

CHAPTER 2 HOW THE PLAN WAS DEVELOPED

Launching the Planning Process

In the beginning there was no road map, no prescribed way of developing a community driven poverty reduction plan. The Northwest Area Foundation provided the edges of a six-sided box for the planning process by establishing the six criteria. The community was invited to design the interior of the box.

Representatives from the Foundation introduced the planning project to each of the four regions during November and December of 2001. The first meeting was called by the Foundation to introduce interested individuals, communities, and tribes to the planning opportunity. Another meeting was scheduled for December in Great Falls to set the cornerstones for the acceptance of the grant, where representatives from each tribe and county would be present. It was at this meeting that the group formally agreed to the Foundation's proposal. The group chose Bear Paw Development Corporation as its fiscal agent and selected representatives to act as liaisons between the Foundation and the Project.

The Start

The newly formed group called itself the Northcentral Montana Community Ventures Task Force. An Executive Committee was elected by the participants, which had representatives from three sub-regions of the planning area and each reservation.

The next meeting at Browning was the first of a series of meetings intended to build awareness and trust in the planning process, while acting as forums for telling the stories and describing the issues connected with poverty across the region. The meetings held on the reservations were particularly memorable in that the Tribal Council and elders were usually present extending their welcome, asking their staff to attend and providing input to the planning process.

Three additional meetings were held in Fort Benton, Fort Belknap, and Conrad. Attendance at each meeting ranged from 26-48 people with a total of 124 people participating in this early stage of development. A core group of participants attended each event. As the stories of poverty in communities across Northcentral Montana began to unfold, people became increasingly aware of the tremendous range of needs and issues associated with poverty. The complexity of the task at hand seemed daunting. The group grappled with a myriad of possible approaches to secure a ten-year poverty reduction plan from dividing the grant by county and tribe to hiring staff to manage the planning process.

During the early phase of the project, the core group was increasingly dedicated to making an exciting opportunity into a comprehensive ten-year plan to reduce poverty in all corners of the region. With the image of a completed plan in mind, the Task Force decided to look for assistance in taking its next steps from the Montana Consensus Council. This unit of the Governor's office helps citizens and officials build agreement and resolve disputes on natural resources and other public policy issues.

At the Task Force Meeting held at Fort Belknap, the Montana Consensus Council helped the group create a structure for effectively tackling the community driven planning process. During the meeting there was debate about whether the group needed additional expertise to carry out the planning process. The debate was centered on whether the project should be carried out by existing sub-regional groups, many of which were already involved with the project, or whether outside consultants experienced in community planning processes would provide neutral expertise to guide the project. By the end of the meeting, the Task Force had asked the Consensus Council to:

- Develop a work plan and ground rules to guide the Task Force,
- Facilitate meetings of the Executive Committee and Task Force through May 2002, and
- Provide a methodology to review proposals submitted by potential consultants.

The Council outlined a set of agreements and understandings related to roles and responsibilities, ground rules, and decision-making processes. These agreements and understandings would serve as the foundation for further refinement as the selected consulting team began its work. The Council also assisted the Task Force in creating the framework for a Request for Proposal for consulting services that was announced in April of 2002.

Seven proposals were received by early May and three firms were invited to interview with members of the Executive Committee in early June. The Executive Committee chose Strategic Learning Resources from Langley, Washington as the lead organization of a team of consultants¹ to guide the development of the plan. With the selection process came momentum and excitement about energizing a community driven planning process to reduce poverty in Northcentral Montana.

Consulting Team Philosophy of Community Change

The best strategies for community change come from within the community.

Build capacity for engagement and leadership through education and direct involvement.

Create safe ways to find common ground.

Repeatedly involve the broader community during the planning process.

Communication, information exchange, and dialogue are essential to lively and productive planning efforts.

Document the stories, process, and plan as they emerge.

NWAF Criteria

Learning and adapting in response to new knowledge and changing circumstances

¹ This team included two Montana planning consultants, Applied Communications and Cossitt Consulting, who provided substantial local support. A more complete description of the Consultant Team is found in Appendix A.

