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Community Strategic Visioning as a Method to Define and Address Poverty: An Analysis From Select Rural Montana Communities

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Abstract: Community strategic visioning is a citizen-based planning process in which diverse sectors of a community collectively determine a future state and coordinate a plan of action. Twenty-one communities in rural Montana participated in a multi-phase poverty reduction program that culminated in a community strategic vision process. Research on this process was guided by alternative definitions of poverty and place attachment literature. Results from the qualitative survey data show many descriptions of poverty outside of traditional economic definitions and illustrations on the significance of place. Implications and recommendations on the use of visioning in other contexts in Extension are discussed.

Introduction

Poverty rates in many rural communities in Montana are well above national averages (Harrison & Watrus, 2004; Proctor & Dalaker, 2003). These rural areas tend to be agricultural and ranching communities that exhibit generally higher unemployment, lower levels of education, and more limited health care options (Smith, 2008) and economic and social pressures from in- and out-migration and an aging population (Johnson, 2004; Von Reichert, 2002). In an effort to address poverty, 21 agricultural and ranching communities in rural Montana participated in a multi-phase poverty reduction program administered by Montana State University Extension. The program occurred between August 2006 and June 2008 and involved three distinct phases:

1. Study Circles© (where citizens discuss and define poverty and assets within their community),
2. LeadershipPlenty© (a leadership skill-building program), and
3. Community strategic visioning (the culmination of the program linking knowledge to action).

Community strategic visioning (CSV), also referred to as "community visioning" or simply "visioning," is a citizen-based planning process in which diverse sectors of a community use collaboration and consensus-building techniques to collectively define an issue, identify community assets, and determine a desired future through a coordinated plan of action. The use of CSV is increasingly cited as an efficient and effective means of identifying core community values; prioritizing goals and strategies; and implementing community plans, policies, and decisions (Aigner, Flora, Tirmizi, & Wilcox, 1999; Bodeen & Hilliker, 1999; Bloom, 2000; Christenson & Robinson, 1989; Flora & Flora, 2008; Green & Haines, 2007; Kretzmann & McKnight, 1997; McKinlay, Plein, Green, & Williams, 1998; Peterson, 1995; Potapchuk, 1996; Walzer, 1996).

Ultimately, CSV necessitates identifying and empowering diverse stakeholders within a community who are actively engaged throughout a community planning effort (Flora & Flora, 2008). Crafting the vision is as much about process as outcome and encouraging purposeful reflection on coordinated strategy, action, and future-oriented thinking. With regard to poverty, a visioning process can bring together many disparate factions within a community to help identify key causes, understand shared values and assets, and create and implement a tangible plan of action.

This article presents survey data from six communities in rural Montana. The goal of the article is to provide respondents' views of the various definitions of poverty in each community, present descriptions of the importance of place and place attachment, and offer a location-specific community vision to address poverty. Ultimately, the article assesses the effectiveness of a CSV program in Montana, determines tangible program outcomes, and recommends evaluative criteria for future program design and implementation. Gaining a better understanding of how CSV is applied in poverty alleviation in this rural Montana context can contribute to improved program delivery in other Extension programming areas that necessitate broad-based community deliberation, reflection, and action.

Conceptual Framework

CSV is increasingly used as a community development technique in a variety of settings. For example, visioning has been applied as a way to confront urban decay (Murtagh, 2001), to address economic change (Brown-Grayham & Austin, 2004; Weinberg, 1999), as a way of identifying leaders (Sandmann & Kroshus, 1991), as a method of increasing legislative support (Fetsch & Bolen, 1989), to manage tensions associated with multiculturalism (Uyesugi & Shipley, 2005), in corporate decision-making (Helling, 1998), in a range of international settings (Cuthill, 2004; Murtagh, 2001), and, more generally, as a way to build trust and enhance relationships in communities (Flora & Flora, 2008; Green & Haines, 2007; Kretzmann & McKnight, 1997). A visioning process can bring a community together when strategies are lacking, incompatible, or antagonistic or when there is confusion or conflict about goals and strategies. The CSV process has been refined to include a number of tangible steps. These steps and related actions and descriptions are articulated by Ames (2006) and detailed in Table 1.

Table 1.

