

First Impressions Community Exchange



Coordinator's Guide



**Government
of Alberta** 



A Stepping Stone on the Path to Community Sustainability

The *First Impressions* model was originally developed by Dr. Andy Lewis, of the University of Wisconsin Cooperative Extension, Center for Community Economic Development and later adapted by the Ontario Government. The Community Swap was developed by the University of Illinois Extension. Appreciation is extended to the Government of Ontario for providing permission to adapt their materials for the Alberta FICE program.

***The FICE Consulting Team in Alberta appreciates the willingness
of the developers of the
First Impressions and Community Swap
to share their ideas and resources.***

The Alberta Urban Municipalities Association (AUMA) and the Government of Alberta (GOA) have formed a partnership to adapt and deliver the First Impressions Community Exchange (FICE) program for Alberta municipalities. Many smaller Alberta municipalities are ready for change and are interested in positive steps such as municipal sustainability planning, beautification, community spirit and revitalization initiatives. It is hoped that the FICE program can serve as a practical tool in helping to identify and develop areas of opportunity within a community.

The benefit of FICE is that it provides communities with a fresh perspective that is delivered by a fellow community which likely has a good understanding of the barriers to community development and may have some firsthand, practical ideas of how to overcome them. Another aspect of the FICE exchange is the opportunity for municipalities to partner with local businesses and other organizations to develop and champion action plans that address areas of need and opportunity.

Thank you for your interest in the FICE program, and we hope that your community will find FICE to be a valuable and worthwhile tool in support of community sustainability.

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1.0 Introduction

The Province of Alberta is rich in diversity and opportunities. As communities look to the future they will be impacted by development in many ways. As a result, sustainability is, and will continue to be, an important consideration for Alberta, its communities and its people.

The First Impressions Community Exchange is a vehicle to invite non-local residents to provide constructive feedback on what is working well within identified communities as well as identify what could be done differently or improved upon. Each of the two communities participating in the exchange will benefit; taking away from the experience information that can be used in developing future plans and ultimately, helping communities identify how dollars should be allocated on a priority basis.

1.1 About Community Exchanges

It has been said that, “you never get a second chance to make a first impression”. This first impression can be the deciding factor on how a community is seen and remembered by newcomers, potential business investors and visitors. We only get one chance to make that critical first impression. Living in a community, we often become so accustomed to its appearance, layout, strengths, and shortcomings, etc. that it is difficult to imagine it any other way.

First Impressions Community Exchange (FICE) was first developed in Wisconsin as a relatively simple, inexpensive community development tool. It involves two municipalities of similar size and situation sending small teams of volunteers to each other's communities to assess aspects such as friendliness, aesthetic appeal, housing, infrastructure, recreational opportunities, and other elements of the community in order to determine how different individuals and organizations such as youth, business people and retirees might view a community and decide whether or not to visit, live or locate a business there. Once volunteer teams have conducted their visits and assessments the communities meet to share reports and exchange feedback that highlights the strengths of the other community and identifies areas that could benefit from community attention.

The exchange process is a simple one:

- interested community organizations and municipalities complete an application form and submit these completed forms to the Alberta Urban Municipalities Association (AUMA) FICE
- through the application and matching process, communities are paired a similar community , each being defined as an “Exchange Community”
- each community sends a team of volunteers (Visiting Exchange Team) to visit and make observations of the other community
- following the exchange, the Visiting Exchange Teams with the leadership of their Coordinator prepare and present a report of their impressions to the other community.

This feedback is intended to help participating communities identify areas of opportunity, set priorities for community revitalization, and develop an action plan that establishes a series of steps to enhance first impressions.

The action plans provide a meaningful opportunity for community groups (e.g. businesses, agencies, etc.) to work in partnership with the municipality on next steps.

The Exchange experience and action planning can be a catalyst for more strategic initiatives and steps to enhance the community's sustainability.

1.2 Expectations

The Participating Community will:

- identify a Coordinator to plan and implement the First Impressions Community Exchange program
- support the Coordinator in his/her efforts
- prepare a budget and secure funds for the exchange
- ensure that the Visiting Team participates in the Exchange and that the appropriate reports and presentations are completed
- if the Participating Community is unable to send a team to visit the Exchange Community, attend the meeting and/or host a meeting, it will absorb the cost of a professional to take on the role of the Site Coordinator to conduct the visit, present a report and/or host a meeting.

Following the report presentations, within two months, each community will develop an **action plan** to address issues identified in the report.

1.3 FICE Consulting Team Support

AUMA is offering two options for your participation in the FICE program this year:

- a fully supported program in which the FICE works with the Coordinator and Community throughout the process
- a limited support program during which the Coordinator manages the process.

Table 1: FICE Support Options

Option	FICE Support
Full Support Program	<ul style="list-style-type: none"> • provide advice to communities in applying for and implementing their First Impressions Community Exchange • orient the Coordinator to the FICE process • work with Coordinator to keep the process on track and ensure the community completes its commitment to the Exchange Community in a timely manner • provide the guides and questionnaire booklets • identify appropriate exchange communities and develop the match • assist with preparation and/or presentation of reports • attend at the Report-Back meeting • assist with and/or facilitate the community planning mtg to identify priorities and identify action plans • provide on-going support throughout the process
Limited Support Program	<ul style="list-style-type: none"> • orient the Community Coordinator to the FICE process • provide telephone support to communities applying for and implementing their First Impressions Community Exchange • provide advice and recommendations on appropriate exchange communities and assist with brokering a terms of reference between the two communities

1.4 Benefits for Your Community

Many communities in Alberta are finding that they are growing rapidly, while the infrastructure and other community attributes are often advancing at a slower pace. Rapid change can also impact the “face” of the community as the demographics and community structures change. Other communities may find that they are declining in population, and wonder if such a trend could be slowed or reversed. Like most communities, you want to provide a positive, welcoming and inclusive image to visitors. These visitors might be tourists, potential residents, potential business investors, or simply shopping in your community; all are important contributors to your local economic health and growth. Everything and everyone in your community can have an impact on a visitor; the first impression they make can be positive, which might encourage the visitor to return or stay longer, or the impression can be less than desirable, which could decrease the interest of the visitor in returning or starting a business in the community. These impressions can also define a community’s reputation and has the potential to impact the community’s ability to capitalize on opportunities that may arise.

The benefit of the FICE program is that it provides municipalities with a fresh perspective on their communities that is delivered by a fellow community that may be living a similar experience. In turn, the Exchange Community may have some firsthand, practical ideas of how to overcome common barriers.

Another aspect of the FICE exchange is the opportunity for municipalities to develop and champion action plans to address the areas of need and opportunity.

The issue identification and planning resulting from a FICE project will assist communities in prioritizing how they will use the transfer of funds they receive from the Province of Alberta. FICE also provides the platform for ongoing collaboration between municipalities to share ideas and solutions.

