideas you are trying to survey.
- Test the survey questions beforehand to make sure they are not ambiguous and can be understood easily by the people being surveyed. Ensure that the answers they invite really give the information required.
- Keep the number of questions to a minimum.
- Ensure the introduction or covering note encourages people to take part by showing the benefits to them or the community as a whole. Consider whether to brief people or publicise the survey before starting so that any concerns they have can be addressed. Be careful to do this in a way that it does not affect the results!

### **After the survey**

Let people know the key findings as soon as possible. Surveys can raise community interest in an idea or possible initiative, but the benefits are soon lost if results are not published or it takes a long time to process them.

## Appendix 6

### **BUSINESS RETENTION AND EXPANSION VISITATION PROGRAM**

The Business Retention and Expansions (BR+E) Visitation Program represents a community response to the fact that 70% plus of job creation emanates from existing business growth. A BR+E Visitation Program allows a community to demonstrate pro-business support for existing local businesses through a systematic and regular business visitation program.

The BR+E Visitation Program utilises a structured interview process that allows the discovery of:

- Local business needs and concerns
- Perceptions by local businesses that prevent expansion
- Any business considering relocation outside the community and why
- Perceptions about local government actions – what helps and hinders
- Opportunities for match making local businesses
- Current and future labour and market needs
- Good ideas people have for improving the local economy and the business environment

The BR+E Visitation Program is flexible and can be administered in a number of ways. Depending of the needs and size of a community, the following are possible.

- A regular systematic monthly visitation of all local businesses
- A one off visitation to a sample of local businesses
- A systematic visitation program that would include all local businesses over a period of time.

The structure of the program involves the following:

- Formation of a local community BR+E task force
- Recruitment and training of local interview volunteers
- Visitation of local businesses to assess needs, concerns and opportunities
- Review of the results of the businesses surveys by local task force, resulting in:
  - referral of immediate requests for assistance
  - identification of 'red flag' issues requiring response and action, including acting in 'ombudsperson' role to investigate and try to resolve concerns and complaints
  - formulation of a report on outcomes
  - feedback to the wider community through the media and public/business meeting(s) about outcomes

The benefits of the BR+E program to the local business community includes:

- Knowledge that their community and local government values their presence, and is interested in the needs and concerns
- Opportunity to air complaints about any aspect of the local environment
- Referral to appropriate sources of information, advice and support programs
- Input into future local economic development decision making and action
- Opportunity for local business matching

A procedural manual, various interview forms for different businesses types, training and analysis support is available from the IDEAS Group.

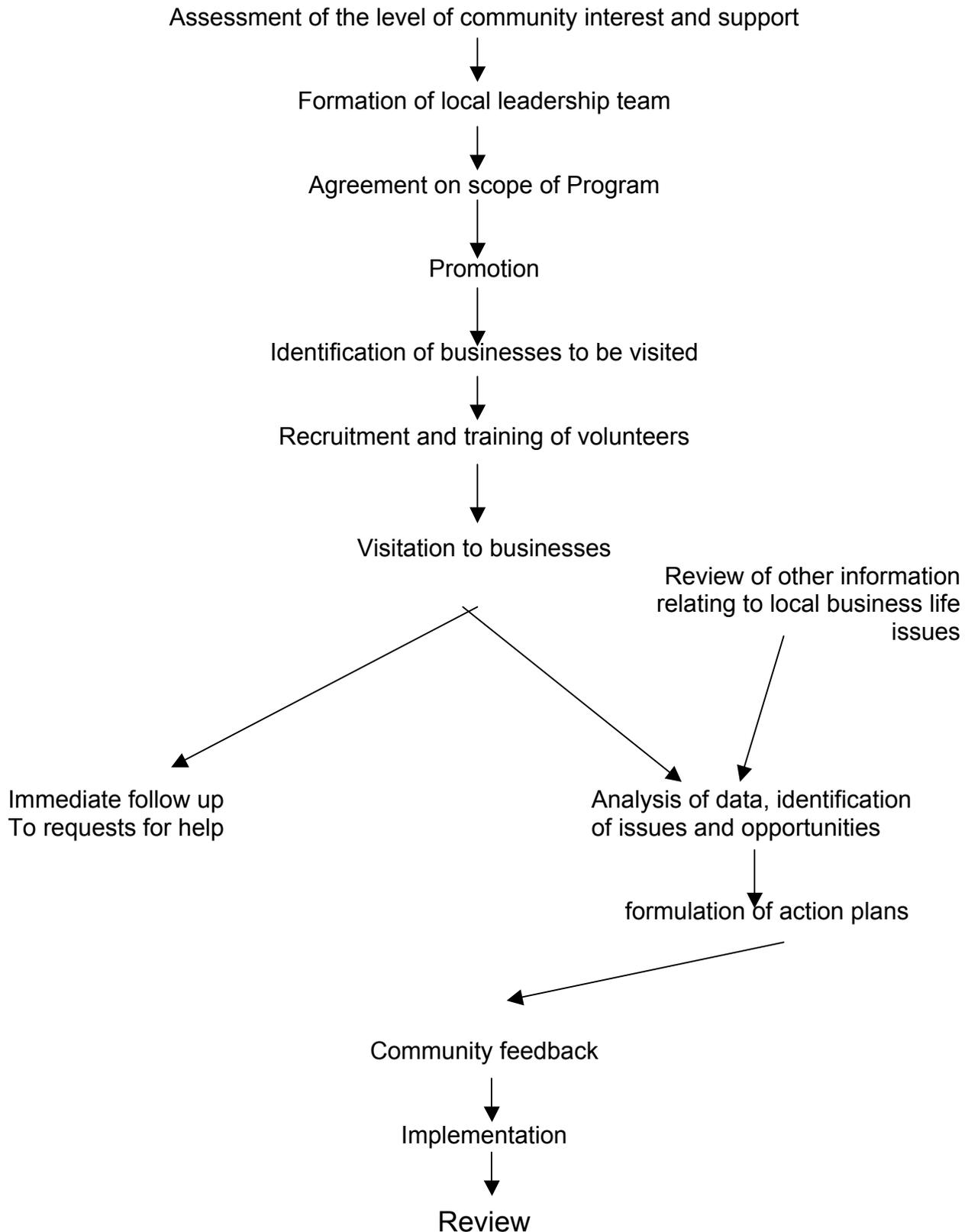
The Business Retention and Expansion Visitation Program is a regular feature of many North American communities. An Australian model version is currently being developed and trialed. In July 1998, a nationally accredited training program for program Facilitators was conducted in most state capitals.