The Five Steps of Community Strategic Visioning Based on Ames (2006)

Visioning Step	Action	Description
Step 1: Where are we now?	Community Profiling	Find descriptive data; Identify community values
Step 2: Where are we going?	Trends Analysis	Obtain trend data; Determine probable scenarios
Step 3: Where do we want to be?	Vision Statement	Possible / preferred scenarios; Community vision
Step 4: How do we get there?	Action Plan	Goals / Actions / Strategies
Step 5: Are we getting there?	Implement and Monitor	Plan execution; Community indicators / Benchmarks

CSV provides the opportunity for citizens to determine and guide specific action by outlining what could be or should be both in the short- and long-term. CSV emphasizes community assets rather than needs and identifies options and opportunities for the future (Green & Haines, 2007; Kretzmann & McKnight, 1997). To assist in effective visioning in a poverty context, two primary frameworks were used for the creation of the survey instrument and analysis of the data. The first framework involves exploration of alternative definitions of poverty. The second framework involves scholarship outlining a concept referred to as "place attachment" or "sense of place."

Alternative Definitions of Poverty

One of the objectives of the research was to identify how poverty was defined in each community. Poverty is often defined in purely financial terms; however, there are many attributes and characteristics with no connection to economics. While the US Census Bureau uses 48 income thresholds to determine levels of poverty, addressing poverty for many scholars and practitioners begins by defining the term broadly to include financial indicators *and also* those related to social, emotional, mental, and a host of other important characteristics. Payne (2005) defines poverty as "the extent to which an individual does without resources" (p. 7), drawing on the following eight characteristics of poverty outlined in Table 2. This expanded definition of poverty was used in the research design and to guide the data analysis.

Table 2.
Eight Characteristics of Poverty with Examples Based on Payne (2005)

Characteristic of Poverty	Examples
Financial	Money, goods and services
Emotional	Choose and control responses to negative situations
Mental	Mental abilities / acquired skills to deal with daily life
Spiritual	Believing in divine purpose / guidance

Physical	Health / mobility
Support systems	Friends, family, resources available in times of need
Relationship	Role models (nurturing, not engaging in self-destructive behavior)
Knowledge of hidden rules	Knowing unspoken cues / habits of a group

Place Attachment

Research conducted in environmental psychology, cultural geography, and political science indicates that place attachment can shape individual and group identity, which in turn contributes to sociopolitical stability and functionality. In some of the earliest work on this concept, Proshansky (1978) describes it as a "relation to the physical environment by means of a complex pattern of conscious and unconscious ideas, beliefs, preferences, feelings, values, goals and behavioral tendencies and skills relevant to (the) environment" (p. 155). Research such as Brown and Werner's (1985) and Mesch and Manor's (1998) studies of neighborhoods reveal how shared experience and the development of contact and intimacy build an attachment or connection to place. Twigger-Ross and Uzzell's (1996) study of the London docklands found that place contributes to the development of individual and shared sense of self-efficacy and self-esteem. Others (Kemmis, 1990; Austin, 2004) suggest that place attachment can contribute to the ability of social groups to positively respond to social, political, and economic challenges.

While the literature base describing correlations between poverty and place attachment is limited, there is emergent scholarship relating place attachment to greater willingness to engage in collective action or more responsible community behavior that maintains or enhances valued attributes of the setting (Davenport & Anderson, 2005; Payton, Fulton, & Anderson, 2005; Vaske & Kobrin, 2001). This concept is articulated by Stedman (2002), who finds, "we are willing to fight for places that are more central to our identities and that we perceive as being in less-than-optimal condition" (p. 577). This view aggregates poverty and place attachment because if attributes of a location are valued and resources are seen as lacking, then citizens would be more likely to take action to address perceived deficiencies. Consequently, the eight characteristics of poverty and the definitions of place attachment were used as a framework to guide the creation of the survey instrument and the analysis of data.

Purpose and Methods

The research attempted to obtain baseline data on respondents' perceptions of poverty in each community as outlined by Payne (2005) and better understand the relationship of poverty to place and place attachment, based on Proshansky's (1978) definition. The study described here was exploratory and descriptive in nature, using a qualitative methodology. The primary objective of the study was to use open-ended responses to generate a rich data set of detailed descriptions and personal narratives in order to better understand the particular characteristics of poverty and place using respondents' own words and phrases. Consequently, the intent was not to make inferences from the sample to the general population but rather to better understand in great detail the perceptions of place and characteristics of poverty *in each community* in order to help guide each visioning process.