Sustainability and inclusiveness are at the forefront for many Alberta municipalities. Many communities are in the process of developing long term visions, sustainability plans and strategic directions. Through the FICE exchange process, your community can develop a plan of action to enhance or build on your strengths, capitalize on new or potential opportunities, learn from other communities and address areas requiring improvement.

There are a number of reasons for asking people from outside your community to do the assessment rather than inviting local residents to conduct a review.

As a resident, it is often difficult to take an objective view of the community you call home. Other benefits of external exchange teams are:

- local residents may overlook positive features that could attract someone to your community or qualities that might come across as undesirable to someone new to the community
- it may be easier for an outsider to provide constructive feedback to community stakeholders on sensitive matters, such as customer service skills or the appearance of properties
- the potential of preconceived expectations leading the assessment may be reduced.

The First Impressions Community Exchange experience can inform other community development and planning activities.

Table 2: Value of the FICE Program

Community	Potential Actions
Community Strategic Planning	<ul style="list-style-type: none"> • identifies strengths and areas for improvement, assets, capacity, priority issues and ensures a commitment to addressing the right issues and opportunities
Municipal Service Management	<ul style="list-style-type: none"> • assess services (information, public facilities, etc.) for visitors to the community
Downtown Revitalization	<ul style="list-style-type: none"> • identifies specific issues, such as signage or parking, that need attention in your downtown
Tourism Planning	<ul style="list-style-type: none"> • identifies local tourism opportunities, strengths and areas for improvement including accommodation, customer service and appeal of attractions • assess specific tourism products – Is the community ready for a festival? Are you creating the impression you want? Are you providing visitors with the services they need?
Community	Potential Actions
Investment attraction	<ul style="list-style-type: none"> •gain a perspective of how a potential investor might view your community
Business Retention & Expansion	<ul style="list-style-type: none"> •provide additional information about the services and infrastructure available to local businesses, to complement a business retention and expansion (BR+E) survey
Quality Service	<ul style="list-style-type: none"> •assessing the effectiveness of a quality service training initiative that local retailers or government offices have implemented

The First Impressions program would not be appropriate in the following situations:

- on its own; it needs to be part of strategic economic development, sustainability planning or inclusive communities process;
- should your community not have the capacity and commitment to respond to some of the recommendations; or

- should your community be less than open to constructive feedback.

The FICE Consulting Team can help you determine whether a First Impressions Community Exchange is the right tool for your community. They can also advise on alternative or complementary community development tools and resources.

2.0 Prior to the Exchange

The first step in initiating a community exchange is to assess your community’s readiness for participation and complete the evaluation form and application process and submit this documentation to the FICE Consulting Team.

2.1 Is Your Community Ready?

Assessing Community Readiness is one aspect of the FICE application process (see application package forms on the AUMA website). In order for First Impressions Community Exchange to be successful in your community, consider the points contained in the following chart. It is important to ensure that these readiness elements are considered throughout all phases of the FICE exchange process.

Table 3: Assessing Community Readiness

Elements	Your Community Readiness
Fresh Perspective	FICE is designed to provide an assessment of your community’s strengths and areas for improvement, from a fresh, outside perspective. <ul style="list-style-type: none"> • Is your community ready to hear an objective assessment of its strengths and areas for improvement? • Is FICE the right community development tool to use at this time?
Strategic Community Development Process	FICE can be a very effective component of an economic development plan, and is best used as part of a broader strategic process, rather than a stand-alone initiative. <ul style="list-style-type: none"> • Is your community conducting a strategic planning process, such as downtown revitalization? • Will the FICE program enhance / support the existing or planned initiatives?
Open to Feedback	FICE provides a participating community with an honest and objective appraisal of their community, as seen through the eyes of a visitor. The exchange report will offer constructive and positive feedback. <ul style="list-style-type: none"> • Are local leaders, residents and business owners and community groups ready to hear and act on constructive feedback (constructive feedback along with positive feedback)?
Elements	Your Community Readiness
Community Commitment & Leadership	<ul style="list-style-type: none"> • Will community and organization leaders commit to helping implement the exchange? • Are community leaders action-oriented and committed to responding to the feedback they receive? • Is there an organization who will take the lead to make things happen? • Do you have representation from the organizations that need to be involved such as the Municipality, Chamber of Commerce, Business Improvement

	Area, tourism association, education, Community Futures Development Corporation, citizens'/residents' groups, industry sector organizations, law enforcement, etc.
Clear understanding of the information your community needs	<ul style="list-style-type: none"> • Have you identified the elements/sectors about your community which could benefit from an outside perspective?
A Coordinator AND an Alternate Coordinator	<ul style="list-style-type: none"> • The Coordinator is vital to the success of the exchange. • Is there an individual in your community (staff or volunteer) who is ready, willing and able to take on a role that is central and vital to the success of the exchange? • Is this individual skilled at organizing, facilitating, training, report writing and presentation, as well as dealing with the media? • Will this individual commit to organizing the exchange, coordinating the team visit, making sure the final report is compiled and sent, and organizing the local report-back meeting and action planning? • Is there an Alternate Coordinator who can take over the project if the Coordinator is unable to complete the project?
A Visiting Team	<ul style="list-style-type: none"> • Can you recruit a diverse team of volunteers representing a variety of perspectives, willing to commit a day to conduct a community visit and to prepare a report? • Will two to three team members be willing to meet with the exchange community to present the report?
A report-back meeting	<ul style="list-style-type: none"> • Are you willing to organize a “report-back meeting” to hear the visiting team’s report and present your report to them? • Is your community open to feedback – both positive and constructive?
Follow-up and Actions	<p>Participating in the exchange alone will have little impact unless the results are shared and acted on. If the community or its leaders are not prepared to commit to follow up, then the community is not ready to implement an exchange.</p> <ul style="list-style-type: none"> • Is your community willing to invest in follow up, communicating and acting upon the results? • Does your community have the resources to develop and implement action plans in response to the Exchange community’s feedback?
Resources and Capacity to implement the program	<ul style="list-style-type: none"> • Are your community organizations and partners willing to cover the costs to implement the program which may include copying of the assessment guide, travel to the exchange community (i.e. gas, meal costs for team members during the community visit, photo processing costs, report-back meeting room and refreshment costs (approximate costs less than \$1,000.00)? (Note: If an overnight trip is chosen, accommodation costs will need to be considered.)

