

how to guide



HOW TO DO A LOCAL

ECONOMIC BLUEPRINT



Introduction



Welcome to the REconomy Local Economic Evaluation/Blueprint Guide. If you are reading this right now, you may already have a good idea about the purpose of this guide and how it might help you achieve your objectives. But before moving on, let's review what this guide is for and whether or not it is right for you.

This guide is based on our experience with a process undertaken by several Transition initiatives under names like Local Economic Blueprint, Local Economic Evaluation or Economic Resilience Study – for simplicity, we'll refer to this as the Economic Blueprint. This process aims to make the case for community-led economic relocalisation by: developing an evidence base about the local economy and key resilience sectors, such as food production; identifying opportunities for more local provisioning; and estimating what they might be worth in terms of revenue, livelihoods (jobs), and

well being. Just as important, this process also aims to include key people in the local community from the very beginning, including members of local government institutions, non-profit organisations, schools, large employers, and community groups.

These two things – making the case for relocalisation and including key members of the community – form the core of the Economic Blueprint process. Where this has been followed, the results have been positive in many ways. In Totnes, for example, the district council chief executive was part of the process, and based on the findings and recommendations of the Totnes Local Economic Blueprint, granted a district-owned office space rent free for use as a [community enterprise incubator](#). This guide identifies the steps that we think will help you replicate similar positive results in your community, and it provides helpful resources to help you build capacities where needed.

It should be noted that there are other methods for evaluating or mapping your local economy, as well as engaging and including members of the community. What method is best for you will depend on your unique situation and your objectives. So far, this process has been successfully undertaken by Transition initiatives that are well established, with team members that have some experience working with economic data, and that have sufficient resources to sustain the work. And the process has supported their wider aims by providing credibility and evidence, creating opportunities to develop relationships with other constituencies in the community, and informing their planning. In this guide, we'll try to point to other methods and anticipate a wider range of objectives that might be served at each step.

The purpose of this guide is to provide support for your community group as you pursue the Economic Blueprint process in your own community. It is designed to inform, guide and support you and your group through a self-facilitated process. In other words, it's up to you to make it work. But don't worry, we've broken the process down into manageable steps that will make it easy, (and maybe even fun,) as you and your team begin to lead the positive transformation of your local economy.

How to use this guide

This guide will lead you and your team through activities that will help you to complete the Economic Blueprint (EB) process in your community. It breaks the process into 5 manageable stages, which approximates the experience we have had in Totnes, Herefordshire, and Brixton, the first three communities to undertake the EB. And it's divided into two parts. The first part provides a 'fast track', focusing on the core EB activities for capable groups with funding and resources in place.

The fast track activity headings are outlined in blue. The second part provides a complementary 'enabler track', chock full of activities designed to help your group develop the capabilities required to do this work, including fundraising, communications, and more. The enabler track activity headings are outlined in green. Throughout, there will be links to helpful online resources, examples, and downloads.

As mentioned above, this is largely a self-directed process. As such, we're assuming that you will follow good practice with regard to facilitating sessions on your own. Before each activity, choose a facilitator, note taker and someone to capture group outputs and 'mind maps' on flip chart paper. If you're a stickler for process, it's probably a good idea to appoint time keepers and 'vibe watchers', too. Need a refresher on how to run effective meetings?

- Here's the Transition Network support resource section www.transitionnetwork.org/resources/how-run-effective-meetings
- Seeds of Change also offers lots of helpful guidance www.seedsforchange.org.uk/resources#grp

The Economic Blueprint process, and this guide, is organised into 5 stages:

1. **Stage 1 – Your Economic Blueprint team.** This stage is about you – you, as in the folks who are driving this work in your community. Using this guide, you and your team will work through several core activities to help you assess and develop your readiness to take this work forward. If you need more support, use the activities in the 'enabler' section of the guide, as well. All the activities in this stage, as well as the subsequent stages, are designed for your entire group, a smaller task group, or relevant individuals, as noted.
2. **Stage 2 – Stakeholders and economic analysis: forming a stakeholder group and planning the economic analysis.** This stage launches two aspects of this process: working with stakeholders in the community and beginning the economic research.
3. **Stage 3 - Stakeholders and economic analysis: creating a shared vision and working the research plan.** This stage continues the parallel streams of work that include leading the stakeholder group on developing a shared vision of a new local economy and continuing the research into important economic sectors.
4. **Stage 4 - EB Summary and Plan, turning economic insights and stakeholder inputs into an actionable plan.** Here you will be bringing together the work, so far, into an easily digestible and shareable synthesis.
5. **Stage 5 – Implementing your Economic Blueprint** – This marks the end of the guide, but not the end of this process. This part is up to you.

Guide Overview

Fast Track: Core Activities		
Stages	Sections	Activities
Stage 1: Your Economic Blueprint Team page 8	Economic blueprint team formation	<u>Group Activity #1:</u> Review and discuss the Economic Blueprint Guide and “The Economic Blueprint - Getting Started” video
	The Project Plan	<u>Individual Activity #1:</u> Developing your project plan
Stage 2: Stakeholders and Research Plan page 10	Identifying community and economic leaders	<u>Group Activity #1:</u> Watch and discuss the video “The Economic Blueprint – Stakeholders and Engagement”
		<u>Group Activity #2:</u> Mind mapping the stakeholder terrain
	Planning the Research	<u>Group or Sub Group Activity #1:</u> Watch and discuss video “The Economic Blueprint – The Economic Analyses”
		<u>Group or Sub Group Activity #2:</u> Research planning
Stage 3 – Creating a shared vision and completing the analysis page 13	Planning the Stakeholder Visioning Workshop	<u>Group or Sub Group Activity #1:</u> Visioning workshop planning meeting
	Visioning Session Follow Up	<u>Sub Group or Individual Activity #1:</u> Crafting and approving the vision statement
	Scoping and Formatting Your Economic Analysis	<u>Sub Group or Individual Activity #1:</u> Draft detailed report outlines
	Primary Research	<u>Sub Group or Individual Activity #1:</u> Identify and engage local domain experts
		** Optional ** <u>Group or Sub Group Activity #2:</u> Geographically map existing businesses in each sector
		<u>Group or Sub Group Activity #3:</u> Map existing relocation projects by sector
	Secondary Research and Writing Reports	<i>Action Research</i>