Survey Design

The survey instrument was developed by a panel of faculty and staff members in Montana State University (MSU) who had been involved with the program since its inception. The panel met to design and verify each survey item for content validity. Each community also formed a steering committee that reviewed and revised the survey instrument based on issues or actions that had been raised in previous phases of the program in their community. A pilot study was conducted in one community with a focus group to test face validity and establish reliability. As a result of this process, the order and wording for several survey items were changed to obtain a more valid and reliable survey instrument.

Respondents were instructed to consider the role of poverty in the community when responding to all of the open-ended survey items but were not provided with a definition of poverty or any reference to place attachment. The survey consisted of a total of 18 items made up primarily of open-ended questions to allow for elaboration on key poverty and place topics (for example, "What one project or activity do you think this community should undertake to reduce poverty?" and "Describe three things you think are the most important strengths of this community"). Respondents were encouraged to write as much as they felt was necessary to address each open-ended question.

The survey instrument also contained several questions using a rank order (for example: "Our previous Study Circles activity identified issue areas that deserve attention in this community. Please rank the top 3 issues."), and dichotomous choice items (for example, "Did you participate previously in the program?"). While there were closed items in the survey, the emphasis was on obtaining insights on the characteristics of poverty and place through the open-ended responses.

Data Collection

All 21 communities participating in the program were presented with the option of participating in the CSV survey. The steering committees of six communities volunteered to distribute the survey and participate in the CSV research in the winter of 2007-08. Researchers at MSU worked closely with the steering committee in each community to direct the distribution of the survey. The steering committee in each community was instructed on the importance of obtaining a representative sample. The committees were directed to purposefully target individuals who had *not* participated in previous phases of the project. The objective was to obtain a representative sample of both those who had participated in previous conversations on poverty and place and those who had not.

Consequently, the goal was not to find statistically generalizable data but rather to capture a range of experiences or belief systems in rich detail with greater attention to specificity in the depth of understanding (Patterson & Williams, 2001). In each community, the sample included a large proportion of respondents who had not engaged in the previous discussions on poverty or place. The research objective was not to compare the two populations but rather to obtain a data set that would be exploratory and descriptive reflecting broad themes related to the conceptual framework. Table 3 shows the total sample size for each community and representation of survey respondents who had *not* participated previously.

Table 3.

Community, Sample Size, and Percent of Survey Respondents Who Had Not Participated in the Previous Phases of the Program

Community		Respondents Who Had <i>Not</i> Participated Previously (%)
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	Sample (n)	
Anaconda	424	76.7
Culbertson	113	73.1
Forsyth	252	78
Scobey	105	88
Terry	75	63.9
Wibaux	86	74.7

Steering committee members were provided with several purposive sampling options depending on the method they felt would work best in their community. Options for sampling included survey distribution at targeted community events for generating in-person responses and/or an on-line survey option using the Survey Monkey® Web site. Dillman (2000) has found evidence that offering a mixed-method research approach to survey participants increases response rates and may "provide an opportunity to compensate for the weaknesses of each method... Evidence also exists that people have mode preferences, some preferring face-to-face, other preferring telephone, and still others exhibiting a strong preference for self-administered formats" (p. 218). The same survey was used for the in-person and on-line option because a unimode construction of questions offered to respondents is a way that "assures receipt by respondents of a common mental stimulus, regardless of survey mode" (Dillman 2000, p. 232). The survey was provided at the beginning of the visioning process to assist in addressing Steps 3 and 4 of the visioning process (Table 1).

Data Analysis

Analysis of data involved creation of a narrative coding scheme. The narrative coding identifies segments of the text, phrases, or sentences with unique descriptions related to Payne's (2005) characterizations of poverty and Proshansky's (1978) conceptualizations of place. The text, phrases, or sentences were assigned codes that represented the meaning or significance of the words. A review of the data allowed principal codes to emerge based on specific perspectives, descriptions, and meanings emphasized by respondents. For example, multiple respondents referred to the importance of "schools," "teachers," "after-school programs," or the like. All of these words or phrases would be assigned the common narrative code of "education system" for the final analysis.

