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MEDA Resource Team Assessment Working Group
October 12, 2017
9:00am – 10am

One the call: Gus Byrom, Kathy McLane, Sue Taylor, Dianne Lehm, Paul Lachapelle, and Gloria.

1. Review of Three Phase draft
Sue Taylor reviewed the very rough draft of the proposed three phases of resource team assessments.
2. Recommendations for Ripple Effects Mapping
Lockwood and Laurel - week after Thanksgiving or Dec 4 or 8?
Deer Lodge was also suggested. Dianne will look at those dates for Laurel and Lockwood and get back to us. Invite: the home team and the visiting team.

Seeley Lake – different results for mapping than say, Laurel. Gus Byrom suggested waiting until summer for its one year celebration as Seeley is going through a lot right now. Gloria to Jenni Graff.

Sanders County, Ronan, and Malta could also be considered for REM.
3. Resource Team Assessments Pending – ideas – list from MDOC/CDD
Poplar, Choteau, Chester
4. Misc.

Montana Community Assessment Phased Approach

Community Participation Requirements

- Application
 - Completed by Home Team with assistance from CRDC and/or LDO.
 - Home Team members should be representative of the community as a whole and as inclusive as possible (*Please refer to the checklist of recommended Home Team members in the application*)
 - Program introduction and overall program goals
 - Community goals by topic
 - Financial expectations
- Community readiness assessment checklist
 - CRDC to work with local leaders and Home Team to help complete checklist
 - County Extension agent to assist whenever possible

- Community readiness will be a factor for participation and scheduling
- Letter from CRDC and/or LDO
- Letter from Mayor requesting participation

Prep for Phase 1 - Primary Goal: Montana Design Team and CRDC evaluation of community readiness and identify areas of concern.

- Distribute Community Survey (standardized)
- Questionnaire (start with the existing and add questions as deemed necessary by the Montana Design Team)
- Bi-weekly conference calls with MEDA (organizer), CRDC, Home Team, and Montana Design Team members beginning 6-8 weeks in advance of small team visit
 - Discuss learning sessions and format (sector-specific sessions, cross-sector sessions, partial written responses, open house location(s), potential underlying issues, etc.)
 - Discuss strategies to increase participation by all community members
 - Identify the two additional questions to be asked during Learning Sessions and Open House Session(s), such as tell us about a recent change in your community, or tell us about a long-standing change that has yet to be completed

Phase 1 – Primary Goal: Visiting Team gains knowledge of the community and residents’ level of engagement in community issues. Secondary Goal: Community members begin to explore strategies for better communication and ways to become more engaged in their community.

- Small Visiting Team arrives in community with basic knowledge of community and needs
 - Primarily local members to reduce need for hotel rooms
- Learning sessions conducted for the Small Visiting Team to gain more knowledge of the community, its needs, dynamics and areas of concern.
 - Sector-specific sessions, organized by Home Team
 - At least one open house style session, organized by Home Team, where all community members are encouraged to attend
 - Allow for space to have open forum discussions by topic to encourage more community conversation and engagement in the process
 - In addition to the standard 3 Assessment questions, add two Home Team generated questions that would spur conversation among community members
- Town Hall meeting
 - Expectations – visiting team expresses
 - Topic Areas presented by small Visiting Team
 - Community sets their topic area priorities

Prep for Phase 2 – Primary Goal: Montana Design Team evaluation as to Phase 1 conclusions and recommendations for Phases 2 and 3

- Montana Design Team and DRCD and/or LDO determines go, no-go, or not quite ready for Phase 2
 - Determine if a specific set of criteria is needed at this point, or if an open discussion with the small Visiting Team, Montana Design Team, CRDC, and LDO will accomplish the same results since every community will need to be evaluated on an individual basis
 - Discuss the value of introducing additional hybrid strategies

- If a go, select full Visiting Team based on individual and/or organization's strengths and align the Visiting Team's strengths with community priorities identified in Phase 1
 - Full team reviews existing planning documents as appropriate
 - Begin weekly conference calls with organizer, Montana Design Team, CRDC, Home Team and larger Visiting Team beginning 4- week in advance of Phase 2
- If a no-go, or not quite ready, discuss and identify appropriate steps to help a community reach "go" status