Creating the structure for the planning process

In July of 2002, the consulting team from SLR toured the region, learning quickly about the vastness and complexity of the area. During their tour, they met with and interviewed each of the 13 Executive Committee members in an effort to learn about the early phases of the planning process and gather perspectives about what would assure the success of the project. The information gathered from the interviews was intended to provide the consulting team with a 'jump start' for the aggressive planning schedule and lay a clear direction. From this emerged the message that success in June of 2003 would be to:

- Bridge the chasm between communities – Indian and white, Great Falls and rural communities
- Have both regional and local strategies, that are inclusive and comprehensive, as well as, innovative and sustainable
- Have the synergy, the connections to continue working together – even without NAAF funding

To effectively launch this new phase of the planning process, the Executive Committee put a new structure to the process, which was followed throughout the next year. The structure was designed to assure that participation was invited, the process always moved forward, and the slow process of building trust and respect, as well as, collaboration between communities and individuals would gather speed. Core elements of the new structure were:

- The Task Force was renamed the 'Coalition', to emphasize that it was not organization driven, but community driven and to make it clear that it was open to all. Similarly, the Executive Committee was renamed the Steering Committee, to show that it was providing guidance and leadership, but was not a Board of Directors. Charters were set for each group, so that the roles were clear.
- The Steering Committee confirmed the role of the coalition to provide the content of the Plan, and established the role of the consulting team as facilitating and managing the process.
- The six criteria for the Plan, put forth by the Northwest Area Foundation, were adopted as the Guiding Principles of the Coalition's work.
- Ground rules for all Community Ventures meetings were set, which were to assure that all voices were heard, that all were treated with respect, and that there were no surprises for the people involved.

- A Coalition consensus building, decision-making process was agreed to that would be used for all major decisions affecting the content and direction of the Plan.
- The work-plan and schedule for developing the strategic and community driven poverty reduction plan was set. This work plan was built on a strategic planning approach, but grounded in the belief that the community held the answers to its future. It included gathering information, evaluating the opportunities and challenges, setting a vision for the future, setting strategies and actions, and developing an implementation plan.

(The role descriptions, decision-making guidelines, and other documentation of the process structure can be found in Appendix A.)

The overall planning process can be described as having three dimensions:

- Leadership that provides consistent guidance, manages resources, and encourages communication.
- Full Coalition participation in deciding the content of the Plan, and the use of Committees and Teams to do the in-depth work of developing strategies and the framework for implementation.
- Community involvement in shaping understandings and giving feedback about the plan.

A graphic picture of all three dimensions from July of 2002 to September of 2003 is represented on the following page. It highlights what occurred during the planning process with leadership, the Coalition, and the community, and describes the accomplishments at each of the Coalition meetings and the work of the teams and committees formed during the process to develop specific parts of the Plan. Each subsequent chapter of the report provides expanded descriptions of each meeting, the groups that were formed, the planning techniques and the community input processes that occurred over the course of the project.