Multiple, iterative stages of coding led to a final coding scheme used as a framework to summarize and represent the data for each community. This coding scheme represents principal topics, ideas, and perspectives emerging from the survey data that were shared among many or all of the participants. A thorough analysis of the data was determined when no new codes were discovered. The final coding scheme presents broad parameters of response topics but does not signify complete conformity among all participants. The data set does, however, provide a rich and descriptive guide for the community's discussion throughout the steps of the visioning process. Participants of the visioning steps that followed the research were able to view full copies of the data and executive summaries of the data analysis. This allowed for continued discussion on the legitimacy and validity of the principal codes chosen.

Results and Discussion

The results show unique characterizations of poverty and place in each community. In each of the following tables, the principal codes are presented from the data analysis. The order of these codes is not meant to represent relative strength of codes for the communities. Several survey items elicited responses on the strengths of the community to better understand place attachment. One survey item presented the open-ended question "Describe three things you think are the most important strengths of this community." Table 4 presents the principal codes for each community to this item in the survey.

Table 4.

Principal Codes Identified from the Survey Item: "Describe Three Things You Think Are the Most Important Strengths of this Community."

Community	Principal Codes
Anaconda	People help each other; Safe place; Education system
Culbertson	People help each other; Youth programs; Clean environment
Forsyth	Friendly people; Education system; Access to the Yellowstone River
Scobey	Friendly people; Education system; Safe place
Terry	Education system; Friendly people; Our hospital
Wibaux	Education system; Town unity and pride; Location / proximity to Interstate 94

Several survey items asked respondents to identify issues that should be addressed relating to poverty. Table 5 presents the principal codes for each community to the following question: "What three things in this community would you change?"

Table 5.

Principal Codes Identified from the Survey Item: "What Three Things in This Community Would You Change?"

Community	Principal Codes
Anaconda	Access to healthcare; Community aesthetics (dilapidated buildings); Increase youth opportunities
Culbertson	Economic opportunities; Access to Healthcare; Affordable housing
Forsyth	Municipal infrastructure repair (roads and sidewalks); Economic opportunities; Increase youth opportunities
Scobey	Business development; Increase youth opportunities; More services for elderly

Terry	Economic opportunities; Municipal infrastructure repair (roads and sidewalks); Increase youth opportunities
Wibaux	Address declining population; Access to healthcare; Repair dilapidated buildings

Another survey item asked respondents to rank from a long list the top three activities that deserve attention in each community. The choices were unique to each community because the activities had been decided through public forums that had taken place during the previous phases of the program. These items were presented as possible actions or outcomes to be pursued by the community at a subsequent public CSV event. Table 6 provides the unique responses to each community list of potential activities.

Table 6.
Responses to Ranking of the Top 3 Activities That Deserve Attention in Each Community

Community	Ranking
Anaconda	1) Investigate healthcare issues; 2) Address chemical dependency issues; 3) Clean-up campaign
Culbertson	1) Establish a Housing Board; 2) Community recreation center; 3) Provide financial education classes to youth
Forsyth	1) Better promote recreational activities; 2) Create forums for community communication (Web blogs, special events); 3) Plan community beautification project
Scobey	1) Community enhancement program (cultural events, signage); 2) Affordable housing; 3) Investigate economic development options of wind
Terry	1) Investigate value-added agriculture options; 2) Explore option for assisted-living facility; 3) Revive drive-in theater
Wibaux	1) Community beautification; 2) Expand youth activities; 3) Park and recreation improvements

Communities also included previous vision statements that had been written in past, unrelated community planning efforts. Respondents were asked to comment on the previous vision statement and suggest changes. For example, in the community of Anaconda, the question was posed, "How would you change/improve our current community vision statement written in 1995:"

The historic community of Anaconda-Deer Lodge County, nestled against the majesty of the Pintler Wilderness in the heart of Southwest Montana, will preserve our heritage and resources while planning for growth and development for the betterment of all. Our community, where Main Street meets the mountains, will be a safe, healthy and vibrant place, where people can work, play and learn with a continuing commitment to basic values and mutual respect.

There were 337 open-ended responses to the survey item. Several codes emerged from the analysis of the responses to this vision statement. These principal codes and examples of the responses are presented in Table 7.