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## Flow diagram of BR+E Program



## Appendix 7

### THE SURVEY QUESTIONNAIRE

#### BUSINESS RETENTION AND EXPANSION VISITATION PROGRAM

COMMUNITY:

BUSINESS REFERENCE NO:

SURVEY DATE:

INPUT DATE:

1. Is all information on the cover sheet complete and correct?

Yes  No  (if no make the necessary corrections)

2. Describe the main activities of your business?

3. Which of the following categories best describes your business activities (please tick appropriate boxes)?

agriculture, forestry, fishing, hunting  communications

manufacturing  community service

finance, property, business services  wholesale and retail

building and construction  transport and storage

recreation, hospitality, tourism,  
personal and other services

4. Is your business locally owned?

Yes

No

If not locally owned is your business?

State company branch

National company branch

International company branch

Other (please explain) .....

5. Which of the following categories applies to your business?

Sole trader

Partnership

Company

Cooperative

6. How long has your business been operating in this community:

Less than 1 year

2 to 5 years

6 to 10 years

Longer than 10 years

7. What are the major products or services offered by your business and what percentage of your sales comes from each area? (just a guesstimate)

	Major Product or service	Percentage sales	Current market
a.	_____	_____	_____
b.	_____	_____	_____
c.	_____	_____	_____
d.	_____	_____	_____
e.	_____	_____	_____

8. What is special or unique about your products or services (BR+E Visitor, please take detailed notes here)

9. How many people do you employ (including Directors and Partners)?

	Total	Male	Female
Number full time	_____	_____	_____
Number part time	_____	_____	_____
Number casual/contractor	_____	_____	_____
TOTAL	_____	_____	_____

10. Over the next two years, do you expect any change in the number of people you employ?

Increase employees

Decrease employees  (tick one box)

No change

Could you explain your choice:

11. What do you perceive as being the main advantages of running a business in our community? (Please tick up to five (5) advantages)

- |  |                          |   |                          |
|--|--------------------------|---|--------------------------|
| local customer loyalty                               | <input type="checkbox"/> | proximity to key industries             | <input type="checkbox"/> |
| quality & supply of local labour                     | <input type="checkbox"/> | reliable transport and freight services | <input type="checkbox"/> |
| housing available for employees                      | <input type="checkbox"/> | proximity to markets                    | <input type="checkbox"/> |
| positive image of the community                      | <input type="checkbox"/> | quality of life the area has to offer   | <input type="checkbox"/> |
| reliable support businesses and other local services | <input type="checkbox"/> | good car parking                        | <input type="checkbox"/> |
| communication networks                               | <input type="checkbox"/> | crime rates                             | <input type="checkbox"/> |
| other(s) please specify .....                        |                          |   |                          |

12. What do you perceive as the main disadvantages of operating a business in our community (Please tick up to five (5) disadvantages)