September Coalition Kickoff

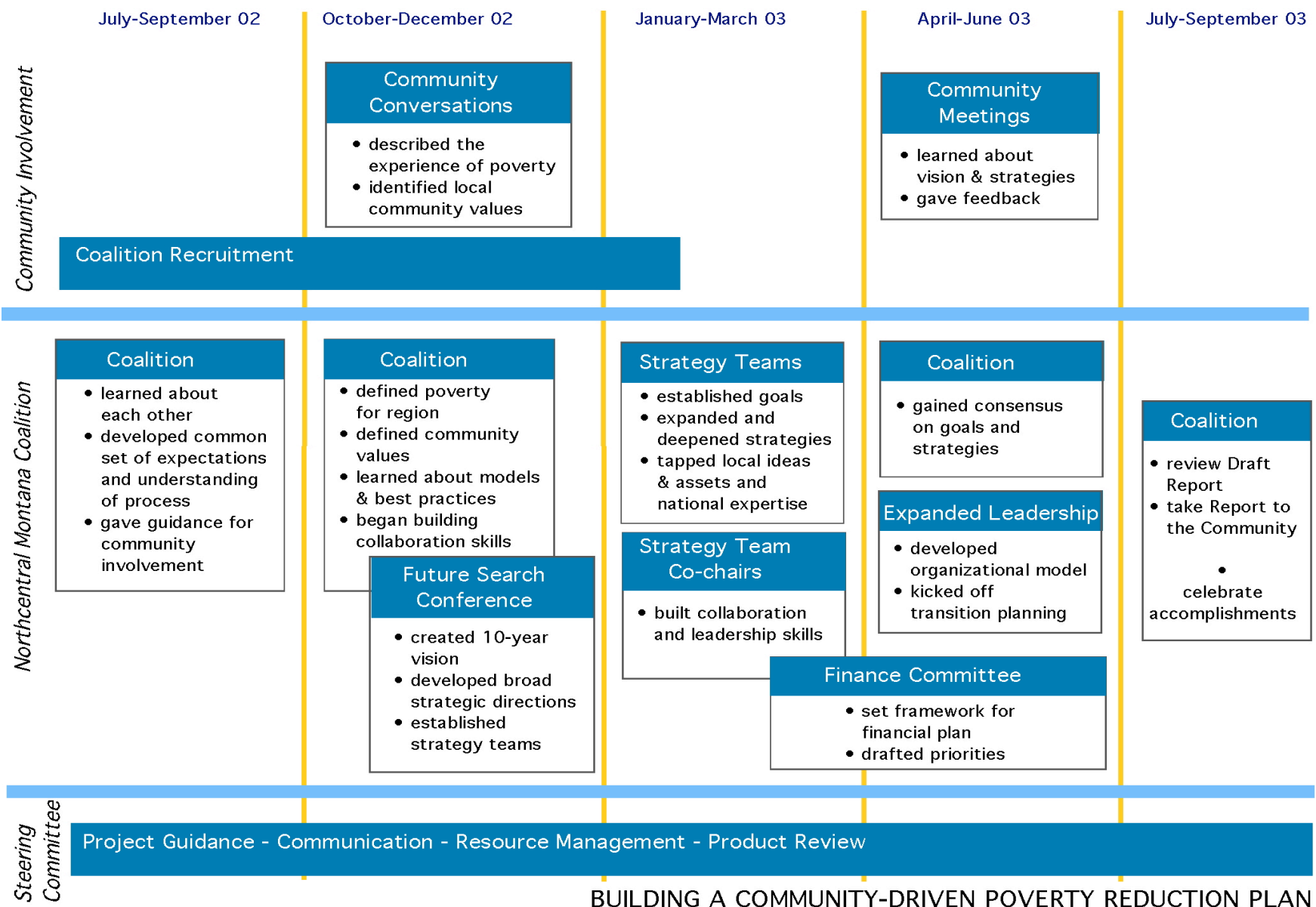
57 people attended the Kick-off meeting at the Holiday Inn – Great Falls, which provided the formal launch to the planning process. The organizational framework and work plan developed by the Steering Committee was presented and adopted.

To familiarize participants with the region as a whole, a brief presentation about the demographics and economics of the different communities was given. Participants were also given an opportunity to introduce themselves and share their passions and concerns with each other, in small groups, and with the full group. Concerns about trust, racism, and money grabbing, as well as hopes for healthy families, jobs, and an ability to work together, were aired.

The consulting team sought input from members about the community conversations in their communities and Coalition members signed up to listen in on conversations in areas they did not know well.

NWAF Criteria

Development of local abilities to achieve long-term community goals



BUILDING A COMMUNITY-DRIVEN POVERTY REDUCTION PLAN

Leadership

"The Coalition needs to have a strong core with flexible edges."

