

PRE-PLANNING TACTICS CHECKLIST

Phase 1: estimated 12-18 months

Pre-planning is the phase before engagement with the neighborhood really starts and planning gets underway. It mostly consists of the three following things:

1. Building solidarity among resident leaders, partners, and collaborators.
2. Taking stock of where the neighborhood currently is, identifying strengths and weaknesses, and defining it's goals.
3. Raising awareness of the common needs, leadership opportunities, and outlook for the process.

It can take as little as 6 months, or as long as 18 months for this phase depending on how organized your neighborhood is already. We have outlined these as steps and as a checklist for your process.

View the resources and Plays referenced for more information about how to complete the task:

Tactic	Play(s)
Recruit and organize the group of residents that will lead the planning effort & make decisions.	#1, #8
<ul style="list-style-type: none"> • Decide what the various roles are within the planning effort. This may include creating job descriptions, an org chart, and neighborhood system map. 	#3, #5
<ul style="list-style-type: none"> • Create a way to notify residents of the opportunity. For example, you may mail a letter with a “call-to-action” to residents in the neighborhood. 	#2
<ul style="list-style-type: none"> • Create a recruitment strategy and selection process. Perhaps create an application and have other residents review the applications to choose the best candidates. 	#2
Inventory the strengths of your neighborhood and people.	#1, #8
Select a visual identity (like a brand logo & colors) that the neighborhood will connect with.	#1
Establish a rhythm of meetings for the group that will lead and govern the process - this can be weekly, every other week, or monthly. Ensure the meetings are frequent enough so that information is not lost over time, but not so frequent that they become redundant or work is not able to commence between them. This frequency may change throughout the process depending on the work being done.	#1
Set an annual calendar of events you want to hold around issues the neighborhood faces and how residents can get involved.	#1
Collect as much information as you can about how your neighborhood works - What groups exist? What do they do?	#1, #8
Research and understand your local processes and requirements for a planning process and neighborhood plan. This can sometimes include engagement requirements, timing, category/type, and format. Solicit technical assistance from the local government to help with anything you don't understand as well as providing details about the requirements.	#1#6

Tactic	Play(s)
Recruit local organizations and stakeholders to contribute feedback around the mission of the plan effort in the upcoming phases.	#6, #8
<ul style="list-style-type: none"> Share the proposed project timeline and key points where they can contribute. 	#1
Source funding & partnerships.	#6, #8
Establish up front where you will house information and tracking of the process, i.e. website, social media page, google group, recorded phone calls, or physical noticeboard.	#2,
<ul style="list-style-type: none"> Keep in mind the ways your community best interacts with information and make it accessible to your neighbors. 	#14
<ul style="list-style-type: none"> Delegate someone to manage the information and keep it up to date. 	#3, #5
Establish consistent communication with residents about who you are and what you are doing (i.e. a monthly or quarterly mailer, social media, email newsletter, etc.)	#13, #10