2.2 Your Exchange Community

The following criteria have been used to successfully pair communities:

- population and demographics
- proximity to metropolitan centre or major population centre (*Are your communities both bedroom communities or equally remote?*)

- economy – major industries or employers (*For example, is employment based on tourism or manufacturing or education sector?*)
- distance to major transportation arteries
- common economic issues (*dependence on a single industry, labour force, etc.*)
- unique geological/natural feature (*river, lakes, valleys, etc.*)
- proximity to each other (*within a reasonable driving time to allow for maximum visiting/assessment time and be far enough away so the Visiting Team Members are not familiar with the community*)

Depending on the FICE Support Option you choose to use for your FICE experience, the matching process will be:

- facilitated by the FICE Consulting Team who will identify a similar community with which to conduct your First Impressions Community Exchange
- supported by the FICE Consulting Team who will assist you in identifying your matching community with comparable characteristics based on the above criteria.

The FICE Consulting Team will confirm the match and ensure that both communities are committed to the initiative and have capacity to participate.

Participating communities will be required to complete and sign the **Commitment Form** document and return it to AUMA.

Once exchange communities are identified, the Coordinators will exchange the following information with their exchange community's Coordinator:

- contact names
- addresses
- telephone numbers
- e-mail addresses.

3.0 Getting Organized for the Exchange Visit

3.1 Roles and Responsibilities

Sponsoring Organization Role

The sponsoring organization will identify a Coordinator for the First Impressions Community Exchange program and will support the Coordinator in his/her volunteer efforts. An Alternate Coordinator will also be identified, to help ensure successful completion of the exchange process should the Coordinator be unable to see the project through to completion.

The sponsoring organization will also prepare a budget for the exchange and secure the resources required. (*See Section 3.3 FICE Costs*)

The Coordinator's Role

The Coordinator, working with the Visiting Team of the Participating Community will:

- identify and liaise with an Alternate Coordinator who would be able to take responsibility for the project should the coordinator be unable to complete it
- plan the visit to the exchange community (timeframe, format, etc.)
- build and maintain secure community (e.g., Council) support for the visit
- recruit and orient volunteers for the Visiting Team
- organize the trip to the Exchange Community
- lead the preparation of a written report and presentation summarizing the findings from the visit, for the Exchange Community
- organize and arrange the logistics of Report Back meeting with the Exchange Community and lead the presentation of the Exchange report at the meeting
- coordinate media communications with Community staff, identifying a media spokesperson as necessary
- lead the process for identifying priority items from the report and developing an action plan for each of the priority items
- liaise with the FICE Project Team which facilitates the First Impressions Community Exchange program.

FICE Consulting Team Roles

Depending on the FICE Support Option your community has chosen, the Alberta FICE Consulting Team will provide various types of support.

For example an orientation to the community Coordinator, provide all resource materials (e.g. questionnaire booklets, report templates), and will be available to answer any questions the Coordinator may have through the duration of the exchange process. The Consulting Team may provide advice for report writing, with the aid of sample reports and a report template, but it is the community's responsibility to prepare the report. The Consulting Team can also help to ensure the action plans are implemented through follow-up communication with the Coordinator 3-6 months after the report presentation.

Volunteer Visiting Team Member Roles

The Coordinator will provide the Visiting Team volunteers with a Visiting Team Member Guide and orient them to the FICE process. (A PowerPoint presentation is available to the Coordinator to use in the orientation).

The Visiting Team Member guide includes brief instructions for the visit, and the exchange questionnaire. (See Visiting Team Member Guide).


Visiting Team Members will:

- attend training/orientation meeting(s) in preparation for the visit
- review the team member guide booklet prior to the visit


- complete the team member questionnaire booklet during the visit
- provide support and feedback in the preparation of a written report for the Exchange Community
- if selected, attend the presentation of the report with the Coordinator and/or present the team’s findings to the Exchange Community at an agreed-upon time.

3.2 Format

The format for the visit should be based on discussions with the Exchange Community, as well as volunteer availability and input. Typically the visit can take place within a day. In some cases, communities may wish to do an overnight stay if the distances between communities are more than 3 hours or if there is desire to assess accommodation. However, it is most likely that one day exchanges will occur.

 Most participants in the FICE pilot project felt that they could have used more time in the Exchange Community and that an overnight stay would have been preferred.

Trip Plan	Advantages	Disadvantages
The overnight visit	<ul style="list-style-type: none"> • suitable for communities located more than three hours driving distance apart • provides an opportunity to assess the community’s night life, dining, and accommodation quality and availability • it can also provide the team with more time to meet to review findings and identify gaps yet to be covered during the balance of time spent in the community 	<ul style="list-style-type: none"> • requires more volunteer time • involves accommodation and additional meal costs
The one-day visit	<ul style="list-style-type: none"> • your visiting team will not require accommodation and will be back home the same day • this option is sometimes more feasible for volunteers 	<ul style="list-style-type: none"> • does not allow for an assessment of night life/facilities • does not allow extra time to complete all sections of the questionnaire

 If you are conducting an exchange in a larger community, you may want to consider taking two vehicles for the exchange visit. This would provide greater mobility options for your team in a community where walking between locations may not be practical in such a short time frame.

3.3 Timing

In dialogue with the Exchange Community’s Coordinator, determine whether the visit will be conducted on a weekday or weekend. Note that municipal offices and other organizations you will want to visit may be closed on weekends. Any decision about timing will depend on the services and areas on which the Exchange Community wants feedback.

The Exchange Visits should occur within three to four weeks of each other, unless one or both communities have a particular interest in being visited during a specific season or month (e.g. if the community wishes to know how it looks during the “summer tourist season”).

The report-back meeting should take place within three to four weeks of the last exchange visit, to gain the greatest benefit from the information while it is still fresh in everyone’s mind.

Table 5: Flow Chart of Timing and Tasks

Timing	Tasks
Application: Prior to commencing an Exchange	<ul style="list-style-type: none"> ● Identify local Site Coordinator and Alternate Coordinator ● Identify budget and resources ● Submit application form commitment form ● Community and AUMA sign commitment form
Recruitment and Orientation: 1 to 2 months before visit	<ul style="list-style-type: none"> ● Recruit and orientate volunteer Visiting Exchange Team (5-7 volunteers on average)
Preparing for the Exchange: 1 month before visit	<ul style="list-style-type: none"> ● Conduct pre-Exchange preparation - confirm dates, logistics, equipment, supplies, etc. ● Collect information about the Exchange Community – assign one member of the Visiting Team to source information from the municipal office, economic development corporation, Chamber of Commerce, etc. without letting the Exchange Community know ● Identify 2 community choice questions and submit to the FICE Consulting Team
Preparing for the Exchange: 1 week before visit	<ul style="list-style-type: none"> ● Complete the “Prior to Your Visit” section at the beginning of the questionnaire booklet ● Set time and place to meet on the exchange day and advise the Visiting Team ● Give each Team Member a copy of the Agenda for the day (see examples in 4.1 and Appendix 3) ● Secure camera and digital card or film
Exchange Visit	<ul style="list-style-type: none"> ● While traveling to the Exchange Community, provide Visiting Team members with the questionnaire booklet, assign roles for exchange discussions (see section 4.2) ● Designate the photographers advising them to complete the photo log in the questionnaire booklet ● Travel to community, complete questionnaire and record impressions
Exchange Reporting and Presentation: 3 to 4 weeks after visit	<ul style="list-style-type: none"> ● With assistance of Visiting Team members the Coordinator prepares the report and presentation ● Coordinator liaises with the FICE Consulting Team and the Exchange community’s Coordinator to identify a date, time and place for the report back meeting ● Visiting Team members complete the evaluation forms and return to FICE Consulting Team ● Coordinator and 1-2 volunteers meet with Exchange Community to present report
Action Planning: 4 to 6 weeks after visit	<ul style="list-style-type: none"> ● Coordinator identifies method and participant group that will be used to identify priorities from the Exchange Report and develop the action plan for those priorities ● Conduct action planning process (FICE Consulting TEAM will facilitate the process if desired)

