



# PHASE 1 | LAY THE GROUNDWORK

## Step 2 | Create a Work Plan

Developing a blueprint for success



**cooperative  
governance**  
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REPUBLIC OF SOUTH AFRICA





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## Executive Summary

This document outlines the essential steps in creating a comprehensive Work Plan for the Small Town Regeneration (STR) initiative. Step 2: Create a Work Plan, details the processes involved in determining project goals, designing an engagement plan, and developing a detailed work plan and budget to ensure effective implementation and sustainability of the STR projects.

**Determine and Refine the STR Project in Your Town:** The first step in creating a Work Plan involves determining the project goals and refining the scope of the STR project. This requires an open discussion between the Municipal and Community Task Teams to define the project's objectives, desired outcomes, and impacts. Understanding the project's goals and scope is crucial for managing the town's regeneration efforts and ensuring alignment with community needs.

**Design an Engagement Plan:** An Engagement Plan is vital for involving stakeholders throughout the project. It outlines how to interact with and involve various stakeholders, including government agencies, community members, and local organisations. Effective engagement ensures stakeholders are identified, their needs understood, and communication strategies are in place to build positive relationships and manage expectations. This plan should focus on involving everyone, addressing what matters most to the community, and playing the long game to build capacity and sustain engagement.

**Create a Detailed Work Plan and Budget:** The final step involves creating a detailed Work Plan and budget. This includes outlining project phases, identifying milestones, and determining the timing and budget for each task. A well-structured Work Plan ensures that all activities are carefully planned and coordinated, allowing for the efficient use of resources and effective project management. It is essential to allocate the budget across all project phases and consider potential partnerships and community resources to support the project.

The steps outlined in Step 2 are critical for the successful implementation of the STR initiative. By establishing clear goals, engaging stakeholders effectively, and creating a detailed Work Plan and budget, municipalities can ensure the sustainable development of small towns. These efforts foster collaboration between officials, politicians, and the community, promoting shared ownership and long-term success in regeneration projects. The lessons learned from the piloting process in select towns provide valuable insights for future regeneration efforts, ensuring meaningful and sustainable transformation.

## Step 2: Create a Work Plan

### Task 2.1 | Determine and refine the STR project in your town

A work plan is crucial for efficient project management, and it also serves as a communication tool, allowing individuals to understand what will happen and why. The work plan should outline specific activities, tasks, milestones, timelines, and budgets.

To develop a Work Plan, it is key to clearly understand the project's why (goals) and what (scope, phase, and milestones). This will help manage your town's regeneration efforts. This section will address these elements.

#### Action 1 | Determine project goals

There is a reason why you want to get involved in the regeneration of your town: What is it? The first step is to clearly describe the project goals. This will require an open discussion between the Municipal and Community Task Team, answering big questions such as what our efforts will accomplish, to whom does it matter, etc., as it will help you understand the purpose of your efforts.

#### Questions to ask:

- Is there a community-wide problem/project that we aim to address?
- How will the project benefit the community?
- Why do we need to engage the community?
- What specific action(s) do we want decision-makers to take?
- What role will the results play in shaping future decisions and/or policies?

As you consider these questions, make sure the team is clear that specific efforts, such as upgrading a park, could be part of the reason you want to do this project.

There are two categories into which goals can be organised, namely:

**Outcomes** are shorter-term results you want to achieve within two to three years. They are tangible (for example the development of a landscape design plan for the business district) and measurable (for example number of people who participate in project activities). Desired outcomes need to be realistic, in other words, what's actually possible in two years, but also meaningful, will it benefit the community.



**Impacts** are the longer-term changes that can occur in your community, think three to ten years. They can be less tangible and measurable, such as a greater sense of community, which will only be evident after many projects have been completed.

### Point to ponder on

Remember, the key to successful collaboration is open communication, mutual respect, and a shared vision for the future.

Don't confuse goals with projects. Determine what you wish to achieve and why you want to achieve it.

## Action 2 | Establish scope

The purpose of a project scope is to clearly define the deliverables, tasks, deadlines, and resources in line with the project's goals. A well-defined project scope is crucial for keeping contributors aligned, managing stakeholder expectations, facilitating budgeting and scheduling, preventing scope creep, and serving as a reference document throughout the project lifecycle.

Existing projects in your community may inform your project scope. Taking inventory of these initiatives will assist you in determining where your work fits into the broader community picture. Furthermore, this will build on existing efforts and pre-empt misperceptions, like "we've already done that," and tie into current, complementary initiatives and partnerships.