Table 7.
Principal Codes and Examples of the Responses to Anaconda Vision Statement from 1995

Principal Code	Example of Response
Youth	I hope that this community can become better for other kids, meaning less casinos and less bars, more stuff for kids to do rather than having them hanging out with the wrong crowd just to find something to do.
Economics	Development is our key word. We have land and we have to use this land for cattle, trees and the like. Whatever we have, it will come from off the land!
Modernization	Don't rely on a turn-of-the-century image. Unfortunately, most of the "older" buildings are either gone or in a state of disrepair.
Elderly	I really feel that we need to look at more senior housing at an affordable rate, because Anaconda is a community of seniors.
Education system	We don't have a sound commitment to education--teachers are poorly paid and ridiculed. Students are not encouraged by their parents to do well nor are they involved in the educational process.
Culture	Broaden this statement to show respect for all people of all cultures.
Environment	I would more specifically explain "resources." It would include the natural beauty of the region, and the importance of managing adjacent wilderness to promote ecotourism, summer and winter.
General critiques / comments	This isn't really a vision statement and it's too generic. It's more of a mission statement. A vision statement lays out what the community WILL be or become.

The comments gathered from this vision statement and the previous survey items were presented at a subsequent public visioning event whereby community members assembled and reflected on the survey data, discussed the location-specific attributes of the community, and reached consensus on a series of specific actions to address poverty. While the specific actions would be too numerous and detailed to present in this article, it is important to note that community action was the direct result of the community survey work and visioning events. Because the primary objective of the CSV is to move from talk to action the survey data served as the community conduit to better understand the various definitions of poverty, the importance and implications of place and place attachment within the community, and ultimately to guide the process of moving forward with specific actions toward the collective community vision.

Implications and Recommendations

The findings of the research presented here illustrate that many community members define poverty beyond traditional economic descriptions, including issues of health care, chemical dependency, community aesthetics, communication, and youth opportunities. Place attachment was also shown to be significant to respondents when questioned about poverty and the changes necessary to address the issue as illustrated by the frequent citing of community pride, hospitality, safety, and geographic attributes. Perhaps most significantly, place attachment qualities were prominent in community vision statements and with regard to the necessary changes and required steps to address poverty. These findings illustrate that community members do define poverty broadly as presented in the framework and do cite strong place attachment sentiments when describing the strengths of the community and items that should be changed or that deserve attention to address poverty.

There are two primary implications regarding this research related to the frameworks on poverty and place:

1. The principal codes reveal a broad view of poverty outside traditional economic definitions. For example, the codes showed multiple examples of the importance of relationships (friendly people), support systems (people help each other), and role models (youth opportunities).
2. The importance of place was consistently offered by respondents as demonstrated by descriptive comments on the physical characteristic of the landscape (aesthetics), community (infrastructure repair), and people (safe place).

While this CSV process was focused on addressing poverty, the process can be oriented to strategic planning on other community issues. Recommended use of the CSV process could include addressing issues of crime, immigration, youth development, nutrition, or value-added agriculture. The process can also have complementary results and assist with the following:

1. Promote reflection and communication of positive views of community where participants focus on assets and ways to enhance existing resources;
2. Build capacity in terms of inculcating group process and engaging on cooperative learning;
3. Allow an entire community to be involved in the definition of a problem and methods of resolution;
4. Increase the potential for insightful discussion on and awareness of a complex topic such as poverty;
5. Encourage deliberation on unique qualities of the community related to assets, values, and actions;
6. Produce outcomes with broad social and political support;
7. Facilitate resolution of future issues or problems.

As these data illustrate, visioning brings community members together to consider their common future and allows exploration of new ideas and possibilities. A visioning process can produce concrete goals and objectives, a shared sense of direction, clear strategies for action, and a framework for future community decisions. Among the principles identified as critical to successful visioning in this context were defining poverty broadly, identifying key relationships, and focusing on the unique qualities of the place.

Based on these findings, discussions with citizens, program administrators, and future community collaborators are currently underway to further refine program delivery, future survey work and evaluative tools and methods. There is agreement that successful implantation of the visioning program required dialogue throughout an inclusive process that was well organized, focused, and adequately supported and managed. Ultimately, using CSV in an Extension-related effort can have beneficial results. The outcome is not necessarily dependent on the particular issue, but rather on the process used and how the visioning steps are managed and applied to guide the process.

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