Stages	Sections	Activities
Stage 4 – Economic Blueprint Summary and Plan page 19	Presentation of Findings	<u>Sub Group or Individual Activity #1:</u> Prepare summary storyboard
		<u>Group or Sub Group Activity #2:</u> Plan ‘presentation of findings’ meeting
	Summing It Up	<u>Group Activity #1:</u> Review and discuss the “Summing it up” video
		<u>Group or Sub Group Activity #2:</u> Planning the summary
	Strategic Planning	<u>Group Activity #1:</u> Your strategic plan
	Final Stakeholder Review	<u>Group or Sub Group Activity #1:</u> Plan summary and action plan review meeting
Enabler Track: Capacity-Building Activities		
Stages	Sections	Activities
Stage 1 – Your Economic Blueprint Team page 25	Economic Blueprint Team Assessment and Development	<u>Group Activity #1:</u> Group self-assessment
		<u>Group Activity #2:</u> Working together
	Creating Your Funding Plan	<i>Action Research</i>
		<u>Group or Sub Group Activity #1:</u> Mind mapping potential funding sources
		<u>Sub Group or Individual Activity #2:</u> Producing your fund raising plan
	Deepening the Context of Your Project Plan	<u>Group Activity #1:</u> Mind mapping your allies and supporters
		<u>Group, Sub-group, or Individual Activity #2:</u> Communications groundwork – more mapping!
Stage 2 – Recruiting Your Stakeholders page 29	Recruiting Your Stakeholders	<u>Group Activity #1:</u> Stakeholders and messages
		<u>Group or Sub Group or Individual Activity #2:</u> Stakeholder recruitment plan
		<u>Group or Sub Group or Individual Activity #3:</u> Produce communications tools (if necessary)
Stage 3 – Leading Toward a Shared Vision page 31	Talking About the New Economy	<u>Group or Sub Group Activity #1:</u> The ‘new economy’ – what is it?
	Skilling Up for Facilitation	<i>Action Research</i>

What's in a name?

Throughout this course, we will be using the term “Economic Blueprint” to refer to this work, sometimes abbreviated to EB. We think it is a pretty good way to communicate the nature of the project, but it may not be perfect or what will work best in your own community. In Totnes, we call this project the *Local Economic Blueprint*. In Herefordshire, it is the *Transition Enterprise Economy*, or TEEconomy. In Brixton, it's *Brixton Economic Evaluation*. In Buxton, it's called the *Buxton Economic Resilience Study*. Whatever identity your group chooses give careful consideration to your objectives and your constituencies, how it may relate to your other REconomy activity, economic projects, Transition projects etc.



Sales & shop closures in Lewes – loss or opportunity?

The Economic Blueprint Guide

Fast Track: Core Activities

Stage 1 – Your Economic Blueprint team

The beginning of any adventurous journey includes planning, assessments, and a clear idea of the goal or destination. “Begin with the end in mind” wise people counsel. Do you know where you’re going? Do you have everything you’ll need? This stage will take you through a brief readiness check and help you with project planning. We’ve organised it into two parts: Group Formation and Project Plan. If your group is ready to go with the skills and resources required, including funding, then this stage shouldn’t take very long to complete.

If your group is in the early stages of formation, requires more time to develop the skills and fill roles, and has yet to secure funding then you may also want to undertake the activities in the *Enabler Track* at the end of this guide, as well. These additional activities will obviously lengthen your timetable for completing this course and your own Economic Blueprint.

Economic Blueprint team formation:

Key objectives: gain understanding of the skills and resources required to undertake EB process, including funding, skills, roles, etc. and assess the group’s capacities.

Group Activity #1: Review and discuss the Economic Blueprint Guide and “The Economic Blueprint - Getting Started” video

Preparation: Everyone in the group should read through this guide and be ready to discuss.

Materials: This guide and “The Economic Blueprint - Getting Started” video, either downloaded or streamed from <http://youtu.be/tl9ZXofJW8A>. Computer and projector to display video.

Duration: 30-60 minutes

Objective: To know what you’re getting yourselves into!

What to do: In a group, watch and discuss the video, as well as the contents of this guide. Ask and answer these questions:

- why are we doing this process – aims and objectives? Who is our audience?
- how can we best make use of this guide?
- what’s required to undertake the Economic Blueprint process?
- do we understand the roles required and are we ready to fill them, such as project manager, group meeting facilitator, communications, researcher, data analyst, writer, graphic designer?
- do we have the skills within our group or can we acquire them, such as project management, facilitation, research, data analysis, industry specific experience, spreadsheets?
- do we have the funding and resources needed to complete this project?

It may be that one or more people in your group will possess many or all of the skills required and can fulfil multiple roles - that’s great. Take care to ensure that individuals

aren't overloaded with too many responsibilities, or that the group and this process become overly dependent upon one or two people.

If you are uncertain about the readiness of your group or still require funding, the activities in the *Enabler Track*, located at the end of this guide, may provide the support you need.

The Project Plan:

Key objectives: draft a project plan.

Individual Activity #1: Developing your project plan

Preparation: Think about what needs to happen during the course of the project, who is going to do what, when, what resources will be required, etc. Draw on outcomes of previous activities.

Research costs and resources where necessary. Review the documents '*Sample workplan & budget*', '*Read me! Important Notes on scope, the sample workplan and budget*', and '*Economic Evaluation - sample project summary*' located in the shared Box folder:

<https://app.box.com/s/eb3uw8azmszqdivu0del1ut6t15chnrz>

Materials: N/A

Duration: 2-3 hours

Objective: To provide the roadmap for the project.

What to do: The project leader should take the lead on creating the project plan, getting input from the rest of the team. As in the sample linked above, the end product will be a document that assembles the key bits of information to enable you to effectively manage and move your project forward. However you choose to organise your plan, it should consider the following:

- aims and objectives
- team roles and responsibilities
- resources required
- EB team recruitment plan, if required
- stakeholder formation
- shared vision process
- economic research and analysis
- summary and action plan
- communications plan
- implementation
- timetable/schedule
- budget

If you have already completed your funding bid, you've probably already covered this material and considered the scope of the research. Here's your chance to revise and fine tune assumptions.

Stage 2 – Stakeholders and research plan

This phase marks acceleration and deepening of the process as you will launch two streams of work. One involves putting together your group of stakeholders, or ‘stakeholder forum’, which will help provide support for this work as it progresses. The nature and character of this group will differ for every community but ideally, this group will be collaborator and co-creator, as well as an important target audience.

The second stream of work involves developing the economic analysis where you will make the case for economic relocation as a regeneration/development strategy for your community. In doing the research, you will provide the evidence base for action. And in the course of this work, you will also identify tangible projects your Transition initiative, REconomy group, allies, and/or coalition partners can take forward to begin transforming your local economy.

Don’t be daunted! Stage 2 is just about the beginning of these two streams and breaks it down into manageable steps. The first two parts include Identifying Your Community and Economic Leaders, and Recruiting Your Stakeholders. The third part is Planning the Research Reports. Stage 2 typically takes two to four weeks.

Identifying community and economic leaders:

Key objective: identify and prepare to recruit your stakeholders

Group Activity #1: Watch and discuss the video “The Economic Blueprint – Stakeholders and Engagement”

Preparation: Download or stream the video from <http://youtu.be/dNIudIV8fbE>

Materials: Computer and projector, if necessary.

Duration: 15 – 30 minutes

Objectives: To gain from the experiences of other ‘blueprinters’ and to collectively understand the benefits and tricky bits of putting together a stakeholder forum.

What to do: Watch the video, ideally as a group, then discuss. Ask yourselves these questions: What are the goals and objectives of your stakeholder forum? How will you establish legitimacy and credibility? What resources and commitments are you looking for from your stakeholder forum members? How often will they meet? How will you recruit them? See the ‘enablers section’ for more help with this.