- |                                  |                          |  |                          |
|----------------------------------|--------------------------|--|--------------------------|
| time/distance from other markets | <input type="checkbox"/> | lack of local support                  | <input type="checkbox"/> |
| time/distance from suppliers     | <input type="checkbox"/> | poor service of local businesses       | <input type="checkbox"/> |
| transport costs                  | <input type="checkbox"/> | slow growth of local market            | <input type="checkbox"/> |
| negative image of the community  | <input type="checkbox"/> | small size of local market             | <input type="checkbox"/> |
| quality of infrastructure        | <input type="checkbox"/> | lack of suitable housing for employees | <input type="checkbox"/> |
| crime rate                       | <input type="checkbox"/> | lack of support by Council             | <input type="checkbox"/> |
| shortage of skilled labour       | <input type="checkbox"/> | planning restrictions                  | <input type="checkbox"/> |
| road networks                    | <input type="checkbox"/> | lack of car parking                    | <input type="checkbox"/> |
| communication costs              | <input type="checkbox"/> |  |                          |
| other(s) please specify .....    |                          |  |                          |

13. How would you rate the outlook for your business over the next 12 months?

- |           |                          |            |                          |
|-----------|--------------------------|------------|--------------------------|
| very good | <input type="checkbox"/> | poor       | <input type="checkbox"/> |
| good      | <input type="checkbox"/> | very poor  | <input type="checkbox"/> |
| fair      | <input type="checkbox"/> | don't know | <input type="checkbox"/> |

Please explain your choice:

14. What are the major constraints to expanding your business? (Please tick up to four (4) reasons)

- |  |                          |                            |                          |
|--|--------------------------|----------------------------|--------------------------|
| availability of finance                | <input type="checkbox"/> | small size of local market | <input type="checkbox"/> |
| limited product range                  | <input type="checkbox"/> | lack of space              | <input type="checkbox"/> |
| market share is too small              | <input type="checkbox"/> | too much competition       | <input type="checkbox"/> |
| franchise restrictions                 | <input type="checkbox"/> | not enough customers       | <input type="checkbox"/> |
| lack of skilled employees              | <input type="checkbox"/> | federal government         | <input type="checkbox"/> |
| achieving recognised quality standards | <input type="checkbox"/> | state government           | <input type="checkbox"/> |
| uncertainty of customer loyalty        | <input type="checkbox"/> | local government           | <input type="checkbox"/> |
| commodity prices                       | <input type="checkbox"/> | small catchment area       | <input type="checkbox"/> |
| other(s) – please specify              | .....                    |                            |                          |

15. Do you expect the sales for your products/services to increase, stay the same or decrease over the next 3 years?

- |          |                          |                |                          |
|----------|--------------------------|----------------|--------------------------|
| Increase | <input type="checkbox"/> | Stay the same  | <input type="checkbox"/> |
| Decrease | <input type="checkbox"/> | (tick one box) |                          |

Please explain your choice:

16. Who are your main competitors?

17. Would you say that your competitors are:

Losing ground to you

Making significant inroads on your market share

No impact either way

A future threat

Can you explain your choice more fully.

18. What do you consider to be useful in helping your business improve its performance over the next 12 months? (tick whichever apply)

improved management skills

enterprise bargaining

improved staff skills

better access to  
industry information

more staff

new products

better access to information on  
incentive schemes for staff

the community and its region

new machinery/equipment

reduced staff

other (please specify) \_\_\_\_\_



22. Are there any industries/businesses/services which you think could be successfully located in this area?

23. If you were to take on any new staff in the future, what skills would you be looking for? (tick which ever apply)

Research skills  Data entry skills

Word processing skills  Spreadsheet skills

Typing/clerical skills  Engineering skills

Strategic skills  Business management skills

Finance management skills  Design/graphic skills

Interpersonal skills  Marketing skills

Negotiation skills  Customer service skills

Public relations skills

Technical skills (describe) .....

Trade skills (describe) .....

Others (describe) .....

24. If you were to take on new staff in the future, what occupations would you be looking for? (tick which ever apply)

Manager/administrator  plant/machine operator or driver

professional  labourer/farm hand

para-professionals  waiter/waitress

ie, technicians  apprentice/trainee

trades person  sales person

clerical  other (specify) .....

25. How did you recruit your last staff member? (tick which ever apply)

- word of mouth  local advertisement   
advertisement in state newspaper  employment agency   
other (please specify) .....

26. Are there any occupational skills you find difficult to find in the community when looking for staff? (tick one box only)

- Yes  No

If yes, please indicate which:

27. Have you considered: (tick any appropriate box)

- moving your business out of the community   
selling your business   
closing your business

If yes to any of the above, are you willing to share reasons?