### Questions to ask:

- Does a clear start or end point exist for this project? Does the timeline provide an adequate or appropriate timeline to achieve our goals? Or resolve identified issues?
- Does the project have a defined geographic location?
- What other community projects (past and present) could inform or affect this effort?
- How will you know that the formal project process has concluded (for example, with a final report, a policy decision, a vision statement)? What is the endpoint?
- What does the transition from the conclusion of the formal process into stewardship look like?

## Task 2.2 | Design an Engagement Plan

An Engagement Plan is a strategic document that outlines how you plan to interact with and involve stakeholders throughout a project or initiative. Stakeholders are individuals, groups, or entities that



have an interest or concern in the outcome of the project, and they can include government agencies, community members, and more.

An engagement Plan ensures that stakeholders are identified, their needs and expectations understood, and effective communication and collaboration strategies are in place. The plan helps build positive relationships, manage expectations, and address potential conflicts.

### **Point to ponder on**

It is critical to understand that simply delivering information or getting feedback on a preconceived idea is not enough. Good engagement asks participants to help develop the information and generate ideas. It is also unacceptable to ask for input and then do nothing with it. Meaningful engagement uses participants' ideas and feedback to understand issues better, clarify priorities, and evaluate options.

The engagement objectives for Phase 1 of the STR are:

- Understand who is in your community and who you want to reach and build relationships with people connected to missing groups and voices.
- Find volunteers and resources to join the team or help make your project happen, as well as a Community Task Team Chairperson who keeps efforts moving forward.
- Build excitement and awareness for the project and gather early input about your town.
- Develop an identity and brand for the regeneration efforts of your town that people can recognise and associate efforts to the regeneration process.

In line with the STR principles, the following basic concepts should guide your engagement efforts:

### **Involve everyone**

1. Hold events and share information at places where people frequently gather, such as shops, restaurants, online platforms such as Facebook, and during organised community meetings, such as ward meetings, sports events like rugby games, within schools, and so forth.
2. Use your existing networks, organisations, and known locations to connect with specific audiences.
3. Make your activities easily accessible, for example, transport for senior citizens, childcare, etc.
4. Make the activities suitable for specific demographics and age groups.
5. Make the timing and location work for the people you want to reach.
6. Pay attention to who shows up and even more to who doesn't.



## Focus on what matters most.

1. Find out what matters most to the community and use this information to frame conversations.
2. Participating is more compelling than being informed. Information is important, but most people want to be involved more actively. At each opportunity to connect with people, don't just inform—allow for feedback or activity.
3. Use language that resonates with people. Avoid jargon and technical terms, as these can be communication barriers. Where possible, connect with people in their mother tongue.

## Play the long game

1. Always create opportunities to build capacity through training and cultivating new volunteers and leaders.
2. Allow for relationship building. This can be a purpose-built activity or part of a larger event. Sometimes, it is as easy as allowing people to introduce themselves.
3. Always ensure events are meaningful and interesting enough for participants to return.
4. Be transparent about the process, the feedback, and how people's participation will influence the decisions. Share information in ways that allow people to hear from each other.
5. Manage expectations. To avoid disappointment with certain slow-moving processes, all involved must understand the time and effort required to bring about change from the onset. Do not overpromise.

With the basics outlined above, there are three things to consider when developing your engagement plan:

- Your specific objectives for each phase or task of the process.
- The questions you want to answer.
- The engagement activities should match the audience you are trying to engage.

A stakeholder database is proposed to be prepared as part of the Engagement Plan. Typically, stakeholders can be mapped at the following levels:

- |                                        |                                   |
|----------------------------------------|-----------------------------------|
| • Provincial government                | • Community Task Team             |
| • District Municipality                | • Local Business Entrepreneurs    |
| • Local Municipality – administrative  | • NGO's and community groups      |
| • Infrastructure and service providers | • Investors and developers        |
| • Mayor and councillors                | • Educational and cultural groups |
| • Municipal Task Team                  | • Property owners                 |





- Youth and students
- Senior citizens
- Tourism boards
- Media and Communication Outlets
- Local farmers and agricultural groups
- Other

How you map your stakeholders is dependent on your specific town environment. However, the above gives a good example of who can be included in the Engagement Plan.