Group Activity #2: Mind mapping the stakeholder terrain

Preparation: Think about your potential stakeholder organisations and key individuals. (Review previous mapping activities from ‘Enabler Track’, if you did them.)

Materials: Flip chart and pens.

Duration: 60 minutes

Objective: To tap the ‘collective genius’ of your team and their network of contacts.

What to do: This activity has two parts, mapping and discussion. First, spend 30 minutes brainstorming and mapping the economic stakeholders in your community. Ask these questions and mind map the answers: who makes your economic policy? Who is involved in economic regeneration or sustainable development projects? What groups represent the interests of

independent and/or High Street traders? Who are the major employers? Who are the secondary and further education institutions? Who are the potential allies in this work?

* Want to take it a step further? After listing and mapping these organisations, relate them to one another. Create a system diagram that describes how these groups interact and influence one another.

Next, can you identify key individuals in these organisations? Whom do you know and have relationships with? Who *should* you have relationships with? Prioritise the individuals you've identified whom you would like to involve in this work. Profile each, in other words, identify to what extent you know their values and worldviews. Do they support the assumptions of the 'industrial growth paradigm'? Are they proponents of 'new economic' thinking?

Now, for the remaining time, discuss the implications of the picture you have created. Who are the potential members of your stakeholder forum? Most likely? Most desired? How can they support the work with resources, data, expertise, influence, etc.? How will these prospective members contribute to the goals and objectives of the stakeholder forum and the long-term aims of the project, generally? How many should there be?

Planning the research:

Key objectives: prepare for undertaking research and analysis, identify possible means for answering the research questions.

Group or Sub Group Activity #1: Watch and discuss video "The Economic Blueprint – The Economic Analyses"

Preparation: Download or stream the video from <http://youtu.be/TGJ9frrR1N0>

Materials: Computer – internet connection and projector if necessary

Duration: 20-30 minutes

Objective: To create alignment and agreement in the group about the economic research and analysis approach, and assess learnings from other groups.

What to do: Watch the video as a group, either your full group, or just the people involved in the research and analysis. Discuss the video and how the points raised relate to your local situation. Why are you doing the research and analysis? Who among your EB team will be involved? Are you prepared for the challenging and sometimes tedious work ahead? Do you have the resources in place to sustain this work?

Group or Sub Group Activity #2: Research planning

Preparation: Review research report outlines, reports, lists of data sources and other materials produced by other economic blueprint projects. Available in the Box folder:

<https://app.box.com/s/ivcn1bbyzol5j9m1g66j9lm98bnzy0gv>

Materials: Flip chart and pens.

Duration: 1-2 hours

Objective: To understand what's required to successfully complete the research and analysis, agree approach then create a research plan to manage this part of the project.

What to do: Consider at least two main points of discussion: a) which economic sectors to study, and b) the elements of your plan.

a) Research and analysis from Totnes, Herefordshire and Brixton has looked at food, residential energy retrofitting and renewable energy production. Ask these questions and note key bits of information on the flip chart paper: Are these sectors relevant to your local economy? Are they strategically important for creating long-term resilience, transitioning to a low-carbon energy regime, supporting sustainable economic development and employment? What are the benefits and pitfalls of looking at these same sectors? Are there other sectors more relevant to your community and local economy? Given your resources, how many sectors should you look at?

If you have funding, or are in the process of developing your funding bids, you will probably already have considered these questions and made some assumptions about which sector or sectors you will study. Having this discussion at this time will contribute to understanding and goal alignment within your team, if only to serve as a reminder.

It is suggested that you follow the lead of work already completed elsewhere and limit the scope of your research and analyses to the food, retrofitting, and renewable energy sectors – especially if you have limited resources. This will allow you to leverage prior work and we hope, significantly reduce your costs and time to completion.

b) Discuss and agree key elements of your research plan. Ask these questions and note key bits of information on the flip chart paper: Can this work be divided into multiple sub-projects with multiple contributors? Can it be ‘crowd-sourced’? Will we undertake primary research as well as secondary research? Who is going to do what? Do we have the resources necessary? Will we use paid sub-contractors/consultants, if so, who? What if there’s a problem – a contributor drops out, a computer crashes, potential funding doesn’t materialise – what are our contingencies?

Key elements of the plan should include:

- * roles/responsibilities
- * consultants and other third parties, if used
- * funding
- * timetable/schedule

Additional

Resources: The *Local Multiplier Effect* will likely be a key concept you’ll want to highlight. Follow these links to learn more:

http://en.wikipedia.org/wiki/Local_multiplier_effect;
<http://www.amiba.net/resources/multiplier-effect>; <http://www.localmultiplier.com/>;
<http://www.pluggingtheleaks.org/>

Economic ‘relocalisation’ is another important concept. Here are few resources that may be useful to you:

<http://localisewestmidlands.org.uk/> & <http://www.oecd.org/cfe/leed/44681969.pdf>



How much food is grown locally and sold/bought locally?

Stage 3 – Creating a shared vision and completing the analysis

In this phase of the economic blueprint process we will be making some significant progress. Your group has already assembled a 'stakeholder forum' which is ready to support this work. Now, you are going to lead them on an exercise to develop a 'shared vision' for your local economy. You've also already developed a plan for undertaking the economic analyses and may have already begun the research. Now, you are going to complete the research, synthesise the data, and write the reports, highlighting opportunities for 'relocalisation' in terms of wealth creation and retention, employment, social and environmental benefits.

This stage can be challenging, but your good preparation so far will help! For creating the shared vision, the steps are Planning Your Visioning Workshop and Visioning Session Follow Up. If your team needs more support, be sure to check out the activities for Stage 3 in the 'enabler' section. For the economic analysis, the steps are Formatting and Scoping the Economic Reports, Primary Research, Secondary Research and Writing the Reports. This work should take about 6-8 weeks, depending on people, resource and data availability.

Planning the stakeholder visioning workshop:

Key objectives: lead the stakeholders toward an agreed vision statement for the local economy

Group or Sub Group Activity #1: Visioning workshop planning meeting

Preparation: Review this page on the REconomy.org site:

<http://www.reconomy.org/leadership-projects/create-a-shared-vision-and-strategy/> and the documents in the shared Box folder:

'*plan-for-Totnes-REconomy-workshop-24th-May-2011-v2*' and

'*2.2.-TEMPLATE-FOR-RUNNING-A-NEW-LOCAL-ECONOMY-VISIONING- WORKSHOP-final*' -

<https://app.box.com/s/ly76dp4jiz94uj0impz3nzd03it2fw8w>

The former is the agenda used to generate the shared vision in Totnes and the latter is a template for an alternative approach. In the Box folder, you may also find it helpful to review '*Agenda for Totnes Economic Vision Meeting*', where the Totnes vision statement was presented and continuing role of the stakeholder group was discussed.

Materials: Flip chart paper and pens

Duration: 1-2 hours

Objective: To plan details of your visioning workshop

What to do: This will likely be the first time you assemble this important group, and you want it to go well. To run a successful visioning event, many details must be planned, preparations made, and resources assembled. As always, starting with the end in mind and creating a plan will help you succeed – and reduce stress!