28. Do you have plans to change, modernise or expand your operation?

- expand   
no change  modernise facilities   
change mix of goods/  
services  add product line   
change production technology  add services

29. If changes are planned, are you willing to describe what is planned, and when work will begin?

30. Would you like additional information concerning the following subjects, (tick whichever apply).

- |                   |                          |                      |                          |
|-------------------|--------------------------|----------------------|--------------------------|
| business planning | <input type="checkbox"/> | business management  | <input type="checkbox"/> |
| taxation          | <input type="checkbox"/> | marketing strategies | <input type="checkbox"/> |
| council by laws   | <input type="checkbox"/> | R+D grants           | <input type="checkbox"/> |
| merchandising     | <input type="checkbox"/> | finance              | <input type="checkbox"/> |
| exporting         | <input type="checkbox"/> | e-commerce           | <input type="checkbox"/> |
| other             | .....                    |                      |                          |

If no proceed to question 38.

31. Do you have any specific questions or special needs on any of the topics ticked in question 30?

32. With your permission can we share your firm's name with the local, state or federal agencies that provide this information?

Yes  No

33. What avenue is most helpful to receive this information? (tick all appropriate)

- |                         |                          |                         |                          |
|-------------------------|--------------------------|-------------------------|--------------------------|
| information in the mail | <input type="checkbox"/> | workshops               | <input type="checkbox"/> |
| videos                  | <input type="checkbox"/> | individual consultation | <input type="checkbox"/> |

34. Is your business experiencing any problems with any section or department of local, state or commonwealth government?

Yes  No

If yes, what problems:

35. While the BR+E Taskforce can not promise to solve any issues, they are willing to look in to it. Would you like our Task Force to assist you with any particular problems/issues?

Yes  No

If yes, what do you suggest?

36. Is your business on-line: that is, connected to the Internet?

Yes  No  (If no, proceed to question 40)

37. If yes, please indicate the main on-line activity of your business: (tick one only)

internal communications (ie: e-mail to staff, head office)

external communications (ie: e-mail from customers and suppliers)

banking/finance

research

other (please explain) .....

38. Does your business have a web-site?

Yes  No

39. If yes, what percentage of your sales comes from your web-site?

40. Our local Business Association, - do you feel your business receives any direct or indirect benefit from the existence of it?

Yes  No

Please explain your answer more fully:

41. Would your business be interested in being involved in a “shop local” campaign?

Yes  No

If yes, what suggestions do you have?

42. Do you have any other ideas or suggestions about making our community a better place to operate a business?

43. Finally, have you found this questionnaire helpful in expressing your views about operating a business in our community?

Yes  No  Not sure

**Thank you for your time**



## Appendix 9

### **PUBLIC MEETINGS**

Public meetings are an important tool to introduce and maintain community interest and involvement in community economic development. To ensure effectiveness, attention needs to be given to many aspects before, during and after the meeting.

Suggestions:

#### **1. Before the meeting**

- Determine a date and time which you believe is the most convenient for members of the community. Avoid clashing with other regular community meetings or major sporting events. Consider the most convenient time to ensure maximum participation.
- Determine the best venue. Keep in mind issues like comfort, temperature, opportunity to socialise, acoustics, transport, parking and accessibility.
- Consider the possibility of offering childcare facilities.
- Ensure community members received adequate notice - use every creative means to inform and encourage attendance - mailouts, pamphlets, posters, personal invitations, announcements at churches, statements in school bulletins, radio, announcements, press statements.
- Make sure any outside speakers or resource people receive written notification, a map and background information. Ensure they arrive well before the meeting - provide them with a (written) briefing.
- Select an experienced chairperson - who understands the purpose, has excellent public speaking skills and demonstrates a positive approach.
- Ensure an adequate PA system is available.
- Arrive early to set up appropriate room arrangements. People participate best when they can see each other and are close to speakers or resource people. Generally chairs arranged in a horseshoe formation close to speakers is best. Avoid straight rows and placing presenters and leaders on stages or behind tables!
- Ensure adequate seating, but do not put out all chairs, otherwise front rows will remain empty.
- Ensure a layout style which has participants with their backs to entry point.

## **2. During the meeting**

- Provide name tags, and have people to welcome participants on arrival.
- Organise decor, entertainment and refreshments which reinforce a warm, welcoming and interacting atmosphere, eg, pre-meeting tea or coffee, background music, displays, a meal to encourage people to stay around afterwards.
- Start on time.
- Provide a warm welcome to all, and any special guests. Clearly state purpose of meeting (use overheads or flip chart paper to reinforce key points and agenda where possible).
- Encourage audience reaction and contribution.
- If meeting involves controversial issues and/or brainstorming functions, ensure ground rules are mentioned and/or distributed.

Example of ground rules.