	<ul style="list-style-type: none"> • Submit action plan to FICE Consulting Team
Follow Up and Evaluation: 3 months after visit	<ul style="list-style-type: none"> • Coordinator completes the Follow up Form/Evaluation and submits to FICE Consulting Team

Supply Checklist for Community Exchange Visit:

- Maps
- Visiting Team Member Guides
- Extra pens and pencils
- Cameras (and film if needed)
- Photo log (in the Visiting Team Member Guide)
- Cell phones to make calls among team members during the visit, especially if visiting a large community. If team members do not have a cell phone or access to one, it is important for the Coordinator to arrange this in advance.

Digital cameras are required for the exchange, the Coordinator should check with the volunteer Exchange Team Members who has access to a camera and who will require one in order that the Coordinator can make appropriate arrangements. Volunteers using their own camera should ensure that they email the photos to the Coordinator immediately following the Exchange or the Coordinator could choose to download all photos onto his/her lap top during the return trip.

3.4 FICE Program Costs

The sponsoring organization will allocate a budget to reimburse volunteers for the following expenses:

- travel (*gas, accommodations and additional meals if overnight*)
- meals.

In addition to the exchange visit costs, there may also be costs for:

- copying the questionnaires (Visiting Team Member Guides)
- meeting room rental (*for report-back meeting*)
- photo developing
- printing and copying the report

It is anticipated that the costs of participating in the First Impressions Community Exchange program would be less than \$1,000.00 per community including in-kind support such as municipal staff or volunteer time if the one-day visit option is chosen.

Should your community choose a two day trip plan additional costs for overnight accommodation and additional meals should be added to the budget.

3.5 Recruiting Visiting Team Members

The Coordinator recruits volunteer exchange team members who will travel to the Exchange Community. The size of your team depends on the size of the other community. If you are visiting a

community with a population of 1,500 or fewer, you may only need four people on the visiting team. Communities between 1,500 and 10,000 require between 5 and 7 team members to cover all areas of interest.

Before beginning to recruit volunteer team members, decide how they will be reimbursed for their expenses, such as lunch and mileage to the Exchange Community. Select team members who represent a variety of perspectives in your community. It is important that they are not familiar with the community to be visited.

The Coordinator should query the Visiting Team Member's familiarity with the community they will be visiting as well as their availability to participate. Their varied perceptions will enhance the assessment process and their participation could broaden interest in your own community and economic development efforts. There are no "experts" in this process. Each person's perceptions and first impressions are valid.

Recruit volunteers who are outgoing, can make an objective assessment, and can provide constructive feedback to the Exchange Community.

It is important that the Visiting Team Members take their job seriously; the visit involves a critical assessment of the exchange community, so team members must be energetic, efficient and dedicated to the task. Look for volunteers who have report writing and presentation skills and are comfortable using a digital camera.



Incorporating people into your visiting team who come from diverse background will mirror the heterogeneous make-up of most communities, and should result in more meaningful feedback.

Your visiting team could include a combination of the following:

- business owner
- local government official
- teacher/someone from the education sector
- professionals (physician, dentist, lawyer, architect)
- realtor
- new Canadian
- newspaper editor or reporter
- banker
- community volunteer
- retiree
- parent
- young single adult
- high school student
- senior citizen

Try to recruit volunteers who are not familiar with the exchange community so that they can truly offer a first impression.

When recruiting, clearly communicate:

- the time commitment
- what you expect from the volunteers
- roles
- the learning opportunity that this program offers to them
- how they will be reimbursed for costs they might incur

4.0 The Exchange Visit

While travelling to the Exchange Community:

- Review the entire Visiting Team Member Guide (all team members should have done this previously on their own).
- Use travel time to form small groups and plan a strategy for collecting information to complete the Visiting Team Member Guide.
- Assign sites (such as the downtown, library, schools, real estate offices, parks, banks, shopping areas, or housing) to team members, who will review the corresponding section of the questionnaire (Visiting Team Member Guide). More than one team member can visit each site (this is actually desirable), but ensure that all sections of the questionnaire are covered. Please note that for smaller communities in particular, some of the questions may not be applicable. (for example, small centres may only have one or two entrances into town, not four)
- Confirm team members' roles (see Section 4.2).
- Remind team members to be discreet when asking questions. The visit is more effective if residents don't know the community is being evaluated.
- Remind team members to identify both positive and areas for improvement features of the community.

During the visit:

Coordinators are to:

- Encourage team members to split up during lunch (or dinner) so a variety of dining establishments can be evaluated. Avoid fast food establishments.
- Remind team members to save receipts if lunch expenses are incurred.
- Agree on a time and place to meet, before team members separate into small groups.
- Encourage each individual to complete his/her questionnaire so that everyone's first impressions are captured.

Visiting Team members are to:

- As a group, identify the main approaches to the community. Each team member will record his/her observations of each entrance.

- Drive through neighbourhoods, recording observations in the housing section of the questionnaire.
- Collect written materials such as newspapers, tourism brochures, bulletins, and community calendars.
- Look for positives as well as areas requiring improvement. If you see a situation that should be addressed, try to think of a possible remedy.
- Look for things that you could implement in your own community.
- Consider all perspectives are valid; there is no wrong way to do this, remember, two people may see the same thing and react differently –that’s OK!
- Take individual notes before you forget your thoughts on an area and before discussing with other team members. Your individual first impressions count.
- Take pictures – use the photo log in the Visiting Team Member Guide.
- Regroup partway through the visit to identify any sections of the questionnaire (Visiting Team Member Guide) that still need to be completed.