Make sure key participants have prepared for this planning session. This activity is in two parts. The first part is about discussing important factors that will contribute to the success of your visioning session. The second part is planning the details.

First, discuss these questions, capturing important points on the flip chart paper:

- What is the goal of the visioning session, and objectives for the event? What are the expected or hoped-for outcomes?
- Shall we agree a 'terms of reference' sheet or a charter for stakeholder forum? Should this be something we discuss as part of this event?
- How can we introduce useful background on key local economic and "transition" issues in balanced, useful, and effective ways for this group?
- How can we ensure balance, diversity, and inclusion during the meeting?
- How will we talk about sectors of the local economy that are important for long-term sustainability and resilience? Well being?
- How will we talk about sectors that are most vulnerable in terms of long-term sustainability and resilience, including wellbeing?
- Are there any other important issues to anticipate?

Second, discuss the detail of the session and outline into a plan format.

- What are the roles and responsibilities of team members? Who will facilitate? If an outside facilitator, who will brief her or him? Are they/should they be part of this meeting?

- Where and when will the meeting take place? When must invitations go out? Who will manage that?
- What will be the agenda for the day? Review and modify, if necessary, the sample agenda and/or template linked above.
- Will there be a need for presentation or briefing materials? Who will produce those?

Visioning session follow up:

Key objectives: craft vision document for stakeholder forum approval

Sub Group or Individual Activity #1: Crafting and approving the vision statement

- Preparation: Review notes and flip charts from visioning session, review similar documents from Totnes and Brixton: *'Totnes Local Economy Vision - v3'* and *'Rethinking our local economy'*, both located in the shared Box folder, linked above.
- Materials: flip chart and pens.
- Duration: 1-2 hours (possibly several hours of prep time)
- Objective: To craft vision document for approval, and capture any other issues requiring follow up.
- What to do: This activity is mostly self-explanatory and unstructured. You will already have conducted your stakeholder visioning workshop – if necessary, meet with members of your team who were present during visioning session and prepare the draft of your 'visioning statement', a document that captures what was said and agreed in during your workshop. Review flip charts, notes, and other materials generated during your session. Be sure to capture any other issues to follow up, especially those to be reported back to your stakeholder forum. Circulate proposed final document for approval from the stakeholder forum.

Scoping and formatting your economic analyses:

Key objectives: create appropriate research questions and report outlines

Sub Group or Individual Activity #1: Draft detailed report outlines

- Preparation: Review outlines and reports and other materials from Totnes, Herefordshire and Brixton, think about local needs. Download here: <http://www.reconomy.org/leadership-projects/evaluate-the-economic-potential-of-your-new-economy/> and/or here: <https://app.box.com/s/ivcn1bbyzol5j9m1g66j9lm98bnzy0gv>
- Materials: N/A
- Duration: 2-4 hours, including prep time
- Objective: Create appropriately local and well-scoped research questions and report outlines (i.e. the report structures / sections to be completed).
- What to do: This activity is about making sure that those who are going to do the research, perform the analyses, and write the reports have a clear understanding about their focus and scope. Most likely, you have chosen to examine the same economic sectors in your community that have been studied elsewhere. We strongly recommend adapting the

research questions and report formats used in those other reports. If you are looking at different economic sectors, reviewing these reports will offer models from which to create your own outline.

For this activity, the appropriate members of your team should discuss these questions: what can be borrowed from economic blueprint reports done elsewhere? Outlines, research questions, data sources, graphics, other content? Are the research questions and outlines appropriately defined? Are they congruent with your goals and objectives? How can spreadsheets be organised such that there is a clean audit trail of data used, assumptions, calculations, etc.?

Next, draft your research questions and report outlines appropriate to the economic sectors you are studying and your local conditions. Again, we strongly recommend adopting research questions and outlines used in other locations, and adapting them.

Primary research:

Key objectives: to acquire unique local data and qualitative information, engage others in the economic blueprint process

Sub Group or Individual Activity #1: Identify and engage local experts

- Preparation: Think about local organisations and individuals who might contribute expertise to your economic analyses, and review notes from earlier mapping activities, if necessary
- Materials: N/A
- Duration: 30-60 minutes
- Objective: build relationships with local 'domain' experts e.g. food, renewables etc., and have them contribute and/or review and evaluate your economic analyses
- What to do: Conduct this like a mapping exercise, if you wish. Given the sectors you wish to study, who are local experts you can approach to review and comment on your work? Can local schools and/or universities provide expertise and/or resources? Spend a few minutes mapping on flip chart paper individuals and organisations you might approach.

Develop a plan for engaging these individuals and organisations. Whether you choose to work informally with local expert or choose to assemble focus groups for each sector is up to you and your budget. Probably 2-3 experts in each sector would be sufficient. Keep in mind, these relationships may be important for the long-term success of your economic blueprint work.

**** Optional ** Group or Sub Group Activity #2: Geographically map existing businesses in each sector**

- Preparation: Review online mapping resources, such as:
<http://www.mappingforchange.org.uk/services/community-maps/>
<http://foodtrade.com/>
- Materials: N/A
- Duration: undetermined
- Objective: create map(s) of local existing businesses in the sectors you are studying, and provide an activity to engage additional Transition activists

What to do: Mapping is an activity that can not only yield interesting insights about your geographic area, but can be a fun activity that brings more people into the process. We recommend developing a research plan and following a model such as this:

- recruit researchers from your Transition theme groups and from local schools
- have researchers identify and characterise businesses operating in relevant economic sectors. You may develop characterisation criteria as necessary according to your needs.
- researchers can go into the field, such as visiting the High Street or local industrial estate(s), and they can utilise the internet to identify local businesses.
- have researchers enter businesses into a Google map or other online mapping tool
- you may also wish to develop a survey for a subset of businesses to gain qualitative information on challenges, outlook, etc.
- results can be used in communications, such as a press release
- make sure to throw a party after the work is complete

Evaluate the work. Does the mapping provide interesting conclusions? Are there clusters of similar businesses? Are there opportunities for co-location or industrial symbiosis?

Group or Sub Group Activity #3: Map existing relocation projects by sector

Preparation: Review other community-based projects highlighted in Local Economic Blueprint reports from Totnes and other locations

Materials: Flip chart and pens

Duration: 1-2 hours

Objective: Identify projects already underway, planned, and that could/should be initiated that relate to the economic sectors you are studying.

What to do: Run this as a mapping exercise as you have done in previous activities. Choose a facilitator and scribe. Invite others outside your economic blueprint group if appropriate. Ask these and related questions and map answers on the flip chart:

- What projects are already existing or planned that pertain to each sector? Include those managed by your TI as well as those run by other organisations, including those by the local authority.
- What new projects could we initiate? What will create the conditions for change?
- What might we want these projects to accomplish?
- What could other organisations initiate?
- What are the opportunities for partnership and collaboration?
- What projects should be initiated but require stronger foundations or more resources?
- What are some intermediate projects to get us there?
- Are any of the organisations listed included in your previous mapping exercises?