### Questions to ask for the Engagement Plan for Phase 1:

- Why are we doing this?
- Has anything like this been tried before? If so, was it successful, or did it fail, and why?
- Who lives here?
- What are the demographics of our community need representation on our team?
- Who should be involved in this process?
- How do people learn about what's happening here?
- Who wants to help?
- What kind of challenges or obstacles should we expect?
- What groups exist that we can present this idea to for early support?

### Action1 | Recognise network connections

As you embark on developing your Engagement Plan, mapping the links between various community networks and gaining insights into the activities of different groups and organisations will become crucial. This expanded understanding will likely prompt the need to prioritise your community outreach and engagement efforts, recognising the inherent limitations in addressing every aspect comprehensively.

An effective approach to prioritisation involves assessing the level of effort required to engage different groups. For instance, engaging with business owners may be of significant importance. Still, if there is a likelihood that they will readily participate with minimal effort, it allows for a more streamlined outreach strategy. This strategic allocation of resources and focus ensures that efforts are concentrated where they can yield optimal results. By understanding the dynamics of engagement with different groups, you can allocate your time and resources efficiently, creating a more targeted and impactful community outreach plan.

### Practical tip

A simple way to do this is by writing your networks on individual sticky notes and putting them up on a wall. Then, draw lines to indicate connections between them. The connections might represent people involved with both networks or it could be a formal relationship between the networks, like a committee member that is also a member of a local faith-based group or a local parent teacher organisation.

## Action 2 | Categorisation of stakeholders

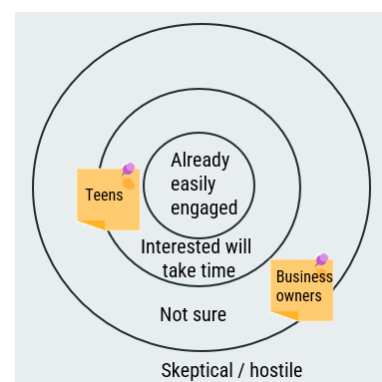
When engaging stakeholders, it's essential to categorise them into distinct groups based on their likelihood of participation and level of interest. These groups are:

- **Already or easily engaged:** Identify groups requiring minimal participation effort. These stakeholders will likely be readily involved, allowing for efficient engagement without extensive outreach.
- **Interested but will take some work:** Target groups with potential interest in your project may require specific and tailored outreach efforts to participate actively. Recognising their interest is the first step, and strategic engagement can unlock their full potential.
- **Not sure of interest:** Allocate time upfront to gauge the level of interest among these groups. A proactive approach is needed to understand their concerns and motivations, paving the way for effective engagement strategies to encourage participation.
- **Sceptical or hostile:** Despite initial scepticism or hostility, exploring the key issues with these groups early on is valuable. This exploration helps understand their perspective, enabling the development of engagement strategies that address their concerns and foster a more collaborative relationship.

By following this structured approach, you can systematically address stakeholders at different levels of engagement, tailoring your efforts to meet their specific needs and concerns. This categorisation allows for a more strategic and cohesive engagement plan, ensuring stakeholders are actively involved and aligned with the project's goals.

### Practical tip

You can do this exercise by writing your stakeholders on a sticky note and then placing each note in one of the categories described above.





### Action 3 | Identifying engagement opportunities

When developing engagement approaches, demographics and networks must be considered. Begin by conducting a thorough stakeholder mapping, assessing the various demographics within your community, and understanding the existing networks. This analysis lays the groundwork for the subsequent steps in your engagement strategy.

Once you clearly understand demographics and networks, move on to brainstorming effective ways to reach people where they are comfortable. This includes considering the format of engagement that aligns with their preferences and feels accessible. Incentives play a crucial role in encouraging participation, and their design should be intentional, catering to the specific needs of your target demographic.

For instance, free food can be a universally appealing incentive, while free childcare becomes pivotal when engaging with young families. Tailoring incentives to the unique needs of residents, such as providing transportation for those with limited incomes or seniors, can significantly impact participation rates. Fun events, like raffles or door prizes, can attract a younger audience, adding an element of excitement to the engagement process.

Awareness of each target audience's work schedule and consideration of conflicting community events are integral components of maximising attendance. This strategic approach ensures that engagement efforts are well-timed and don't clash with competing commitments.

Finally, seizing opportunities to engage with people throughout the regeneration process is an ongoing and essential aspect of community building. Building relationships and sustaining active participation contribute significantly to the success of small-town regeneration initiatives. The flow from demographic consideration to tailored incentives and strategic scheduling creates a comprehensive and integrated approach to community engagement.