Member of a Strategy Team

Leadership is a key ingredient for the success of any project. As leaders of the Northcentral Montana Community Ventures Project, we wear many hats. We constantly juggle and balance multiple roles. In the context of enormous competing demands, the Steering Committee, and more recently the Co-Chairs of the Strategy Teams, have provided the core leadership for the planning process over the last two years. Traveling long distances to attend meetings, recruiting new participants into the project, researching potential strategies, and handling a variety of public relations activities are components of the job description for leaders of the planning process. The Co-Chairs, assisted by a member of the consulting team, were asked to play the following roles (a full description of the activities for each role can be found in Appendix A):

- *Leader*
- *Organizer/Coordinator*
- *Communicator and Information Disseminator*
- *Facilitator*

Coalition Leadership

The Steering Committee has been the rudder for the project. The Committee met monthly over the last year to work with the consulting team to guide and manage the project. Meetings were held in person, by videoconference, or by teleconference to assure participation, as well as, consistent and timely decisions. Typical meetings ran anywhere from 3-6 hours with topics from monthly finances to learning and adapting to the evolution of the project. Their Charter states:

The Steering Committee provides leadership and direction for the NWA Community Ventures Planning Project on behalf of the Northcentral Montana Coalition and in collaboration with the project consulting team.

In January of 2003, Co-Chairs were named for each of the seven strategies. The goal for each team was to achieve visible leadership, both Indian and non-Indian, offering opportunities for low-income members to assume leadership positions. The only variation of this pattern was the Health Care Strategy Team chaired by two Indian leaders and the Education Strategy Team chaired by two non-Indian leaders.

Assuring Participation and Involvement

Participation by people from all parts of the region and all walks of life was seen as critical by the Steering Committee to having a plan, which in the end, would be implemented. Therefore, the leadership team focused strongly on increasing participation and providing many different ways for involvement throughout the planning process. The goals set included:

- Active participation from a variety of stakeholder groups
- Consistent representation from each reservation and county
- Involvement and support for low-income persons

During late July and August, Steering Committee members worked with the Consulting Team to evaluate participation to date and identify gaps in stakeholder involvement. The Steering Committee members named individuals and organizations that might 'round out' the spectrum of voices in the Coalition coming from:

- Education
- Community (Civic organizations or community at large)
- Human Services
- Church and Faith Groups
- Government
- Business
- Housing
- Agriculture
- Economic Development
- Low-income

NWAF Criteria
*Substantial involvement
of diverse interests*

A total of 199 individuals received a formal invitation to join the Coalition in August of 2002 and 75 agreed to join the effort. Since then, the Coalition has grown to 117 active members². Representatives came from each county and each reservation.

In January 2003, after the Coalition had set its strategic directions, another recruitment effort was undertaken as Strategy Teams were developed. Some Coalition members who had been a part of putting the overall framework of the plan together lessened their participation, but about 40 new members of the community joined the effort and committed to lending their knowledge and experience to an intense three-month effort to develop strategies and actions to reduce poverty.

² An 'active Coalition member' means that the individual has attended at least two Coalition meetings, served on a strategy team, participated on Catalyst, responded to one or more survey, and/or is a member of the Steering Committee.

Communications and Public Relations

The Steering Committee also identified communication with the larger public and public relations as critical to developing the capacity of the region to support a ten-year poverty reduction plan. The public relations effort involved a variety of strategies over time, described below.

Communication and Public Relations Tool or Technique

<i>Website</i>	The 'Opportunity Montana' website went live in September. The site provided an additional vehicle for communication about the project and with the community.
<i>Press Releases</i>	Press releases were generated monthly beginning in September. Each release announced what was happening with the project, ways to become involved, or presented the results of the most recent phase of the planning effort. These were sent to more than 30 news organizations including newspapers and television and radio stations throughout the 11 county region. The Community Ventures Project received substantial coverage from newspapers and television stations across the region. The coverage provided additional avenues for the public at large to become familiar with the issues of poverty and the work of the Coalition.
<i>Newsletters</i>	The first project newsletter was published in October. It was available online and in print. Newsletters were sent out quarterly to a mailing list of 541 people, which continues to grow as the awareness of the project increases. The newsletter list includes public officials, every individual that participated in the community conversations, interested community members, and all participants in either Coalition or Strategy Team meetings.
<i>Editorial Boards</i>	Steering Committee members met with the editorial boards of the Havre Daily News and the Great Falls Tribune to make sure that the major print media sources were well informed about the project.
<i>Resolutions</i>	Coalition and Steering Committee members actively sought resolutions from the legislature, each county commission, and each tribal council. To date, resolutions have been received from the Montana Legislature, Blackfeet Nation, Chippewa Cree Tribe of the Rocky Boy's Reservation, Fort Belknap Indian Community, Little Shell Tribe of Chippewa Indians of Montana, the Commissioners from Blaine, Cascade, Chouteau, Glacier, Hill, Judith Basin, Liberty, Phillips, Pondera, Teton, and Toole Counties and the cities of Chester, Fort Benton, Havre, and Malta. (Copies of the resolutions can be found in Appendix H.)