On the way home or immediately after returning home:

- Team members should expand on their individual comments in the questionnaire (Visiting Team Member Guide).
- Team members should discuss plans for preparing and presenting the team’s report to the Exchange Community.
- Team members should provide their completed questionnaires to the Coordinator.
- The Coordinator must stress the importance of completing the questionnaire (Visiting Team Member Guide) within a day of the visit, while observations are still fresh in everyone’s mind.
- Ensure that photos are provided to the Coordinator following the Exchange

Table 6: Sample Itinerary for Exchange Visit

One Day Itinerary		Two Day Itinerary	
Time	Activities	Time	Activities
8:00 am	Meet in home community and prepare to travel to Exchange Community	8:00 am	Meet in home community and prepare to travel to Exchange Community
10:30 am	Arrive in Exchange Community and complete “5-Minute Impression” drive through to assess community entrances, residential and industrial areas	12:30 pm	Arrive in Exchange Community and complete “5-Minute First Impression” drive through to assess community entrances, residential and industrial areas, have lunch.
11:30 am	Split up and assume roles to assess other areas: municipal services, tourist attractions, etc. Timing of visits should be based on hours of operation.	1:30 pm	Split up and assume roles to assess other areas. Visits should be timed by hours of operation, i.e. municipal services will likely close by 4:30 p.m. so may be visited earlier in the afternoon or in the morning.
12:30 pm	Enjoy lunch and assess the downtown and retail areas	6:00 pm	Enjoy supper and assess the downtown and other areas
1:30 pm	Continue to explore the community, gathering information from residents and shop owners.	7:00 pm	Continue to explore the community and other evening entertainment/recreation areas.
3:30	Meet to review progress – are all required	8:30	Meet to review progress – are all required

pm	sections of the Questionnaire completed?	pm	sections of the Questionnaire completed?
4:30 pm	Complete assessment	Over-night	Stay in local accommodation; try to include different types of accommodation
5:00 pm	Tour community for photos	9:00 am	Complete assessment and tour community for photos, visit municipal and retail areas not visited yesterday.
6:00 pm	Travel home	12:00 pm	Travel home

Include the following information on your Agenda

- location, date and time of the Exchange
- meeting place/pick up location
- coordinator contact number
- supplies needed

4.1 Team Member Roles

To assess the exchange community from various perspectives, team members can assume different roles during the visit.

Consider the following examples of roles (The role you choose will determine some of the places you visit and questions you ask):

- new resident, or someone considering moving to the area
- someone trying to locate property for development
- someone interviewing for a job in this or a neighbouring community
- someone looking to set up a business in the community
- tourist travelling through who has stopped to explore the Exchange Community
- shopper
- senior citizen considering retiring in the area
- student planning to attend college here, etc.

Your questions might include:

- “I’ve never been here before. What is there to do for recreation?”
- “How do I get to the library (or internet café or tourist attraction...etc.)?”
- “Which restaurant would you recommend here? Where would be a good place for lunch?”
- “My family and I may stay here while passing through on our way to a wedding next month. Can you recommend a place to stay?”
- “I’m thinking about moving to a smaller (larger) community, maybe something like this community. How would you rate the schools? What can you tell me about available housing?”
- “My parents have thought of moving to a smaller community, what services and amenities are available for seniors?”
- “Are there local business associations that I might join if I were to open a business here?”
- “Where would I find a list of industrial or commercial buildings for sale or lease?”
- “Are commercial building sites available? Do commercial building sites have services such as hydro and water?”
- “I have half a day to spend in this area... what would you suggest I/we do?”

5.0 After the Visit

5.1 Preparing the Findings of your Visit to the Exchange Community

Once you have completed the Exchange Visits, the Coordinator (with the assistance of Visiting Team Members) will complete a report that summarizes the comments from the entire team. Electronic templates for both a written report and slide presentation are available for your use.

Please ensure that the templates provided are used to ensure a consistent approach to the report, feedback session and presentation which will be made to the partnering Exchange Team within three to four weeks of the community visits.

5.1.1 Preparing the Written Report

This is perhaps the most time-consuming part of the whole First Impressions process. The time required to write the report varies, but will take a few hours and in most cases, **from 1-2 work days**.

This will depend on the amount of discussion among team members and whether or not photos are integrated into the written report. Summarizing multiple comments from team members and coming to consensus on recommendations may also require considerable time.

It is also helpful to include some of the pictures taken during the visit in the report to capture attributes that were explained or commented on in the assessment.

The report can be prepared using a few different approaches.

Table 7: Examples of Report Writing Approaches

Approach #1	<ul style="list-style-type: none">• Using the report template, the Coordinator prepares a draft report based on completed Questionnaire booklets collected from Visiting Team Members at the end of the trip.• The Coordinator then circulates the draft report to team members for comments.• If possible, the Coordinator should facilitate a team meeting to finalize the report.• This approach will be the most efficient use of time.
Approach #2	<ul style="list-style-type: none">• The Coordinator facilitates a team meeting, at which members verbally share their observations for each section of the questionnaire, while one member types what is said, directly into the electronic report template• Using the report template, the report is then refined by the Coordinator and circulated to team members for review.• At a team meeting the report is reviewed and finalized.• This approach will require considerable more time commitment from all participants, and may not be practical in certain situations.

The report should include a cover letter that provides a profile of your visiting team, the date the visit took place, the amount of time spent in the community, a general summary of the visit, and contact information. Include some photos from the visit in the report,

but remember that each photo will add to the size of the electronic report file, so only include those that are necessary for illustrating key points.

Once the report is finalized, a copy of the report will be provided to the Exchange Community Coordinator at the report back meeting. Reports will **not** be circulated to the Exchange Community in advance.

5.1.2 Preparing the Presentation

The Coordinator and one to two members from your Visiting Team will prepare and make a slide presentation to your Exchange Community. Recruit volunteers that are comfortable presenting reports and providing constructive feedback. It is also important that the presenters be familiar with the contents and background to the report, in case there are questions from the exchange community's visiting team about any specific observations during the presentation.

The slide presentation is a visual version of the written report and will be developed using the digital pictures taken during the visit. Include positive images to help the community feel proud of their assets and achievements, along with photos that show areas and issues that need to be addressed.

An electronic slide show template is provided for your use for the slide presentation. Use two or three bullet-point slides for each section of the questionnaire, along with the photos. Provide an electronic copy of the presentation to the Exchange Community as part of your report. They will be able to use the pictures as "before" pictures for reports on projects that they undertake as a result of the feedback provided.

5.1.3 Guidelines for giving and receiving constructive feedback

Providing constructive feedback is vital to the success of the exchange. Constructive feedback is not the same as advice:

- It is descriptive rather than evaluative. It is intended that constructive feedback be non-judgemental. Provide information that helps the Exchange Community improve, while minimizing critical comments that would lead to a defensive response. At the same time, most communities appreciate frank, honest comments rather than "sugar-coated" observations.
- Provide specific feedback rather than general, but do not identify businesses by name, especially if the feedback is not complimentary. For example, say "the sales staff at a local retail (clothing) shop did not acknowledge our presence in the store" instead of "the sales staff at Jones Family Fashions were rude."
- Focus on things that can realistically be changed.
- Give feedback that is accurate and based on observations.
- Provide positive feedback first, and then describe areas that you observed needing attention. Ensure that the feedback message is clearly understood. Focus on the value of your message to the receiver.
- Use phrases like – "From our/my perspective; we observed that..." as opposed to "You don't have, you should have," etc.