1. Check in old disputes, feuds and ideologies at the door!
  2. Anything goes! Don't be afraid of new ideas. Respect the opinion of others.
  3. Keep ideas, opinions and comments short.
  4. Allow everyone to contribute.
  5. Focus on the positive. Avoid spending time blaming others and dwelling on what has not happened in the past.
- Appoint someone as scribe to record the key points and decisions.
  - At the end of the meeting, provide a summary of any agreed outcomes and future actions.
  - Thank people for coming, and if a meal is provided encourage them to stay on and enjoy it.
  - Acknowledge individuals/groups who have contributed to the organisation of the meeting.

## **3. After the meeting**

- Make sure outcomes of meetings are communicated to participants and the wider public via press, mailouts, flyers or pamphlets, use of radio talk shows and phone in programmes.
- Seek feedback from participants.

## Appendix 10

### **Community Opportunity Workshop**

A community opportunity workshop can be a useful strategy for bringing a cross section of the local community together to plan for the future of their community. It needs to be a participatory meeting for the whole community.

There are many practicalities that must be understood and addressed to ensure a successful community opportunity workshop. Areas of particular attention include:

#### **Establishment of an organising committee**

An organising committee should be established to oversee the organisation, promotion and outcomes of the event. This committee should represent a cross section of the community and provide links to key interest groups and stakeholders.

The committee should be convened at least two months before the date of the proposed event.

#### **Choice of the right time and place**

Some consultation with key community groups will be necessary before a suitable time and place can be chosen.

When considering the right time of the day, the following points should be kept in mind:

- avoid key sporting events and service club meeting times
- try not to intrude on normal working hours
- try to allow a maximum of five hours total (including a meal break)
- allow enough lead time for adequate promotion

Experience has shown that 5.30 pm to 10.00 pm is a good time period. (Especially when dinner is included!)

#### **Development of a promotional campaign**

There should be a clear and agreed upon strategy established for telling the local community about the event and motivating them to come along. When designing such a campaign, consideration should be given to including the following components to a promotional campaign:

- posters, banners
- leaflets - including mail-outs and distribution through key networks
- community radio announcements
- radio interviews
- television announcements (where appropriate)

- use of community networks (see below)
- novelty (eg, use of a town crier), innovative displays etc

### **Use of community networks to promote the event**

Whilst the use of community networks must be a part of an overall promotional strategy, it is a factor that deserves special attention. There is no single promotional strategy that is more important than the use of community networks. The power of a personal invitation to attend a community planning events is ten times more effective than reading about it in the newspaper, or hearing a community announcement on the radio.

Announcements and leaflet distribution through local church services, service clubs and schools can also be very effective.

One successful approach is to ensure each member of the organising committee commits themselves to personally invite 10 to 15 people. Another is inviting each community organisation to nominate two representatives to attend.

### **Use of the media**

The media is one of the most pervasive and effective forms of promotion. However, it can also be very costly.

Some ways of using the media at little or no cost include:

- sending press releases to the news desks of all media outlets
- making personal contact with editors and producers
- using any media contacts that members of the organising committee may have
- use of community newspapers and newsletters
- always looking for a news-worthy 'angle'
- inviting a number of key stakeholders to write a column or 'letter to the editor' in the local newspaper about their views for the future and encouraging people to participate.

When using the media it may be useful to keep in mind a few of the phases of the event and its organisation. These include:

- the announcement phase - announcing the event - where it will be, when and why
- the planning phase - letting the media know of the developments (eg, who the guest speaker will be, comments from key organisations which are supporting the event, and expectation regarding the implementation of ideas that come up at the event)
- a few days before the event - a final reminder of the details and comments of anticipation
- the event itself - coverage of the event itself
- the results - a report on what was achieved and what the next steps will be

## **Catering considerations**

Due to the time required to conduct an effective planning event, there will need to be a break for refreshments. Such a break (eg, dinner or lunch) can also become an important part of the informal program, allowing participants to interact.

Some considerations when planning for catering:

- provide a cup of tea or coffee when participants arrive
- keep the meal as simple, inexpensive and light as possible (soup and sandwiches have often proved to be an effective combination)
- try to avoid too much formality
- conclude with supper - provides the environment for people to linger and talk at the end

## **Child care facility**

The provision of childcare for the duration of event can enhance attendance. Some communities have also found the organisation of a youth club event has enabled all adult family members to attend.

## **Program considerations**

Before outlining some of the essential elements of the program it is important to be clear about the ultimate objective of the event. This is to describe an agreed upon vision for the future of the community and to come up with a series of practical actions that can be taken locally toward achieving that vision. It is important that the meeting, and a group of volunteers, commit themselves to certain, specific actions that they will undertake. To get to this point, the following program elements are important:

### **a. Introduction and program orientation**

It is important that the purpose of the event is clearly spelt out at the beginning of the program. No matter how clear the promotional campaign will have been, there will always be a number of people who have their own very different ideas on the purpose of the event.