Review your map and feed results into your economic sector reports as appropriate.

Secondary research and writing the reports:

Key objectives: review published qualitative and quantitative information, complete your economic sector reports

Action

Research:

This activity is for the member(s) of the group engaged in researching and writing the detailed economic sector reports. We estimate 50-80 hours of work per sector if you are working to the level of detail as illustrated in Totnes, Herefordshire and Brixton reports.

- You will conduct secondary research (i.e. you pick up research that others have already done) to gain the data and information required to support your analyses. Use the footnotes and endnotes from the reports done in Totnes, Brixton and Herefordshire to identify possible data sources for your research.

- Usually you will need to use spreadsheets to develop the data you find into more relevant information, including making calculations, estimates, extrapolations, and organising it into tables, charts and graphs where necessary. You will be best served by clearly organising and commenting your spreadsheets, and identifying key assumptions where applicable.

- You will also synthesise the information gained through the reports you've surveyed, and any primary research and other activities undertaken in during this course. You will have identified opportunities for taking advantage of local multipliers and for relocating provisioning of goods and services. Here you can indicate relevant projects in your community that are already in process – ones you identified, above – that can directly or indirectly create the conditions for change.

- Finally, you need to assemble all this into a clear narrative in each of your detailed economic sector reports, as per the examples provided. A review of the detailed reports completed in Totnes, Herefordshire and Brixton, will be helpful. Find these reports, here:

<http://www.reconomy.org/leadership-projects/evaluate-the-economic-potential-of-your-new-economy/> and/or here:

<https://app.box.com/s/ivcn1bbyzoI5j9m1g66j9lm98bnzy0gv>



Source: Totnes Economic Blueprint

Stage 4 – Economic blueprint summary and plan

Well done, you've reached the final stretch! You've engaged key stakeholders in your community, brought them together into a forum to support this work, and led them to agree a shared vision of what your local economy could be. You've completed your detailed economic sector reports and have developed a body of knowledge that will provide an evidence base for further action. But your work is not quite done.

This stage is about bringing the process you and your stakeholders embarked upon weeks ago to an important milestone. During this phase, you may meet with your stakeholder forum twice, depending on your needs. First, you may want to meet to present the findings from your economic sector work, seeking to maintain their engagement with the process, collect their feedback and begin discussing the commitments you will ask from them.

You will also create a summary document for wider distribution and create an action plan for taking the work forward. The summary and action plan set the stage for work you hope to embark on together with your stakeholders and with a wider coalition of organisations in your community. Once your first draft is ready, you may want to assemble your stakeholders for a second working session in this stage. During this working session you would seek feedback on the summary and action plan. You would also secure commitments of resources, whether time, in-kind, funds, policy or something else to support the projects you've identified.

During this entire process, and especially with what you are delivering in this stage, you are hopefully

earning much deserved credibility for your team and your Transition Initiative. This will create new opportunities to build collaborations, launch projects, and develop sources of funding. This also brings responsibility to act quickly and effectively while you have momentum. So this stage is all about helping you prepare to build the platform for long-term success.

There are four main activities to this stage. The first is the Presentation of Findings, where you will share what you've learned in your economic sector research and analysis. Then, there's Summing It All Up, Strategic Planning, and Final Summary and Review.

Presentation of findings:

Key objectives: to keep stakeholders apprised, engaged, supportive

Sub Group or Individual Activity #1: Prepare summary storyboard

Preparation: Review economic sector reports and think about appropriate means of sharing key points, review Totnes presentations located in the shared Box folder, here:

<https://app.box.com/s/17vceuc7cqyixq2x38qj9zm4jyyhr4fi>

Materials: flip chart and pens, if necessary

Duration: 1-2 hours, (2-4 hours prep time)

Objectives: identify the key points from the economic sector reports to share, including conclusions, recommendations, etc, and identify best medium for sharing, such as Powerpoint, video, posters, etc.

What to do: This activity will take intense focus and ideally would include those involved in producing the original reports, as well as individuals with fresh perspective. Participants will have read through the reports and made notes.

Carefully review the key points to be drawn from the detailed reports and shared with the stakeholders. Keep in mind your audience, appropriate level of detail, important messages to be delivered, agreements to be sought etc.

Using flip chart paper, if necessary, create a storyboard that describes the content and flow from one key point/slide to the next, noting bullet points, data, charts and graphs, illustrations, photos, etc. that convey your key summary points. Be sure to borrow heavily from summaries already done in Totnes and elsewhere.

Additional

Resources: Want some advice on how to develop an effective storyboard? Check out this resource:

http://www.guidedinsights.com/uploads/Storyboard_SLR_tipsheet_0213.pdf

Group or Sub Group Activity #2: Plan 'presentation of findings' meeting

Preparation: Review storyboard you prepared earlier, think about goals and objectives of the meeting,

Materials: flip chart and pens

Duration: 1-2 hours

Objectives: create meeting plan and agenda

What to do: What you are planning here is the meeting of your stakeholder forum where you will present your research findings. Discuss goals and objectives for this stakeholder session, noting key information on the flip chart paper. Ask these and related questions, capturing

key information on your flip chart:

- what much detail should we share?
- how much time should we spend discussing findings?
- should we include a brainstorming session on our proposed solutions and projects?
- should we gain feedback and conduct a prioritisation exercise for our recommendations at this meeting?
- should we circulate economic sector reports before or after this meeting?
- what kinds of commitments might we seek from these stakeholders and how can we foreshadow them?
- should we invite additional representatives from the stakeholder organisations?
- what additional information do we want to share, points we want to make, messages we want to make sure come through clearly?
- shall we use presentation software like Powerpoint and/or develop other materials, such as posters, briefing papers, etc.?

When you are ready, develop your agenda and meeting plan, including, roles/responsibilities of team members, timings, equipment and materials needed, invitations and venue, etc. Also, assign the task of developing your presentations materials to one or people who can produce professional-quality materials. Note: you may need to budget for this.

Summing it up:

Key objectives: create your main communications tool - the summary document

Group Activity #1: Review and discuss the “Summing it up” video

Preparation: Think about how summary will be used, who it's for, etc.

Materials: “The Economic Blueprint – Summary and Action Plan” video, either downloaded or streamed from <http://youtu.be/VScQwYTHDPQ>. Computer and projector to display video.

Duration: 15 - 30 minutes

Objective: To hear and reflect on the experiences of others

What to do: In a group, watch the video. What are the relevant points for your group?

Group or Sub Group Activity #2: Planning the summary

Preparation: Review all relevant work you have produced previously, including early mapping exercises and communications groundwork, as well as results from your presentation of findings. Also review summaries created in Totnes, Brixton, and Herefordshire – here:

<http://www.reconomy.org/leadership-projects/evaluate-the-economic-potential-of-your-new-economy/> and/or here: <https://app.box.com/s/17vceuc7cqyixq2x38qj9zm4jyyhr4fi>

Materials: flip chart and pens, if necessary

Duration: 1-2 hours, (2-4 hours prep time)

Objectives: Develop the ‘creative brief’ for the summary author(s)

What to do: The summary document will become the iconic representation of your economic blueprint process. It will be the main tool you use to communicate with others about what you, your stakeholders, and community have accomplished. Therefore, it will ideally need to be of a high professional standard. Whether you have chosen to have a single author of this document, a main author with contributors, or an edited work with several contributors, this

activity will help get you/them started off on the right foot.