Receiving constructive feedback is also part of the exchange process. When you are receiving feedback:

- Listen to the whole message - for positive feedback and suggestions for improvements.
- Be open. Listen closely without making excuses. Do not explain, defend or deny and if clarification is needed, ask questions.
- Ask for clarification and allow time to absorb the information. Recognize that a community cannot “grow” unless it is open to constructive feedback.

5.2 Sharing the Findings of your Visit to the Exchange Community

The report-back meeting is an opportunity for you to hear from the team that visited your community, and to provide your feedback to the community that you visited. Ideally, the meeting should occur within three to four weeks of the last exchange visit.

Sample Agenda - FICE Report Back Meeting

1. Welcome, introduction of FICE (introduce sponsoring municipalities, coordinators and team members present)
2. Determine which community will begin
3. Presentation by Exchange Team #1 (verbal and slide show)
4. Questions about key points in report or presentation
5. Review key observations from Exchange Team
6. Review learnings that Exchange Team members had that could be applied in their own community
7. Presentation by Exchange Team #2 (verbal and slide show)
8. Questions about key points in report or presentation
9. Review key observations from Exchange Team
10. Review learnings that Exchange Team members had that could be applied in their own community
11. Action Planning (summarize key issues and set stage for action planning)

5.3 Communicating the Results

Communicating the results of the community exchange with the broader community (after the report back session has occurred), including all stakeholder organizations, local businesses and people who are in leadership positions is the first step of igniting change and action back in your own community. By increasing public awareness of the exchange, as well as the recommendations made by the visiting Exchange Community, you can gain support for implementing action that will address areas needing improvement.



It is important to defer to and work closely with the Communications Representative with the Municipality and other stakeholders to effectively plan the engagement of the community and media.

Communication strategies might include:

- Local media (newspaper, radio, TV, etc.)
- Municipal website
- Newsletters
- Print media such as flyers, invitations, letters, updates, etc.
- Information sharing at meetings such as Chamber meetings

Regardless of the approach that is used, your marketing and communication material needs to be clear and concise so that people will read, hear and understand the key message. It should motivate people to get involved.

As early as possible in the project, consult local representatives from the media, marketing and graphic design businesses, art and public speaking organizations, and educational organizations to help with communicating the message and moving the action plan forward.

Working with the Media

There are five ways to market a story to the media:

1. Telephone interview with a reporter
2. Face-to-face interview with a reporter
3. Media release
4. Invite the media to attend public events related to the Exchange
5. Media conference

Media Release

It is highly recommended that you work closely with your municipal communications department to develop this release. A sample media release is provided in Appendix 3.

Media Interview Tips

Ensure that you have the authority to speak on behalf of the Project, or Sponsoring Organizations prior to participating in interviews

Have a dialogue with the reporter prior to going live or being recorded.

This will provide you with some insight about this reporter's style. At this time, you can also make clear what it is you are about to share.

Talk only about what you know.

A reporter or interviewer may want you to talk about a topic outside your area of interest or expertise. If you're not knowledgeable about the topic, let the reporter know right away.

Emphasize the positive.

Prepare for the possibility of a reporter focusing on the negative aspects of the report about your community. Try to refocus the interview on the positive findings of the report and how the community can use the findings to make improvements.

Use time effectively.

A good technique to use when you are contacted for an interview and are not properly prepared, is to ask for the caller's contact information and call back once you are ready. Even if you're sure about the response you want to give, say you'll call back. By doing this, you have time to compose yourself, double-check your facts and organize them.

Plan before you speak.

Know your audience. Ask what subjects the reporter wants to cover and how long the interview will be. Assemble your material into short notes and make sure you've got the facts straight. Prepare notes to support you in your interview.

Don't even guess.

If you're unsure about something, don't guess. Offer to check the facts and call back right away. Guesswork does nothing for your credibility or your organization's reputation.

Give the facts, just the facts.

Offer information, not opinions. Your opinions would not be appropriate in this situation. Remember, you are a spokesperson for the First Impressions Community Exchange initiative.

It's always "on the record".

People too often get caught in the "off the record" trap. If you don't want something printed or broadcast, don't say it.

"No Comment" is a comment.

"No comment" has become a comment in itself. It gives the wrong impression. Avoid it. If you have an especially good reason not to comment, say: "I'm sorry; I can't give you that information right now."

Honesty is the best policy.

Protect your credibility and your organization's by being honest with reporters.

Cultivate your contacts.

Ask media contacts about deadlines and respect them. Keep reporters informed. Praise their good work. Thank them in writing or by phone for covering your event/story. Remember, they will help you deliver your message to the general public.

5.4 Recognition and Follow-up

Remember to send thank you notes to your community's volunteer Visiting Team Members and to the Visiting Team from the Exchange Community.

6.0 Implementing Feedback and Planning for Community Action

The First Impressions Community Exchange does not end with the Visiting Team reports. It is critical that each community consider the observations provided by the Exchange Community and determine the next steps to address any identified shortcomings or opportunities.

Each community should channel the feedback and recommendations from the Exchange Community report into a formal action planning session. This should be done as soon after the report presentation as possible to ensure that the issues are addressed or acted on while they are still fresh in everyone's mind.

Participation at the action planning meeting should include the FICE Visiting Team members from your community, representatives from sponsoring municipality and organization(s) as well as additional representatives from business associations, the municipality and residents at large.

It is important for the sponsoring organization and FICE Visiting Team to identify key contacts that should be involved in the action planning phase and to personally invite/recruit these individuals to participate. For example, if there were concerns about housing for seniors, it would be important to include senior services organizations.

During the Action Planning meeting, consider:

- Which actions could be realistically carried out in the short term with the resources available?
- What actions require planning to implement in the medium to long-term
- Which actions result in the biggest impact?
- What actions complement or build on other projects in the community?
- How will these actions affect other groups/events/projects in the community?
- Which actions could be delegated to other community groups?
- Which actions build on the strengths or resources you have?

Use this **sample action-planning exercise** and these questions and others to guide you in developing your list of priorities for your action plan.

1. As soon as community members have reviewed the final report, organize a meeting to discuss the issues identified. It may be helpful to have someone act as a facilitator for the meeting. The FICE Consulting Team can assist here.
2. At the meeting, work through the report and identify the issues needing action, both now and in the future. If you have a large enough group, break into smaller groups of 3 to 4 people to discuss different sections of the report. Record the recommendations on a flip chart so they can be seen by all participants.
3. Bring the small groups together and have each group share what they determined as "action" items. There should be an opportunity to discuss differences of opinion between the groups and to reach agreement on the recommendations.