### **b. Presentation (thought provoker)**

It may be useful to have a speaker to give a thought provoking presentation on the community and its opportunities and what other communities are doing. This presentation should not be seen as a limiting influence on what people should think about; instead it should be thought provoking and stimulating - helping people to come up with new ideas and enhancing 'possibility thinking'.

**c. Development of a common vision**

This part of the program requires participants to think about the future of their community in broad terms - to develop their views on the community and a general and broad idea of what they want their community to become (for example by the year 2002).

**d. Strategies to secure that vision**

Having developed a general and common vision for the future, it is necessary for participants to recommend practical strategies that can be implemented to help secure that future. This will require brain storming and creative thinking. Whilst in working groups, participants will be required to come up with as many ideas for strategies as they can.

**e. Identification of priorities**

Once the working groups have presented their most popular ideas and strategies, it is necessary for the whole meeting to decide which strategies are the most valuable and important (ie, have priority).

**f. The next step**

Having evolved a collection of practical strategies, it will be necessary for the meeting to decide on ways to act. It is important that the meeting concludes with agreement on the immediate actions required, and the formation of task groups to begin implementations. A decision is also required to determine the coordination of these actions.

**Use of ground rules**

It is useful to include a copy of ground rules within the program handout as people arrive, or to display as posters around the room. It is important for the chief facilitator to reiterate the rules at the start of any workshop activity.

A possible set of ground rules could be:

1. Check-in old disputes, feuds and ideologies at the door.
2. Anything goes! Don't be afraid of new ideas. Respect the opinion of others.
3. Keep ideas, opinions and comments short.
4. Allow everyone to contribute.
5. Focus on the positive. Avoid spending time blaming others and dwelling on what has not happened in the past.

**Role of key players**

In any planning event, there are a number of key roles to be played. These include the following:

### **Chairperson:**

The Chairperson is responsible for overseeing the event. This person usually opens and closes the meeting and provides introductions. The Chairperson will also keep track of time.

### **Meeting Facilitator:**

The Meeting Facilitator is the person who conducts the meeting. This person is responsible for ensuring that the processes of the meeting occur as they should.

### **Small Group Facilitators:**

Each small (or working) group will have a facilitator. This person's role is to ensure that the group achieves its task within the specified time and that everyone in the group has a chance to speak and contribute.

### **Presenters/Dignitaries:**

Depending on the arrangements made by the organisation committee, there may be a few presenters or dignitaries involved. These people should not take too much time with formal speeches.

### **Administrator:**

This person is responsible for coordinating the overall event and for issues such as catering, registrations and equipment.

### **Briefing of small group facilitators**

At some point prior to the beginning of the program, the Meeting Facilitator will be required to brief the small group facilitators. This will ensure that all facilitators have an accurate idea of the program, the purpose of the event, and their role as facilitators.

### **Lay out of the room**

There are a number of important considerations to think about when designing the lay out of the room (s). These include:

- keeping the eating area separate from the meeting areas,
- when arranging seating in the main hall or room, ensuring that the seats are in a horse shoe or semi circular shape and as close to the presenter and Meeting Facilitator as possible - try to avoid theatre or lecture style seating,
- ensuring adequate seating, but do not put out all seating. Put out 80% of estimated attendance, with stacks of chairs easily able to be accessed. Nothing is worse than a

- meeting with lots of empty seats and complete empty front rows (creates a physical barrier between speakers and audience),
- ensuring seats face away from venue entrance, so any late comers do not disturb meeting. Keep back row free for late arrivals (put reservation notices on them),
  - when arranging seating for the working groups, ensure that these can be in a circular format, preferably around a table and as far as possible from other groups.

### **Identifying equipment needs**

Most community planning events will require the following equipment:

- TV and video
- overhead projector (including blank transparencies and water based felt pens, and spare globe)
- a white board (including a white board wipe and water based felt pens)
- a large quantity of 'butchers paper' or flip chart paper, and felt pens
- a roll of masking tape
- a few boxes of dot stickers may be needed for the voting exercise
- depending on the size of the group and the 'acoustics' of the meeting room, it may be necessary to have a microphone; however, microphones can be very annoying and difficult to manage

The following sample program gives an outline of how a community planning event may be conducted:

- |         |  |
|---------|--|
| 5.00 pm | Registration and tea/coffee  |
| 5.30 pm | Welcome by the Chairperson   |
| 5.35 pm | Official opening, introduction and program overview  |
| 5.40 pm | "Possibilities for the Future" - a brief presentation by an interesting speaker  |
| 6.10 pm | A report from the young people's community planning meeting - presented by a delegation of young people (optional)                           |
| 6.25 pm | Introduction to the meeting Facilitator  |
| 6.40 pm | Our Vision for the Future - plenary session.<br>Determining comparative advantages, limitations and future characteristics of our community. |
| 7.00 pm | Break for dinner   |