After reviewing relevant materials as described above, discuss the following and related questions:

- what is the purpose of this document?
- how will it be used?
- who is/are the intended audience/audiences?
- what's the overall message and tone? Supporting messages?
- are results of our early mapping exercises still relevant? If not, what has changed?
- how can we or should we integrate feedback from our 'presentation of findings'?
- how can we leverage, repurpose, reuse the work of others?
- shall we follow a similar format and medium?
- which graphs and images shall we use or produce?

Once you are satisfied that you have arrived at a clear creative brief for your author or author team, whether the brief is an outline of notes or a more robust document, hand off the task with a clear understanding of schedule and reviews.

Strategic planning:

Key objectives: create 2-3 year plan taking this work forward

Group Activity #1: Your strategic plan

Preparation: Review all previous work, think about how to make progress for the next few years

Materials: Flip chart paper and pens.

Duration: 2+ hours

Objective: To create a realistic 2-3 year plan

What to do: This activity is about planning your work for the next 2-3 years – i.e. Stage 5 of this process. Invite members of economic blueprint team, as well as close associates within the Transition initiative. Review the work that you've produced so far, including mapping exercises, economic sector reports, and stakeholder feedback. (Note: it may be that this exercise depends upon the progress made on the summary, and vice versa).

Ask these and other relevant questions, and discuss these key topics, capturing important points on the flip chart:

- review projects identified in the economic sector reports, as well as those mapped in earlier exercises
- are there other projects to include? building a wider and deeper coalition? spawning clusters and networks? community engagement? catalysing and incubating 'transition enterprises'?
- how were these prioritised by stakeholders, if you have that information?
- what is the proper planning horizon – 1 year, 2, 3?
- review resources available and those required
- what can stakeholder partners do?
- review stakeholder roles, commitments, contributions
- which new coalition partners might be recruited?

- review earlier mapping exercises listing potential allies and partners
- what is possible without additional funding?
- review and revise funding plan
- how much funding do we need and when?
- what structures are required for long term continuity?
- once agreed, how will we publicise the summary document and this strategic plan?
- shall we host a launch event or press conference?
- review or develop communications plan

When you are satisfied that key points have been adequately captured and there is clarity about your key goals and activities for this plan, condense these into a document(s) that includes roles/responsibilities, schedules, finance, communications, etc.

Final stakeholder review:

Key objectives: to keep stakeholders apprised, secure endorsements and commitments

Group or Sub Group Activity #1: Plan summary and action plan review meeting

Preparation: Review summary, action plan, and think about goals and objectives of the meeting

Materials: flip chart and pens

Duration: 1-2 hours

Objectives: create meeting plan and agenda

What to do: Discuss goals and objectives for this stakeholder session, noting key information on the flip chart paper. Ask these and related questions, capturing key information on your flip chart:

- should we circulate draft summary and plan before the meeting?
- should we ask for specific feedback via email prior to meeting?
- should we conduct a prioritisation exercise for projects, roles, and activities we've identified in plan?
- what commitments should we ask from our stakeholders?
- should we invite additional representatives from the stakeholder organisations?
- what additional information do we want to share, points we want to make, messages we want to make sure come through clearly?
- shall we use presentation software like Powerpoint and/or develop other materials, such as posters, briefing papers, etc.?
- shall we discuss next steps such as a launch event, PR and/or other ways to publicise this work?

When you are ready, develop your agenda and meeting plan, including, roles/responsibilities of team members, timings, equipment and materials needed, invitations and venue, etc. After the meeting, be sure to incorporate feedback as necessary into the final version of your summary document.



Herefordshire final report presentation.

Stage 5 – Implementing your economic blueprint

The process of creating your Economic Blueprint is complete. You will also have outlined a strategy for moving your recommendations forward, based on the economic analyses you undertook and the input from the many stakeholders and allies you have gathered. This stage of the process is currently underway in process in places like Totnes and Brixton – and now in your community - time to celebrate! And good luck with your own stage 5 as you take this work forward!

Enabler Track: Capacity-Building Activities

These are optional activities that you may find useful, depending on the skills and experiences you already have as part of your team.

Stage 1 – Your Economic Blueprint team

If your group requires additional support in its formation, fundraising, and project planning, these activities may provide the help you need. The activities in this stage are organised into three parts: Economic Blueprint team assessment and development, Creating your funding plan, and Deepening the context for your project plan.

Economic Blueprint team assessment and development:

Key objectives: gain understanding of the skills and resources required to undertake EB process, including funding, skills, roles, etc., and assess and develop the group's capacities

Group Activity #1: Group self-assessment

Preparation: Think about the goals and objectives of your Transition Initiative and/or REconomy group and how the Economic Blueprint and the work of your Economic Blueprint team fits. If necessary, download a SWOT template from:

http://www.mindtools.com/pages/article/newTMC_05.htm?download=1

Materials: SWOT template and flip chart paper, pens.

Duration: 60-90 minutes

Objective: To ascertain your group's readiness.

What to do: This activity is in three parts and will help you get a clearer picture of your EB team's readiness to take on this work. Make sure you choose a facilitator and scribe.

First, if you are a big group, organise yourselves into pairs. Spend 3-5 minutes discussing the overall goal of your Transition initiative, REconomy group, or community group with respect to your local economy. What are you trying to accomplish? If your "goal" is really lots of goals, then that's not your *overall* goal. Strive for clarity. If you were in pairs, share your answers with the group. Are you in agreement? Is there clarity? If you can create clarity and agreement with 5-10 minutes more discussion, do so, then move on. If that's not possible, then agree how much more time to give this, and also check for any other issues getting in the way within your group. Do you have a clear process about how to come to agreement/make decisions?

If you agree the overall goal with respect to what you're trying to accomplish in the local economy, repeat the exercise, in different pairs or as group, articulating the aim(s) of doing the Economic Blueprint. What are we trying to accomplish with the EB work? How will this work support the overall goal of our group? If you were in pairs, share your answers with the group. Are you in agreement? Is there clarity? If so, move on. If not, invest 10-15 minutes until you reach agreement and an acceptable level of clarity.

Second, spend 10 minutes looking at yourselves more closely. From our review of this guide and [‘The Economic Blueprint - Getting Started’](#) video, we have developed an understanding of what’s involved in this process, the kinds of skills we’ll need to do the work, and the roles we’ll need to fulfil. Do we have these skills? Are we ready to fill the roles required? Let’s find out. Have one person prepare to write on flip chart paper and survey each member of the group, noting their answers on flip chart – what relevant skills do you have for undertaking the EB process, ie, facilitation, research, data analysis, etc.? Then, do the same thing with respect to roles – what roles are you willing and able to fulfil during the course of this work. Review the list and ask these questions: Is everyone clear? Are there gaps? Is it immediately obvious how to fill the gaps? If not, you may have to develop a plan to recruit additional team members. Could this prevent you from going forward?