Letters of support

Participating organizations, as well as future partners, were invited to provide the project with letters of support. To date, support letters have been received from the State of Montana Department of Public Health and Human Services, Montana Office of Public Instruction, North American Rural Futures Institute – Montana State University, University of Great Falls, and United States Department of the Interior. (Letters of support can be found in Appendix H.)

Speakers Bureau

Steering Committee members were provided with a presentation packet and were invited to give presentations to community groups throughout the project planning period.

Community Feedback

During the first two weeks of May 2003, 11 community feedback meetings were held across North Central Montana. The purpose of the meetings was to inform local citizens about the work of the Community Ventures Project and invite their feedback about the strategies and actions developed by the seven strategy teams during February through April. The meetings were held in:

- Browning
- Conrad
- Fort Belknap
- Fort Benton
- Great Falls
- Harlem
- Havre
- Malta
- Rocky Boy
- Shelby
- Stanford

The Coalition received important feedback about the elements of the poverty reduction plan. Comments from participants at the community feedback sessions about the strategies and actions were generally approving. While participation was not as great as had been hoped, we heard support for addressing poverty in multiple ways, in particular the willingness to deal with racism, the development of both the youth and adult leadership in communities, expanding job opportunities, rehabilitating and expanding housing, improving transportation, and providing support to families.

We also heard about the need to develop a sense of urgency in the region about the implementation of the plan and the need to involve low-income persons in the implementation. We will need to bring back to communities across the region

NWAF Criteria
Do no harm.

how the plan will be implemented and how it will affect their lives.

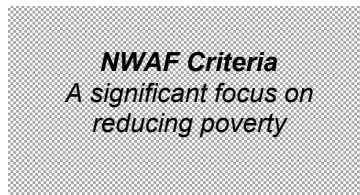
Outside of the immediate work of the Coalition, community members had many ways of being involved or informed. More than 200 people agreed to be interviewed as part of Community Conversations, roughly 100 gave feedback to the strategies and actions, and more than 500 receive a periodic newsletter describing the progress of the Plan. Overall, the Community Ventures planning process has touched the lives of almost 600 individuals in Northcentral Montana. Greater detail about the participation of the community can be found in Appendix A, drawn from the database of interested parties and Coalition members.

NWAF Criteria
Substantial involvement of diverse interests

Challenges

There were two enormous challenges that the Coalition faced in actually carrying out its work. The first is the geographic expanse of the region. No matter where meetings were held, they required hours of travel time, often on poor roads and in poor weather conditions for many participants. This made consistent participation throughout the year very difficult. The Coalition met this challenge by moving meetings to different parts of the region, by holding fewer but longer meetings, and by using technology to bridge the distance. The use of technology, including Internet and telephone, had its own set of challenges, as the quality of service varies across the region and not all Coalition members had computer or Internet access. The consulting team took care that no one was left out of the process because of these limitations.

The second large challenge was to involve persons living in poverty in the actual development of the Plan. This was an ongoing concern to the Coalition and the Steering Committee throughout the process. To help people participate, members could apply for reimbursement of travel expenses, childcare, and lost wages. The goal was to assure that financial barriers to participation did not exist.



