

Oregon Broadband Strategic Planning Project Planning Template

Note: All materials—request-for-participation letters, templates, drafts, participant role descriptions, meeting agendas, sector discussion instructions—were developed by the Project Management Team to be used, and customized as needed, for each community. Please click on the links in the tool boxes to open the documents. For additional resources and to view other Oregon Community Strategic Broadband Plans please visit the [Project Web site](#).

Month 1

Step One

Engage Local Broadband Strategic Planning Leadership

Each community will need to engage community leaders to serve in key roles in the Strategic Planning process. It is anticipated that commitment to filling these roles will be made in the initial application.

Key roles are:

- **Sponsor**—Mayor, Council Member, County Commissioner, Judge or other honored citizen who can garner interest and participation in the Broadband Strategic Plan. The role of this individual is primarily honorary. Their key responsibility is to invite participation and highlight the civic value of the project.
- **Convener or Co-Conveners**—Individual(s) that serve as host for the entire project. May be the Sponsor or another individual(s) with visibility and regard in the community who will be available to attend all meetings.
- **Sector Hosts**—(optional) Individuals that can assist the project manager with identifying and inviting representatives for each sector. The sectors are:
 - Economic Development/Business (*large and small business, including home-based business*)
 - Community Development (Government and Non-Profit)
 - Education and Healthcare (*2 sectors but will meet and be hosted as one*)
- **Local Project Manager**—Individual who is responsible for overseeing the project outcomes and producing the strategic plan document drafts and final draft.
- **Local Project Assistant**—Individual who can provide logistical support to the project.

Tool Box 1
[Kickoff Meeting Agenda](#)
[Planning Flow Chart](#)
[Project Charter](#)

Month 2-3

Step Two

Conduct Strategic Planning Pre-Work

Accomplished locally at the direction of the Convener by the Project Manager and Project Assistant.

- Develop and approve a project charter that includes firm dates for sector and plenary group meetings.
- Examine and if needed, update the Briefing Book.
- Identify and assemble any prior reports, plans relative to broadband access, adoption or utilization in the community, or related plans such as Community Master Plans, Economic Development Plans, or Education, Health, Transportation or Public Safety communications plans.

Tool Box 2
[Participant Invitation Letter](#)
[Participant Nomination List](#)

Step Three

Organize the Events

The Project Manager works with the Local Project Assistant to organize logistics e.g., follow-up on participation requests for information create participant lists and contact information, events scheduling, locations, refreshments, etc.

- The Project Manager works with the Convener to issue the invitation to all participants approximately two months before the first scheduled meeting.
- Approximately two weeks before the scheduled sector meetings, send out the workshop packet, containing the meeting agenda and cover letter with instructions on reading briefing book sections.

Month 4

Step Four

Broadband Planning Sector Workshop Sessions

A 3-hour workshop-format session for each individual sector:

- Work in sector-specific groups, with each sector addressing these deliberative questions:
 - ✦ *What goals, programs or functions in this sector, (existing, currently in development or envisioned for the future) are dependent on access to and ability to use broadband?*
 - ✦ *Are there constraints to obtaining adequate capacity, innovation and competition in networks, devices and applications? Are barriers anticipated in the future? What are those constraints or barriers?*
 - ✦ *What is at stake? Are there significant risks or costs of broadband inadequacy in this sector?*

The Project Manager facilitates the session and the administrative assistant captures the work of each sector in detailed reports so that both sector-specific issues and issues that cut across all sectors can be identified.

Results of Session #1 will be sent to participants for their consideration and comment prior to Session #2. A First Draft Plan will be issued prior to the session for revision at Session #2.

Tool Box 3

[Participant Cover Letter](#)

[Sample Sector Meeting Agendas](#)

[Broadband Briefing Book](#)

Tool Box 4

[Sample Conceptual Draft](#)

[Sample Meeting Notes](#)

[Sample Plan “Outline” Draft](#)

Month 5

Step Five

Broadband Planning Plenary Session

A 3-hour Summit format session to:

- Recap the results from Session #1.
- Work in sector-specific groups to address these deliberative questions:
 - ✦ *What primary broadband adoption goals should be addressed in the Broadband Strategic Plan?*
 - ✦ *What specific approaches should be taken to drive those goals?*
 - ✦ *What is the nature of each approach, i.e., Study? Advocate? Legislate? Do? Other?*
 - ✦ *How should these approaches be implemented?*
 - *Who takes the lead?*
 - *Who pays/how paid for?*
 - *Within what timeframe?*
 - ✦ *Do the overarching plan elements (Scope, Goals, Key Strategies, Metrics and Requirements for Success) capture the planner’s priorities?*
 - ✦ *Do the Recommendations/Milestones listed under each Key Strategy lead logically to the achievement of the goals? Are any key pieces missing?*

The project manager facilitates the session and the administrative assistant captures of the work of the plenary session so that both sector-specific issues and issues that cut across all sectors can be identified.

Tool Box 5

[Sample Plenary Meeting Cover Letter](#)

[Sample Plenary Meeting Agenda](#)

Month 6

Step Six

Plan Drafting and Review

The Project Manager creates a draft final plan that highlights a) sector-specific priorities and b) priorities common among all or most sectors.

Conveners deliver feedback to the project manager.

If this review and reveals any conflicting perspectives or priorities, the convener and project manager will conference to resolve issues.

Tool Box 6

[Sample Plan Final Draft](#)

[Community Evaluation Form](#)

Step Seven

Finalized Broadband Strategic Plan

A final version of the Broadband Strategic Plan is sent to participants.

The Sponsor and/or Convener are encouraged to present the plan for adoption by the local government.

Step Eight

Evaluation

Participants are sent a survey and asked to evaluate the process and product.