Finally, spend 20 minutes looking at your group and its capacity to complete this project with respect to Strengths, Weaknesses, Opportunities, and Threats. Refer to the SWOT analysis template and draw the four quadrants on a piece of flipchart paper. As a group, spend 2 minutes brainstorming in each category, collecting ideas ‘popcorn’ fashion from everyone. Think about your core competencies, support networks, propensity to burn out, external factors, holidays – let loose, be free to put anything up.

After you’ve completed each quadrant, review the contributions in each. For example, in Strengths, you may have contributions such as “many experienced researchers”, “well resourced”, “strong support from our families”. In Weaknesses, you may have “not enough funding”, “only one of us knows spreadsheets”. In Opportunities, you may have “relationship with Council”, “funding pot from Tudor Trust”. In Threats, you may have “we may lose our premises in two months”, “Tesco may be moving in”. Whatever you end up with, ask yourselves these questions: have you captured everything? Are these the most relevant and salient? Do they indicate that contingencies must be planned, capacities increased, and if so, what are we going to do about them? Are there any ‘game changers’ or ‘show stoppers’? Are we feeling confident to proceed?

Additional

Resources: What if after these exercises we discover that we may not be ready to take on the EB, and in fact, may have deeper issues in our group? To gain further insights into the readiness or capacity of your group to undertake challenging projects, you may find this ‘health check’ diagnostic tool helpful, developed by Transition Support & Training.

It’s a self-guided group activity and may help you develop a better understanding of your group. You can find it here <https://transitionnetwork.org/resources/health-check/>.

Group Activity #2: Working together

Preparation: Think about how you want to work together, expectations, meeting processes, etc. Consult information on group development and decision making from the Transition Network Support Offer <https://www.transitionnetwork.org/support/develop-your-group> and also see www.seedsforchange.org.uk/consensus) and non-violent communication www.cnvc.org.

Materials: no materials required

Duration: 30-60 minutes

Objective: To create effective group process.

What to do: This exercise is for you to structure as you wish. Working together on this project will undoubtedly be rewarding but challenging. Developing agreement now on how you will work together as a team will serve you well as you move forward through this process.

Additional

Resources: It may be useful to review Tuckman's classic 'stages of group development' – aka 'forming, storming, norming, and performing'.

http://en.wikipedia.org/wiki/Tuckman%27s_stages_of_group_development

Creating your funding plan:

Key objectives: learn about key learning sources, draft a funding plan.

Action

Research: We estimate you may need £10,000 - £15,000 to support this work. Where can you find that kind of funding? That's a good question and the answer will be different for each community. There are the usual suspects, of course, such as the Lottery, foundations and trusts, etc. At least one person in your group will need to research what's available and how to get it.

'Fundraising for your Transition Group' by Transition Network Funding Manager, Nicola Hillary, may be useful to you: https://app.box.com/files/0/f/4134516245/Stage_1

Outside of the traditional sources of funding for community groups, you may also consider crowdfunding. Transitioners, such as the founding Transition Free Press (www.transitionfreepress.org) team, have had some positive experience with BuzzBnk.org, a social enterprise aiming to support community projects.

BuzzBnk.org is not the only crowdfunding platform available. Be sure to check out REconomy.org's listing of 40 crowdfunding platforms, here: www.reconomy.org/top-40-platforms-for-crowdfunding-social-change/

Group or Sub Group Activity #1: Mind mapping potential funding sources

Preparation: Research potential sources of funding, including local sources.

Materials: Flip chart paper and pens.

Duration: 30-60 minutes

Objective: To tap the 'collective genius' of your group, prepare for fundraising plan.

What to do: Brainstorm and create a 'mind map' of your potential funding sources. Brainstorm with participants all the possible sources of funding, including your own TI, local authorities, local companies, foundations and trusts, wealthy individuals, fundraising events, UK and EU sources, crowdfunding, etc. Have you included the results of your action research? Left no stone left unturned? After exhausting your list, identify the most likely and least likely sources worth pursuing. Work informally in the group or have participants use dots or 'post it' notes to signify their preferences.

Additional

Resources: Need help with your 'mind mapping' skills? Check out these resources and examples for help:

http://permaculture.wikia.com/wiki/Mind_map

<http://www.mind-mapping.co.uk/make-mind-map.htm>

<http://www.slideshare.net/fusunke/sustainable-living-mind-maps>

Sub Group or Individual Activity #2: Producing your fundraising plan

Preparation: Reference the results of action research and mapping exercise

Materials: n/a

Duration: 2-3 hours

Objective: The purpose here is to improve your chance of successful fundraising.

What to do: Develop an action plan for securing the funds you will need during the course of your Economic Blueprint process. Keep it simple and remember, the most effective plan indicates who is going to do what, when. This plan may span a short period of time, focused on securing all funds necessary, or may be phased over the course of the EB process. When your plan is complete, have your group review and agree the plan.

Additional

Resources: Need some help with developing a fundraising plan? This may help:

<http://www.fundingcentral.org.uk/page.aspx?sp=6313>

Deepening the context for your project plan:

Key objectives: map and understand your allies; anticipate future communications

Group Activity #1: Mind mapping your allies and supporters

Preparation: Think about your potential allies for this work, key influencers, those with skills or who could offer in-kind support, key networks.

Materials: Flip chart paper, pens.

Duration: 30-60 minutes

Objective: To tap the 'collective genius' of your group, identify key members of your community, potentially to feed into your project plan.

What to do: Create a mind map of the organisations and key individuals in your community who could support this work. Ask these questions and group the answers on your mind map. Who are the allied organisations, those who would have a stake in the project? Who are the key influencers, those who are held in high regard, with a strong network and interesting connections, who might support your work? Who are the organisations or individuals who might have important skills or expertise? Who are those who might have funds or in-kind support for this project or its outcomes? What are the important networks in the community? Who might we want to influence with this work? Who might be obstacles or who might be threatened by this work?

Additional

Resources: Need help with your 'mind mapping' skills? Check out these resources and examples for help:

http://permaculture.wikia.com/wiki/Mind_map

<http://www.mind-mapping.co.uk/make-mind-map.htm>

<http://www.slideshare.net/fusunke/sustainable-living-mind-maps>

Group, Sub-group, or Individual Activity #2: Communications groundwork – more mapping!

Preparation: Think about audience groups and messages you will want to communicate during the course of this project, especially once major milestones have been completed.

Materials: Flip chart paper, pens.

Duration: 30-60 minutes

Objective: To tap the ‘collective genius’ of your group and proactively anticipate communications needs.

What to do: This activity is closely related to the previous mapping activity. You may combine them, however adding too many dimensions to a mapping exercise can add unnecessary complexity.