The following table (see overleaf) provides an example of how demographics, networks, and network connectors can be aligned with the communication channel and engagement opportunity.



## Examples of demographics, networks and network connectors, conversation venue and communication channel and ENGAGEMENT OPPORTUNITY

| Demographics | Community networks | Network connectors                           | Venue for conversation | Communication channel                        |
|--------------|--------------------|----------------------------------------------|------------------------|----------------------------------------------|
| Homeless     | Faith-based groups | Sam (deacon of the church with soup kitchen) | Church cafeteria       | Phone and email to Sam and his word-of-mouth |

**ENGAGEMENT OPPORTUNITY:** Group conversation/notes capture

It may not be comfortable for vulnerable populations to be video or audio-recorded. Consider using a notetaker to record what is heard. However, if appropriate, video can be a powerful way to share these stories among attendees and with the greater community. Use quick ways to capture information and think about how you can share that information later.

### Task 2.3 | Create a detailed work plan and budget

The final details in mapping out the process are to outline the project phases, determine the milestones, figure out the timing and allocate a budget. Be sure to specify the what, why, when, where, who and how much for each task.

These activities will require a back-and-forth between overall design and communication planning. You might start by including all the bells and whistles, only to later realise that the budget can't afford them. Remember that the budget should be spread across all phases to support the entire project.

#### Points to ponder on

Activities must be carefully spread out. Allow enough time in between big events to process feedback, do research and develop new material.

Coordinate activities with other community events and activities such as holidays, a sports day, agricultural show, etc.

Don't overlook the small stuff. There is just as much work behind the scenes as there is in running events and outreach activities. Regular small email blasts or social media posts, documenting meetings, and maintaining relationships take time and energy.



## Action 1 | Outline project phases

Project phases are smaller portions representing distinct goals or milestones in the larger project lifecycle. They provide a structured process that helps ensure projects are carried out effectively and efficiently, minimising risks and maximising outcomes. The project phases allow you to track progress and identify potential issues early on by breaking the project into smaller, more manageable parts. This helps avoid costly mistakes and delays that could prevent your project from its estimated budget and schedule. In addition, project phases help improve communication between team members by clarifying roles and responsibilities. Defined activities/tasks and objectives make it easier for your project team members to stay on track and work together efficiently.

### Questions to ask:

- What are our project phases?
- What do we want to accomplish in each phase of the project?
- What specific outputs do we need from each phase before proceeding to the next phase?
- Is there a clearly defined beginning and end for each phase?
- Are the names of each phase resonating with or understandable to people in our community?

## Action 2 | Identify milestones

Project milestones are significant markers in a project's life cycle, indicating crucial stages of progress, such as the start and finish of the project or the completion of major work phases. They play a vital role in project management by facilitating coordination, aiding in planning and scheduling, enabling more accurate time estimation, and providing a framework for tracking progress. Milestones help break down project phases, making it easier for project teams to understand objectives and plan and execute tasks. Overall, project milestones are powerful tools that contribute to keeping work on track in project management.

### Questions to ask:

- How will you know if your project has been successful?
- What milestones can you identify during the project at specific phases?
- What will you measure at the project's close, two years later, or ten years later?
- Are your measures easy to quantify or assess?
- Do you need to know the baseline for any measure (for example, the number of people who previously engaged in a similar process)?



The following template can be used to kick-start your Work Plan. It comprises key elements such as the main and sub-tasks with identified deliverables and timeframes.

| Phase 1   Laying the Groundwork            |            |           |           |             |           |
|--------------------------------------------|------------|-----------|-----------|-------------|-----------|
| MAIN TASK                                  | ACTIVITIES | RESOURCES | MILESTONE | DELIVERABLE | TIMEFRAME |
| TASK 1   Project Inception and Work Plan   |            |           |           |             |           |
| Task 1.1. Project inception and Management |            |           |           |             |           |
|                                            |            |           |           |             |           |
|                                            |            |           |           |             |           |

### Action 3 | Determine a budget

You will most likely start the process in your town without a budget. That, however, is not a restriction but an opportunity to build partnerships and use resources within your community. There are steps that you can take to manage the situation effectively. Should you start the project without a budget, here's some guidance on what to do:

1. **Immediate assessment:** Conduct a thorough assessment of the project's scope, requirements, and potential costs. Identify essential resources, both tangible and intangible, that are needed for project completion.
2. **Identify funding sources:** Explore potential sources such as internal funds, grants, sponsorships, or external financing. Determine whether any existing budgets or funding streams can be redirected or repurposed for the project.
3. **Prioritize project components:** Prioritize project components based on their criticality to the project's success. Identify essential tasks and resources that must be secured immediately and those that can be phased in as additional funds become available.
4. **Cost estimation:** Create a detailed cost estimation for the project. Break down expenses into categories, such as personnel, materials, equipment, and overhead. This will help you understand the overall financial requirements.
5. **Negotiate and barter:** Explore opportunities for negotiation and bartering (exchanging goods, services or resources). Sometimes, creative arrangements can be made to obtain necessary resources without immediate financial outlays.
6. **Seek internal support:** Engage with internal stakeholders and decision-makers to secure support for the project. Make a compelling case for the project's value and potential benefits to the municipality, town and community.



7. **Incremental funding:** Consider implementing the project in phases or increments, securing funding for each phase as you progress. This approach allows you to demonstrate progress and generate additional support for subsequent stages.
8. **Explore crowdfunding or donations:** If the project aligns with a cause or community interest, explore crowdfunding platforms or seek donations to gather financial support from a broader audience.
9. **Cost-sharing or partnerships:** Explore opportunities for cost-sharing or forming partnerships with other organisations or entities that may share an interest in the project's success.
10. **Document everything:** Keep detailed records of all financial transactions, agreements, and commitments. Accurate documentation will be essential for accountability and future financial planning.
11. **Regular reporting and communication:** Communicate regularly with stakeholders, including those providing funding or support. Keep them informed about progress, challenges, and resource needs.
12. **Iterative budgeting:** Develop a detailed budget for the remaining project phases as funding becomes available. Continue refining and updating the budget as the project progresses.

## Example of bartering between a municipality and community

### Scenario: Community Park Beautification Project

#### Municipality's Need:

- The municipality is responsible for maintaining public spaces, including community parks. One of the parks in the town requires landscaping and beautification, but the municipality has budget constraints and limited resources for this project.

#### Community Organisation's Capability:

- A local community organisation, "Green Thumb Community Group," has a mission to promote environmental sustainability and community engagement. They have skilled volunteers, gardening tools, and expertise in landscaping.

#### Bartering Agreement:

The municipality and the Green Thumb Community Group entered into a bartering agreement to enhance the park. The agreement outlines the following:



- The community organisation will provide skilled landscaping, gardening, and park maintenance volunteers.
- The municipality will grant the community organisation access to a vacant meeting room in a municipal building for monthly meetings.
- The municipality will waive any permit fees associated with the community organisation's events in the park.
- The municipality agrees to acknowledge the community organisation's contribution with a plaque in the park.

**Execution of the Project:**

- The community organisation mobilises volunteers, who work weekends to plant flowers, trim hedges, and maintain the park. They bring their gardening tools and expertise.

**Municipality's Contribution:**

- The municipality provides access to the meeting room, waives permit fees, and ensures that the community organisation's efforts are recognised within the park.

**Benefits:**

- The municipality gets a beautified park without incurring additional costs, utilising the community organisation's resources.
- The community organisation gains access to a meeting space, saves on permit fees, and achieves its mission of contributing to the community's well-being.

**Community Engagement:**

- The project serves as a platform for community engagement. Residents may also participate in volunteer activities, fostering a sense of community pride and ownership.

**Documentation:**

- Both parties maintain documentation of the agreement, including details of services exchanged, the duration of the agreement, and any specific terms.
- This bartering arrangement benefits the municipality and the community organisation by leveraging each other's strengths and resources. It exemplifies how local entities can collaborate to enhance public spaces and contribute to the community's overall well-being through non-monetary exchanges.



## Conclusion

When executed with diligence and inclusivity, the steps outlined in Step 2 facilitate effective collaboration between officials, politicians, and the community, fostering a sense of shared ownership and commitment to sustainable development during the piloting process.

In essence, Step 2 in the pilot towns was a testament to the efficacy of the approach outlined in the Guidelines. By laying a robust foundation through careful planning, stakeholder engagement, and strategic communication, small-town regeneration endeavours are poised for long-term success and community prosperity. As such, the lessons learned from piloting in the select towns will continue to inform and guide future regeneration efforts, ensuring that each step is meticulously executed to achieve meaningful and sustainable transformation.