4. Prioritize the action items and determine who in the group or the community is best equipped to implement the action plan.
5. To set priorities for action, the following techniques may be of assistance:
 - Have each participant rank the items using a numerical scale with 5 being the most important and 1 being the least important. The numbers assigned to each action are then totaled to identify the group's priorities.
 - Provide participants with a number of dots and have them assign one or more dots to the action items. Priority will be determined by the number of dots received for each action. This and the above method are commonly referred to as the "nominal group technique".
 - Identify actions that can be accomplished quickly and at minimal cost. This provides the community with some quick wins and provides motivation to implement more complex or costly actions.
 - Classify actions by "must do", "should do" or "could do". A sample chart is included in Appendix 4.
 - Hold a group vote for each action, or
 - Discuss actions and their relevant importance until consensus is reached on priorities.
6. Develop detailed action plans for each priority area/item. First, identify the small tasks or activities that are needed to complete each priority. Try to visualize or brainstorm the various things that will need to be done to get from where you are today to where you want to be. List the steps in logical sequence. For successful implementation, it is important to assign realistic completion dates and responsibility to a specific person or organization. Identify other partners or stakeholders that may need to be included.

Developing detailed action plans may need to be completed at a subsequent meeting and/or be assigned to smaller working groups. If this is the case, ensure that a specific meeting or completion date is established.



An example of how to develop an action plan is included below, and an Action Planning Worksheet is included in Appendix 4.

Funding to assist with action plan implementation may be available through a variety of public and private sources. The FICE Consulting Team can help to identify potential funding programs that may be applicable.

7. Before closing the meeting, set a date for a follow-up meeting and a system to track progress of the action items.
8. Report results from each follow-up meeting to the community through the local media and other sources. Invite additional community members to participate in the implementation of actions.

9. Consider organizing educational seminars/workshops to address some of the areas for improvement or assets identified through First Impressions.

- After visiting the Exchange Community in the fall, the Visiting Team suggests that the community’s heavily-travelled southern entrance could be more inviting and should highlight the community’s popular Summer Art and Folk Music Festival.
- The host community discusses the issue and concludes that the community does a good job with the southern entrance during the summer season, but there is room for improvement in the off-seasons. They develop this action plan.

Table 8: Sample Action Plan

Action	Completed	Priority & Timing		
		Short	Medium	Long
Develop a theme for the event and promote a western experience to targeted markets	<input checked="" type="checkbox"/>			
Improve the appearance of the community’s south entrance using it to promote adventure tourism in the off-season				
Develop an agricultural-based industrial park using the open land at the western end of the county				

Task	Time Line	Who	Actions	Evaluation Measure
#1	7 Days	Art	Contact the municipality representative to determine the process for community entrance beautification and signage	Call made, information known within the week.
#2	21 days	Joanne	Meet with the individual responsible and form a working group with interested citizens	Meet with municipality Working group established
#3	90 days	Working group	Explore possibilities for off-season beautification, new signage, and funding source	Options developed Budget in place
#4	30 days	Working group	Present preferred option to council	Municipal approval
#5	60 days	Municipal or community group	Municipal or community group implement the recommendations	Beautified southern entrance Signage promoting the park year-round

Coordinating Action Plans

Your sponsoring municipality should coordinate all action plans, ensuring that projects:

- are distributed across a cross-section of community organizations;
- link to each other and support the broader community development plan or municipal sustainability plan;
- have realistic completion dates;
- are adequately resourced (human and financial), and that these resources are coming from a variety of contributors;

- have involvement from everyone that needs to be involved or has a “vested” interest; and
- are implemented, evaluated and reported on.

Once the action plan has been implemented, the sponsoring organization should work with the broader community to identify further actions to contribute to and build on community assets.

Celebrating success

It is important to provide updates to the community on the actions undertaken as a follow-up to the First Impressions exchange. Recognize those who have completed tasks and celebrate what has been achieved.

7.0 Follow-Up Evaluation

The FICE Consulting Team requires participants to provide feedback on the resources and services provided, in order to ensure that the program is as effective as possible for participating communities.

Evaluating the First Impressions experience is also important as a way for you to understand the extent to which the exchange was a good use of local volunteer/staff time and resources. In addition, if you have received funding from a sponsoring organization or from the local Council to conduct the exchange, you will also need to report on how the funds were used and what was achieved.

Using the evaluation forms provided by the FICE Consulting Team, determine how visiting team members feel about the First Impressions process. Three months after the Exchange, Coordinators also complete a Follow-Up Summary and submit this to FICE Consulting Team for follow up.

8.0 Appendices: Guides & Resources

Appendix 1: Preparing for Exchange Checklist

Appendix 2: Exchange Itinerary

Appendix 3: Sample Media Release

Appendix 4: Action Planning Resources

Appendix 5: FICE Consulting Team Contacts



First Impressions Community Exchange
A Stepping Stone on the Path to Community Sustainability

Preparing for the Community Exchange Checklist

This checklist has been developed to assist Coordinators in preparing for the FICE exchange.

<i>Six Weeks to Two Months before the Exchange:</i>		
Task	Comments/Notes	Completed
✓ Select the Coordinator and Alternate		
✓ Determine how the Visiting team members will be reimbursed		
✓ Recruit volunteer Visiting Team members		
✓ Orient volunteer Visiting Team members (including a detailed review of the Questionnaire and preparation for roles during the visit)		
✓ Determine what format and trip plan will be used		
✓ Identify the 2 Community Choice questions		
✓ Complete the Visiting team contact form below		
✓ Confirm date and location of exchange with Visiting Team members		
✓ Coordinate any travel plans		
✓ Gather some general information about the exchange community		

One Week before the Exchange:		
Task	Comments/Notes	Completed
✓ Complete the "Prior to Your Visit" section at the beginning of the questionnaire		
✓ Confirm time and place to meet on the exchange day		
✓ Give each team member the Itinerary for the day		
✓ Distribute the questionnaire booklet and ask team members to review and familiarize themselves with the sections and questions		
✓ Assign roles for the exchange		
✓ Secure digital or film cameras (buy two or three rolls of film for each film camera; ensure batteries are charged for digital cameras.		
✓ Designate photographers and remind each photographer to complete the photo log in the questionnaire booklet		

Supplies	Completed
✓ Questionnaire booklets	
✓ Maps	
✓ Clipboards to use for writing in the car	
✓ Extra pens and pencils	
✓ Cameras (and film if needed)	
✓ Photo log (in the questionnaire booklet)	
✓ Cell phones to make calls among team members during the visit	

Coordinator Contact Information:		
Information	Coordinator	Alternate
Name		
Phone		
Phone		
Email		