Brainstorm and create a mind map of the key audience groups. Ask these questions and add the answers to your mindmap: who are our key audience groups for communicating about this work? Are there differences and/or similarities with the “allies and supporters” map we created in Activity #1, above? Schools? Local authorities? Institutions? Clubs and associations? Media outlets?

- Next ask, what are the salient needs of these groupings? Map the answers.

- Next ask, what are the relevant values or worldviews held by these groups? Map the answers.

- Next ask what the important messages overall and for each group might be and map them. Can you associate messages with key audience groupings?

Finally, discuss how these insights might feed into a communications strategy and plan. Plan the plan, that is, discuss when you might develop your communications plan and who will lead on it. Agree next steps.

Additional

Resources: Want to dive deeper? It may be useful to create a ‘message matrix’ to map key messages to your different audience groups. You can download a simple matrix template, here:

http://www.northskynonprofitnetwork.org/sites/default/files/documents/Message_Matrix.pdf

Stage 2 – Recruiting your stakeholders

Engaging and working with the key stakeholders in your local economy is an important part of the Economic Blueprint process. If you’ve already “mapped the stakeholder terrain”, then you probably also know who you want to recruit. It may be that your Transition initiative or community group is widely known and enjoys the support of a wide range of local business leaders, local authority policy makers and planners, key non-profits, etc. If not, you may find that it takes time to build trust with new and unfamiliar people. Furthermore, you may find that many of the organisations and individuals that you want to approach may not share Transition assumptions, values, or analysis. The activities in this section will help you develop approaches you may

need to successfully engage and recruit an effective 'stakeholder forum' for your Economic Blueprint.

Recruiting your stakeholders:

Key objectives: understand values and frames, craft key messages, create communications tools, if necessary

Group Activity #1: Stakeholders and messages

Preparation: Your potential stakeholders will be a diverse group – think about how to best approach them.

Materials: Flip chart and pens.

Duration: 30 - 60 minutes

Objective: To practise different messages and recruitment pitches.

What to do: Some of your potential stakeholders will be keen allies eager to participate. Others may be important to recruit, but may represent organisations that your TI has had little contact with and may even hold opposing views about economic development. This may be true, for example, of representatives of your local council and yet it's vital to get their participation. Role playing offers an opportunity to occupy points of view other than your own, and may provide some insight into how you might approach your prospective stakeholders.

Pair up with one person taking the role of 'recruiter' and the other the role of one of the prospective stakeholders you have identified.

For five minutes, the 'recruiter' will try to convince the other to become a member of the stakeholder forum. After five minutes, switch roles and do it again for five minutes. Repeat as necessary until your group has covered each of the individuals you assume to be the most challenging stakeholders to recruit.

Next, share your experiences with the group, capturing key learnings and messages on the flip chart paper. Are key messages emerging? Can you associate key messages for specific prospects? Do these messages differ depending on the prospective stakeholder? What do you assume, rightly or wrongly, about their values or worldviews? Does this experience indicate how best to approach your prospects? Will you need a formal or informal approach? Will you need several meetings or simply pop off an email? Will you need tools, such as a one-page summary or Powerpoint presentation?

If you are feeling ambitious, take it one step further. Draft a recruiting pitch and create a message matrix that matches key messages with prospective stakeholders.

Additional

Resources: Want to dive deeper? Read the Common Cause Handbook, a short report that offers valuable advice about the roles values and framing play in communications. Download it here: <http://valuesandframes.org/>

Group or Sub Group or Individual Activity #2: Stakeholder recruitment plan

Preparation: Think about how you are going to recruit your stakeholders and who will do it

Materials: n/a

Duration: 15 minutes

Objective: To explicitly acknowledge who is going to approach prospective stakeholders, when, and

how best to do so.

What to do: How best to recruit your stakeholders and who best to do it? If you have existing relationships, it may be as simple as making a phone call or meeting for coffee. On the other hand, it may require building familiarity and trust through several meetings. Will you need a briefing sheet? A Powerpoint presentation? If so, who will complete those tasks and when? If necessary, create a document that addresses these questions, including a timetable or schedule.

Group or Sub Group or Individual Activity #3: Produce communications tools (if necessary)

Preparation: Review learnings from previous activities, assemble other resources as required

Materials: TBC

Duration: 2-8 hours

Objective: To create a tool(s) to support your recruiting efforts

What to do: You may have determined that a tool or set of tools will be necessary in order for you to recruit certain of your prospective stakeholder forum members – or perhaps all of them. What you need is up to you to decide.

It may be as simple as producing a one-page briefing sheet, or talking points, a script anyone can follow while on the phone, or simply using summary reports as produced by other communities, such as Totnes, Hereford, or Brixton.

Stage 3 – Leading toward a shared vision

This phase of the economic blueprint process presents an interesting and important challenge - leading your stakeholder group toward a shared vision of a transformed local economy. Your EB team may already have the leadership skills and experience to do the job. Even so, it may well be worth refreshing your knowledge of important economic topics, as well as good facilitation practice. This section provides two sets of activities to support you - Talking About the New Economy and Skilling Up for Facilitation.

Talking about the new economy:

Key objectives: improve familiarity with key economic concepts

Group or Sub Group Activity #1: The ‘new economy’ – what is it?

Preparation: Review relevant ‘new economy’ issues and concepts. Follow links for helpful resources:

<http://www.reconomy.org/>

<http://www.neweconomics.org/publications/entry/a-green-new-deal>

Materials: N/A

Duration: 1-2 hours (possibly several hours of prep time)

Objective: To create familiarity with relevant ‘new economy’ issues and concepts

What to do: If the old economics is the ‘dismal science’, then let’s make the new economics full of life. This activity is potentially for your whole group, but especially for those taking part in the

‘stakeholder visioning workshop’. First, make sure those taking part are familiar with the concepts below. Divide up the research or not – that’s up to you. Ideally meet in a comfortable place, such as your local pub, a living room, or someplace else. Having a glass of beer or wine, or a cup of tea or coffee, can help oil the discussion of concepts like:

- Transition Enterprise
- the ‘circular economy’
- ‘relocalisation’
- economic resilience
- inequality
- local multiplier effect
- triple bottom line

Additional

Resources: The work of Manfred Max-Neef is attracting the interest of a growing number of activists working on local economic development issues, as well as ‘wellbeing’.

Max-Neef developed a theory of human needs and satisfiers that forms the basis of an approach to sustainable economic development which he described in the book, Human Scale Development. Follow these links for more information:

http://en.wikipedia.org/wiki/Manfred_Max-Neef

<http://www.max-neef.cl/>

Skilling up for facilitation:

Key objectives: acquire or improve facilitation skills

Action

Research: This activity is for the member(s) of the group who will participate in facilitating the vision session. It is strongly recommended that a facilitator with experience leads the session, however this activity can serve as a refresher or to support less experienced co-facilitators. This is an action research assignment. The resources below may help you link with useful information. If you require more support and this online information is inadequate, you may choose to enrol in more in-depth training.

<http://www.mindtools.com/pages/article/RoleofAFacilitator.htm>

<http://www.seedsforchange.org.uk/>

<http://rhizomenetwork.wordpress.com/>

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