Technology Tools for Bridging the Distance

- *A web-based interactive software, Catalyst, was used as a place to hold dialogue, schedule and track meetings, and share information, resources, and documents. Catalyst now houses a library and archive of the work of the Coalition. The Coalition was given hands-on training in the use of Catalyst in a specially set up computer lab at the October Coalition meeting. There was a considerable learning curve for many, but it became invaluable during strategy development. Catalyst can continue to provide the large and growing group a means to communicate across the region.*
- *In March and June 2003, on-line survey instruments were used to determine the level of support for the strategies developed by the strategy teams and the mission, guiding principles, organizational model, and financial plan principles. The tool was chosen in an effort to gain consensus on the major components of the poverty reduction plan, when full Coalition meetings were not feasible. This turned out to be a very successful method of obtaining thorough and thoughtful feedback and decisions.*
- *The Steering Committee, some Strategy Teams, and the Finance Committee used teleconference and video conferences for shorter meetings. Tele-video turned out to be difficult for participants to use and very costly. Teleconferences were more successful.*

Lessons Learned

The community-driven planning process brought with it many lessons. Some lessons were repetitious, ones that we had learned before but were reinforced. Others were new lessons, ones that we hadn't seen so clearly until we participated in the planning process. Some of the lessons that we will take forward are:

- Poverty reduction is multi-dimensional*** Through the community conversations, future search conference and strategy team process, people see poverty reduction as multi-dimensional. The dimensions of culture and racism, multi-generational family poverty, transportation, housing, education, health care, and the economy form the basis for poverty. Addressing one dimension without attending to the others will not reduce poverty.
- Participation*** The individuals involved in the Community Ventures Projects wear many hats and shoulder many demands, and people hold an expectation that periodic participation is enough. Some meetings were two to three days long and a somewhat different group of people attended each day, particularly early in the planning process. Consistency of participation became an issue. Second, citizens are not likely to attend community meetings that are open to the public. The low participation in the community feedback process seems to represent the type of turnout that is likely in Northcentral Montana.
- Survival*** People are used to dealing with issues of survival. Learning to see beyond survival is a challenge and believing that one can do something about it requires a new 'pair of glasses'.
- Independence*** People live in Northcentral Montana to be a part of the big sky and wide-open spaces. People are used to being self-sufficient. You aren't supposed to ask for help until you really are down and out. Collaboration is not well understood.
- Trust*** Building trust and understanding between cultures and communities takes time, patience, understanding and follow-through. Although the Coalition is off to a good start, careful planning of the implementation process must include constant attention to issues of trust and respect.
- Volunteerism*** People expect to come to the aid of their neighbor if there is a crisis, but are less likely to give the gift of their time to ongoing community volunteer work. Volunteers are golden.
- Difficulty with Technology*** Technology presented difficulties for some people, from not having access to a computer and the Internet, to having unreliable modem hook-ups, to simply not being familiar with web-based communication.

NWAF Criteria
*Learning and adapting in
response to new
knowledge and changing
circumstances*

Lessons learned are seeds to be planted. Members of the Coalition, Steering Committee and Transition Team are planting the seeds of these lessons to improve the implementation process and continue to expand involvement across the region.

Products and Outcomes

The Northcentral Montana Community Ventures Project has produced both tangible or 'hard' products and more intangible or 'soft' outcomes. Some products are truly finished and others are emerging and evolving.

The products or outcomes of the planning process are many. They include:

Tangible Outcomes

Network of committed individuals who have been touched by the planning process and represent the 'glue' of implementation

Information that promotes increased understanding about the root causes and the symptoms of poverty

Profiles of communities across the region

Definition of poverty

Strategic directions, strategies and actions

Financial plan

Transition plan with organizational model, mission, and guiding principles

Intangible Outcomes

The ability of a diverse group of people to come to consensus and share a common vision

The safety the group achieved in being able to bring up difficult topics and receive the respect of others

An increased understanding of what it means to be Indian

A desire to create bridges between cultures where there was no bridge before

The dedication to make the plan happen over the next ten years

Even as this report was being written, individuals who have been involved with the development of this plan were talking to their colleagues, neighbors, and friends, and educating them about a particular strategy that they are eager to support; or describing a conversation that they had with someone from another community where they learned something new that altered how they behave or the choices that they make. One of the primary outcomes of the planning process is to have planted seeds to assure that a diverse array of individuals, organizations, tribal entities, local governments, and others focus energy and collective effort on the reduction of poverty over the next ten years.