

THE CED WHEEL CHECKLISTS

A GUIDE FOR COMMUNITY ECONOMIC DEVELOPMENT

The following checklists will help your CBO pinpoint the tasks it must undertake as it plans, implements, evaluates, and grows its CED work. The tasks are expressed as questions and arranged according to the appropriate component and phase of the CED process.

Y	Yes
N	No
P	Partly
DK	Don't Know

To use a checklist, read each question and choose which of the four brief responses is most appropriate: “yes,” “no,” “partly,” or “don’t know.” Write any further observations you may have in the space marked “Problems/Highlights.” Don’t be afraid to use extra pages to document your answers.

The checklists are meant to be a framework - not a blueprint - for your CED work. You must decide whether and to what degree each question is relevant to your specific CED effort. But while a flexible approach is certainly preferred, do make an extra effort to consider each question seriously. CBOs that treat these issues lightly are far more likely to experience setbacks in the CED process.

To make your work easier, it is strongly recommended that you capture on paper your process through each of the various milestones. This will enable your group to agree on what has been decided and accomplished, and can be used to inform and update CED stakeholders as the CED process unfolds. Moreover, with any luck, by the time your group reaches Phase #4 (Detailed Planning and Mobilizing Resources), it will already have in hand the majority of the business plan or proposal. Good luck!

BEFORE YOU BEGIN - SOME PRELIMINARY QUESTIONS

This section is important as it sets the context for your organization's consideration of CED. Document your answers to each of the questions using any examples or information you need to support your responses. It should only require a couple of pages. The information will be invaluable in phases 1 and 4 when you making the case to your community and other organizations for undertaking CED.

	Y	N	P	DK	PROBLEMS/HIGHLIGHTS
1. Do you have a clear understanding of the community for/with whom you work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Do the community members for/with whom you work generally have low incomes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Do the mission & goals of your CBO* relate to reducing poverty? If so, how? If not, why is this a priority for your organization now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Is your CBO already involved in CED? If so, how? If not, why is it now considering CED?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. If you answered "yes" to #4, are your projects successful? (Don't answer if you said "no" to #4.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

*CBOs, short for "community-based organizations" include business centres, neighbourhood service and social service organizations, Band governments, congregations, community development corporations or financial institutions, and development associations.

PHASE 1: GETTING STARTED

ORGANIZATIONAL CAPACITY

This is perhaps the most critical section of the CED process – determining whether your CBO is suited for CED. Ask each member of your working group to carefully document each of their responses and collectively discuss the results. Clarify amongst the group where there is consensus and disagreement. With this background, your group should be able to assess whether your CBO should proceed with CED and/or what to do to increase the CBO's readiness.

	Y	N	P	DK	PROBLEMS/HIGHLIGHTS
1. Do your decision-makers have a basic knowledge of CED?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Does your CBO have experience in managing successful projects (i.e., planning, implementing, financial & evaluation reports)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Has your CBO's leadership & staff been fairly stable (experienced little turnover) in the last several years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Is your CBO willing & able to invest time & resources in CED to make it a success?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Do your decision-makers see CED as a long-term investment, not a short-term fix?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Is your CBO willing to make decisions based on solid research & planning?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Is your CBO willing to make organizational changes to ensure that its CED work is a success?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8. Has your CBO demonstrated a capacity to mobilize outside resources (e.g., financial, in-kind, or technical) to support its work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9. Has your CBO determined the technical assistance it needs in this area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PROJECT DEVELOPMENT (PHASE 1)

This section helps you identify and collect information and knowledge that can help your group make solid decisions. Document your responses. Identify key sources of information. And then describe the results of your research in a short document to help the group get a general picture of local trends, resources, and opportunities.

	Y	N	P	DK	PROBLEMS/HIGHLIGHTS
1. Does your CBO have a preference for the type of project(s) it would like to pursue?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Has a work plan been completed for conducting the planning process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Does the CBO have up-to-date data on local resources (physical, institutional, human, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Does your CBO have up-to-date data on local economic trends?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Does your CBO have up-to-date demographic data, including the constituents' skills, occupational & training preferences, & small business interests? Is it in a form which is useful for CED planning?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Has the flow of money (capital & income) to & from the community been analyzed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Has an overview of the community's economic development strategy options been completed? If so, how does the CBO's overall direction "fit" this strategy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8. Has your CBO determined the technical assistance it needs in this area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

COMMUNITY PARTICIPATION & NETWORKING (PHASE 1)

This section too is about taking stock. The net result of your work here should be a background paper on your community and key individuals and partners. If possible, document how best to get into contact with them.

	Y	N	P	DK	PROBLEMS/HIGHLIGHTS
1. Does your CBO have a strong link to the community, particularly those residents living with low incomes? If so, what/who are these links?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. In its decision-making, how does your CBO provide a voice to the community for/with whom you work ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Has your CBO demonstrated the ability to work in partnership with other organizations & individuals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Do you have solid links with people in the nonprofit, government, and private sectors? If so, what/who are these links?					
a) nonprofit sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b) government/public sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
c) private sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	