First Impressions Community Exchange
A Stepping Stone on the Path to Community Sustainability

Community Exchange Itinerary

Date of Exchange: _____ Community: _____

Starting Out Meeting Location: _____

Address: _____ Pick Up Time: _____

Coordinator Contact Name: _____ Cell phone: _____

Time	Details
	Meet at specified Starting Out (Pick Up) Location in Home Community
	Travel to community: <ul style="list-style-type: none"> • Review itinerary for the exchange visit • Review questionnaire and tasks • Assign roles for the visit • Confirm location and time to meet for return trip
	Arrive in Exchange Community
	Complete “5-Minute First Impression” Drive through to assess community entrances, residential and industrial areas
	Split up and visit areas based on assigned role to assess other areas: municipal services, tourist attractions, etc. Timing of visits should occur within hours of operation
	Enjoy lunch (or supper) and assess the downtown and retail areas
	Continue to explore the community, gathering information from residents and shop owners.
	Meet to review progress – are all required sections of the Questionnaire completed?
	Overnight (if applicable)- stay in different accommodation types
	Complete Assessment, tour community for photos
	Travel home <ul style="list-style-type: none"> • Discuss and merge your thoughts while fresh • Provide your documents to the Coordinator • Determine who will do the presentation • Discuss meeting date to prepare the report
	Arrive home

Sample Media Release for Report Back Meeting

_____ Participates in First Impressions Community Exchange (Name of Community)

Residents of (Name of community)_____ will have a chance to see our community through the eyes of first-time visitors as part of Alberta's "First Impressions Community Exchange." This project is sponsored by AUMA and the Government of Alberta. On _(date)_____, a group of community representatives from (name of exchange community)_ paid an unannounced visit to (name of community)_ to offer an outsider's perspective on our community. We reciprocated by sending a similar delegation to _____ on (date).

The Exchange helps communities to see themselves the way tourists, prospective businesses, relocating families, and non-local shoppers might see them. Their first impressions of a community have a strong influence on their decisions to relocate to or shop in the community.

"After you've lived in one place for awhile, you sometimes take for granted the things that attract people to your community," says __ (Project Coordinator's name)_____, of _____. Or you may be unaware of aspects of your community that may be unappealing in the eyes of outsiders. The exchange gives a community an objective assessment of its strengths and weaknesses, and gives participants a chance to gather ideas from other communities dealing with similar development issues."

Results of the First Impressions Community Exchange will be presented at a public meeting scheduled for ___ (date, time, location)_____. All are invited.

If you have any questions about the exchange, contact ___ (Project Coordinator)_____ at ___ (phone number)_____.

Action Planning Resources

The following tools can be used to assist with the establishment of priorities and the development of action plans.

A: Nominal Group Technique for Establishing Priorities

What is it?

- a rank ordering of ideas/actions;
- a statistically derived decision based upon individual ratings.

The technique is accomplished by using:

- a numerical rating system, e.g., assigning items a priority where the most important item receives a value of 5 (if there are five items) and the least important receives a value of 1; or
- a visual rating system, e.g., assigning items a priority through the use of sticky dots or check marks on the paper e.g., participants are provided with a specified number of dots or check marks and are asked to place them on the items that are of the greatest priority; one or more dots can be assigned to an individual item. The items with more dots or check marks indicate the higher ranked areas for attention.

When do you use it?

- when there are many options to choose from;
- when the group wants to determine the importance of all items; and
- to help large groups make a decision.

How do you use it?

- list all the items on a flipchart;
- theme the points that seem the same or very similar
- participants individually assign a priority ranking to the identified items;
- the individual rankings are recorded on the flipchart;
- the rankings are totalled for each of the items/actions;
- the item that receives the greatest number of “votes” is the top priority; the item that receives the least number of votes is the lowest priority;
- action items are re-ordered according to the priority level that it received.

B: “Must Do, Should Do, Could Do” Priority Setting Worksheet

A Method For Setting Priorities		
(A) “Must Do”	(B) “Should Do”	(C) “Could Do”
Record action items that the working group feels must be implemented.	Record action items that the working group feels should be implemented.	Record action items that the working group feels could be implemented.

C: Pair Share for Establishing Priorities

What is it?

- a technique that allows individuals to think about their own ideas/opinions before sharing them with the larger working group (introspection);
- a technique that helps individuals to focus and express their concerns;
- allows for more in-depth discussions than would happen in a large group.

How do you use it?

- write the question on the flipchart;
- provide participants with time to formulate their ideas/response individually;
- have participants divide into partners and share their responses;
- the partners may use their individual responses to create a new one;
- each pairing shares their report with the larger group;
- a discussion follows to reach consensus on actions and the priority assignment.

D. Consensus

What is it?

- a method for making decisions that all group members can live with and support;
- it is usually more successful in a small group (8 or less);
- a decision-making technique that allows for persuasion rather than coercion.

How do you use it?

- state the reason/focus for the discussion, e.g., how would you rank these five items in terms of priority?
- ask for a recommendation and the associated rationale, i.e., have someone provide a priority ranking for the actions and explain why they have ranked the items in that order;
- have the group discuss the recommendation; everyone's opinion, knowledge and skills should be heard;
- ask for consensus, e.g., should we accept this recommendation?
- if everyone is not convinced, then ask for another recommendation and repeat the process until a decision is reached.

Action Planning Worksheet

An Action Planning Worksheet needs to be completed for each Priority Action that is identified.

Identification of the individual steps that are required to complete the priority action can be identified through a brainstorming exercise.

Brainstorming

What is it?

- a method of quickly generating a lot of ideas, free of criticism and judgment
- a process of encouraging creative and "out of the box" thinking as one idea often spurs another.

How do you use it?

- record the question on a flipchart; ensure that everyone has a clear understanding of what is being asked;
- challenge participants to be creative and think in new ways while breaking away from “what we’ve always done”;
- use your imagination and build on ideas provided by others;
- allow a few minutes of “thinking” time;
- record ideas on a flipchart so that they can be easily seen by all; there are no bad ideas;
- discussion and evaluation does not occur during the initial brainstorming exercise;
- provide clarification of idea as required;
- when ideas have stopped, provide some additional thinking time; the brainstorming exercise will take between 5 to 20 minutes depending on the complexity of the topic;
- discuss, provide clarification and build on each idea following the second brainstorm;
- combine ideas that are similar; and
- finally, evaluate the ideas and reach agreement on the best ideas/actions.

Action	By Whom	Deadline	Resources & Support		Potential Barrier(s)	Communications Plan	Evaluation
			Available	Needed			
What needs to be done?	Who will take the lead?	By what date will the action be done?			What individuals or organizations might resist? How?	What individuals and organizations should be informed re: this action?	What will successful implementation look like?

FICE Consulting Team Contacts

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