- 7.40 pm Strategies for future development - break into discussion groups.
- 8.30 pm Presentation of practical strategies resulting from group discussions.
- 8.50 pm Ranking strategies by priority
- 9.15 pm Identification of future directions and people wishing to join a task group
- 9.25 pm Closing remarks by the Chairperson
- 9.30 pm Close and supper

### **Post-event activities**

Follow-up initiatives need to be determined prior to the event so that follow-up action plans can be announced at the close of the event. The following types of initiatives are important:

- compilation and distribution of information and recommendations that emerge during the event
- formation of action task groups (and their support)
- media coverage of events and outcomes
- continued coordination mechanism
- identification of some early achievements
- future program events and their timing

### **Conclusion**

A community planning event can be a vital occasion in the life of a community - a time when, through group consensus, preferred futures are decided and actions determined. Experience has shown that its success will be in proportion to:

- the extent of community participation
- the quality of planning and preparation work
- the skills of the facilitator
- the degree of participant enjoyment, enthusiasm and contribution
- the level of commitment to follow-up action
- the effectiveness of media support
- the achievement of some early practical results

Appendix 11

**COMMUNITY SKILLS AUDIT**

Within all communities there lies an untapped pool of skills, knowledge and work experiences that can be used in local development efforts.

A simple skills audit has been used in many communities to identify these latent skills and interests of residents and their willingness to share it. Such information needs systematic recording and can be used to fulfil community needs or to investigate new initiatives.

The following page provides a simple form for collecting this type of information. This information then needs transcribing to a computer, preferably on a program capable of responding to keywords.

## **Community Skills Audit**

Our community is rich and diverse in terms of the skills, interests and work experiences of its residents. As a first step to identifying what skills and talents actually exist we need your help to complete this form.

Please note: Filling out this form is optional. The information you provide will not be shared with other people without your permission.

Name: \_\_\_\_\_

Postal Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Current Occupation: \_\_\_\_\_

Previous occupations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Hobbies: \_\_\_\_\_

Special interests: \_\_\_\_\_

\_\_\_\_\_

Other languages spoken besides English: \_\_\_\_\_

Other special skills: \_\_\_\_\_

\_\_\_\_\_

Are you willing to share any of the above skills with others? YES/NO/MAYBE

Thank you for taking the time and effort to complete this form.

If you have any questions or concerns please call (*name*) on (*telephone no*)

## Appendix 12

### **TIPS FOR WORKING WITH THE MEDIA**

The media (newspapers, TV, radio) are a very important means of informing the public about your group and projects. Media coverage is a vital information, marketing and promotional opportunity which no community group can afford to ignore. However, effective use of the media is a skill which needs to be developed.

#### General Principles

- Decide who will deal with the media. Whether you use one person or a group to deal with publicity, it is essential that reporters know whom to contact for a clear, mandated comment or statement. Channel all communications with the media through one spokesperson and ensure all your members know who this is.
- Be careful not to raise local expectations beyond what you can deliver. This will quickly lose your credibility with the community and it will take a long time to get it back.
- Be proactive - seek the media out. Do not wait for the media to chase you. Make a list of local newspapers, radio and TV contacts, including local newsletters). Look out for trade and specialist publications who may be interested in your initiatives.
- Establish relationships. Get to know local reporters, correspondents and editors. Find out about their deadlines and the issues they are interested in. But do not waste their time.
- Don't play favourites with the local media. Alternate the times you give out stories and press releases so you do not favour one paper or radio station.
- Be open and reliable - give accurate information. Stick to the facts. If you are giving an opinion make sure you state it is your opinion. Provide honest answers to questions and do not be afraid to say that you do not know something. If you are phoned by a reporter to comment on something, feel free to ask for 10 minutes to collect your thoughts, but make sure you phone back.
- Invite media representatives to your meetings. Send them minutes (always with a prepared media statement summarising the key points you wish to convey), give them early notice of important events. Always provide an after hours phone number at the end of any press statement or after an interview and return calls promptly. Go out of your way to report progress.
- Be helpful - most media organisations are short of time and resources. The more you can help them without being asked the better. Put particular effort into writing

media press releases (see below). Journalists are usually too busy to spend a lot of time rewriting press releases.

### Make sure it's news

The media look for news that is new, unusual and which in their opinion will interest their readers, listeners or viewers. Do not bombard them with press releases every time you have an idea, you will soon develop a bad reputation.

As a general rule, the more local the media outlet (local newspapers, community radio) the greater their feeling of obligation and willingness be to report events and issues of interest or benefit to the local community.