Phase 2 – Primary Goals: Full Visiting Team digs deeper into community priorities in order to provide meaningful recommendations for community implementation; and participating community begins the process of better communication and broad-sector engagement

- Full Visiting Team arrives in community with preliminary report based on community priorities and Montana Design Team recommendations
 - Meet with larger Home Team
- Home Team helps to schedule time for visiting team member tours to gain a better understanding of specific areas of community concern
- Community Conversations by topic – allow a minimum of 90 minutes for each
 - Sessions open to all community members
 - Home Team schedules at least three in one day (optimally one morning, one afternoon and one evening)
 - Multiple tables or conversation areas are set up for open dialog among community members
 - Allow 30 minutes for open discussion based on a specific topic
 - Allow 45 minutes for 2+4+8 process
 - Community members are asked to individually complete Worksheet A identifying three issues they personally consider to be a priority and a potential project associated with that issues (10 minutes)
 - Members attending the session are then asked to work as a pair and complete Worksheet B, discuss their three issues and potential projects with each other and see if they can agree on 2 of those projects (10 minutes)
 - Two pairs are then combined to form a group of four with the goal of building consensus around 2 of these projects (10-15 minutes)
 - Combine groups once again to eight and build consensus once again (10-15 minutes)
 - Allow 15 minutes for report out and capturing of group discussions
 - Allow time after the report out for further community discussion
- Full Visiting Team work session
- Select mentor / Coach from Full Team
- Town Hall meeting
 - Expectations
 - Introduce Community Coach and allow time for brief background and desire to assist the community for the next year
 - Introduce potential implementation timeline
 - Community members present results of 2+4+8 process
 - Community members prioritize short-term, mid-term, and long-term projects

- Challenge community to do a 30-day project, including a mini-grant to accomplish the project

Prep for Phase 3 – Primary Goal: Full Visiting Team, CRDC/LDO, and Montana Design Team evaluate conclusions and recommendations for Phase 3 and post-assessment activities

- Conference call with full Visiting Team to help determine appropriate strategies in order for the community to reach their goals as well as overall Community Assessment program goals
 - Strategies will include tools such as Study Circles
 - Determine who will be responsible for producing community action plans
 - Provide template for community action plans
- Final full Visiting Team report delivered to community
 - Provide Community Action Plans for top priorities
 - Allow 2-4 weeks for Home Team to read and distribute report
 - Mentor schedule call with Home Team to discuss report and areas of concern or address questions
 - Follow up with Visiting Team as needed to clarify questions (this will also be an ongoing activity)

Phase 3 – Primary Goal: Generate community excitement and launch implementation of the community's plan.

- Mentor, Organizer (MEDA) and any available Visiting Team members attend in person and others from full Visiting Team and Montana Design Team available via Zoom or conference call
 - Full Home Team and interested community members attend
 - Discuss next steps and first project(s)
 - Generate community excitement!
- Introduce community evaluation Tool(s) as a way for the community to determine that their goals are being met
 - Measurable outcomes needed

Post-Assessment – Primary Goal: Ensure the best long-term results for a community utilizing their available assets and leveraging existing local, state and federal resources as needed

- Visiting team, Home Team and Montana Design Team debrief within 2 weeks of final report presentation (Conference call)
- Monthly mentor phone calls with community leaders, project managers, and resource providers as needed
 - Mentor will invite other resource providers to join on the monthly calls as needed in order to achieve optimal results for the community
- 1-year celebration
- Redistribute community survey (standardized)
- 1-3 years after assessment – Ripple mapping
- Community evaluation

Other considerations:

- Promotional piece for assessments (in addition to the 3-state brochure?)

- As we work on readiness, have an application form and be strategic – be sure to include the communities are meshing with CDBG/CD plans.

Definitions:

- CRDC: Certified Regional Development Corporation
- LDO: Local Development Organization
- Montana Design Team: Paul Lachapelle, Gloria O'Rourke, Gus Byrom, Sue Taylor
- Home Team: Local community leaders and residents
- Phase 1 Visiting Team: two members of the Montana Design Team, CRDC, LDO, Chamber, County Extension agent, if appropriate (approximately 4 people total)
- Full Visiting Team: Topic area resource people from around the state who are chosen to assist the community in reaching their goals