Make sure your news is fresh and allow time for reporters to meet their deadlines. Arrange photographic or video opportunities or provide good quality photographs (most media prefer to take their own).

Stories in which your local media could be interested:

- new projects and initiatives
- openings and launches
- festivals
- visitors with special skills or experiences
- success stories
- awards and presentations
- surveys and statistics
- workshops and community meetings
- contests
- local and overseas study tours and visits
- exchange programmes
- research projects
- unusual local businesses - could be products, services or the people involved.

### Ways of conveying news to the media

- Media press releases
- Phone calls/alerts
- Invitations
- Media conferences
- Radio phone-in shows
- Circulation of documents
- Letters to the Editor

### Press Releases

A press release (media release or press statement) is one of the most efficient ways of informing the media or making an announcement. It saves your group and media

outlets time, helps get the facts correct and enables your group to inform a range of media outlets at the same time. It is simply a statement that tells "the WHAT, WHEN, WHERE, HOW, and WHY" concisely.

A press release must create a positive image in the critical eyes of the media. Poorly drafted press releases usually end up in the rubbish bin and reduce the credibility of your group.

To enhance the effectiveness of your press releases, note the following:

- Use a media release letterhead which reflects your group's identity - keep the design uncluttered and avoid using small typeface.
- Make sure you grab the reader's attention in the headline and the first sentence.
- Place the most important facts at the top and then arrange your material in descending order of importance. Do no attempt to get everything into the first (lead) paragraph, which should consist of no more than 30 words.
- Ensure material is accurate. Check all facts especially spelling of people's names and titles.
- Keep it short, preferable a single page, two pages at the most. (Keep to 400 words or fewer).
- Ensure it is dated and contains a contact name and phone/fax numbers. Make sure the contact person and telephone number are obtainable when journalists are likely to call, many journalists work at night or early in the morning.
- Know the copy deadlines of your target media outlets.
- Make sure you issue your release on the best day for maximum coverage. Generally a release issued on Monday or Tuesday will get better coverage than one released on Friday.
- State the timing for release if not for immediate use, ie, embargoed until date and/or time.
- Attach any visual material, photographs, logos, maps, diagrams

In terms of media release writing style, note the following:

- Use simple language and sentence construction. Avoid the use of jargon and cliches.
- Use positive words and phrases.
- Use short paragraphs - often one sentence is enough. Limit sentences to 25-30 words.
- Write names of people and organisations in full the first time they appear in the text. Add abbreviations in brackets afterwards [eg, Business Enterprises Centre (BEC)].
- Use quotes to make it more interesting.
- Write in the third person, eg, 'he said' or 'she said', not 'I said' or 'I was'.
- Do not use underlining - underlining is an editor's instruction to print those words in italics.
- Spell out numbers from one to nine, except for dates, times, prices, weights and measures, then use figures until they become unwieldy thousands of millions.
- Do not use the % sign, spell out "per cent" as two words.

- Limit the use of capitals.

Radio interviews:

- Arrive early for studio interview
- Speak with producer before interview
- Check on time allowed
- If program is going out live, listen to program beforehand
- Relax and breath calmly
- Prepare and key words and phrases sheet about themes you want to speak about
- Leave an information sheet with contact details

## D. USEFUL PUBLICATIONS

Allen J, Cordes S, Hart J, (1999) *Vitalizing Communities: Building on Assets and Mobilizing for Collective Action*, Lincoln: The Center for Applied Rural Innovation, University of Nebraska- Lincoln. ([www.ianr.unl.edu/rural/materials](http://www.ianr.unl.edu/rural/materials))

Carmen K and Keith K, (1994) *Community Consultation Techniques: Purposes, Processes and Pitfalls: A Guide for Planners and Facilitators*, Brisbane: Department of Primary Industries.

Cavaye J, (2000) *Our Community: Our Future*, Brisbane: Department of Primary Industries.

Coakes S, (1999) *Consulting Communities: A Policy Maker's Guide to Consulting with Communities and Interest Groups*, Canberra: Bureau of Rural Sciences.

Department of Commerce and Trade (1993) *Working with Communities: A Guide for Proponents*, Perth.

Domack D, (1996) *Creating a Vision for Your Community - More on the art of community development*, University of Wisconsin, Madison, Wisconsin.

Kenyon P, (2000) *The Community Builders Resource Manual*, York: Bank of I.D.E.A.S.

Kenyon P, (2000) *The Business Retention and Expansion Handbook*, York: Bank of I.D.E.A.S.

Kretzmann JP and McKnight JL, (1993) *Building Communities from the Inside Out - A Path Towards Finding and Mobilizing a Community's Assets*, Chicago: Center for Urban Affairs and Policy Research, Northwestern University.

Oklahoma Community Institute (2000), *Community Resource Mapping - Mining Local Resources* (Oklahoma City)