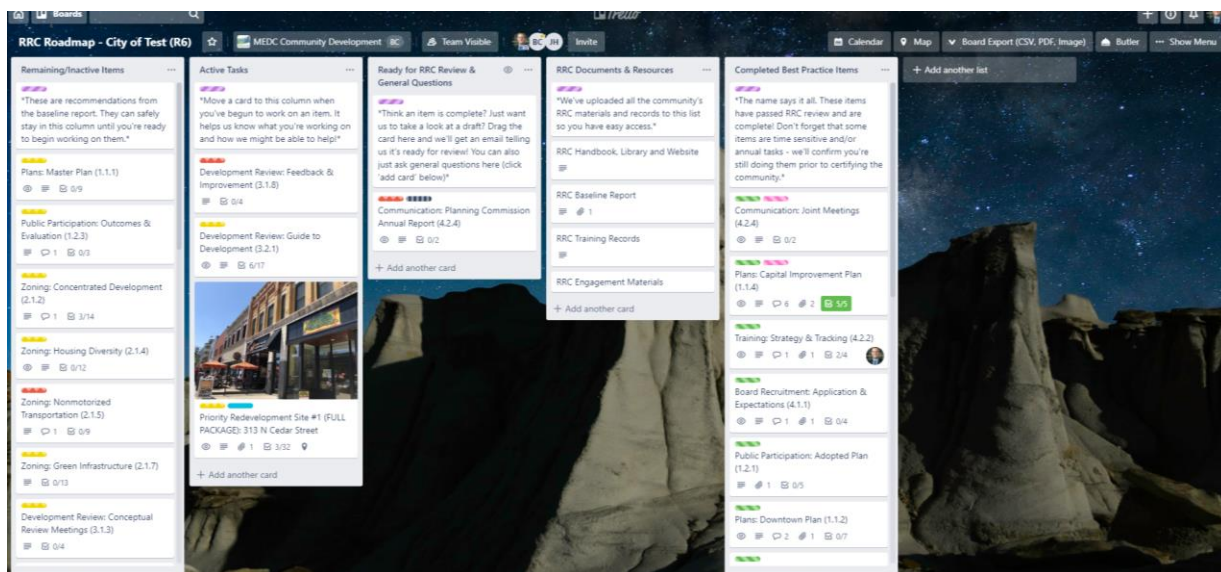


RRC Collaboration System (Trello)

A user guide for using Trello to manage your community's progress in reaching and maintaining RRC certification.



Updated: January 2020

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Introduction

Welcome to the RRC online collaboration system, also known as Trello. The RRC team has invested in this system to foster one of the best benefits of RRC engagement – an opportunity to build stronger relationships with your local, regional, and state partners. It's our hope that this tool will help communities do just that by providing an interactive, visual way to manage the community's efforts to reach and maintain [Redevelopment Ready Communities](#) certification.

This system comes at no cost to the community and a free account allows the community to access everything it'll need for managing its RRC progress. There *are* paid tiers of Trello which can provide more functionality – **those are not necessary for managing the community's RRC board**. Key benefits of the system include:

1. It allows collaboration between the RRC team and any number of the partners the community will be looking to for help in achieving RRC certification;
2. It allows the community to assign tasks, set deadlines, upload attachments and make comments all in one spot;
3. It allows RRC Staff to provide direct and timely feedback;
4. It reduces the number of emails the community will get from RRC Staff, (if you set up notifications) and ensures that key documents don't get lost in someone's email; and
5. It guards against turnover, ensuring the community always has full access to where it's at in the RRC process, including all documentation it has provided to meet the best practices to-date.

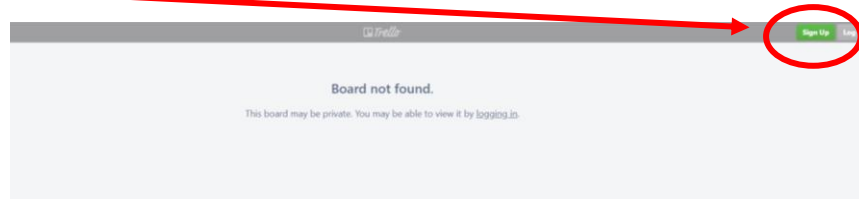
The following pages will help the community get familiar with the system including how to update cards, attach items, and notify us that things are ready for review.

Any questions can be sent directly to your RRC Planner or emailed to rrc@michigan.org.

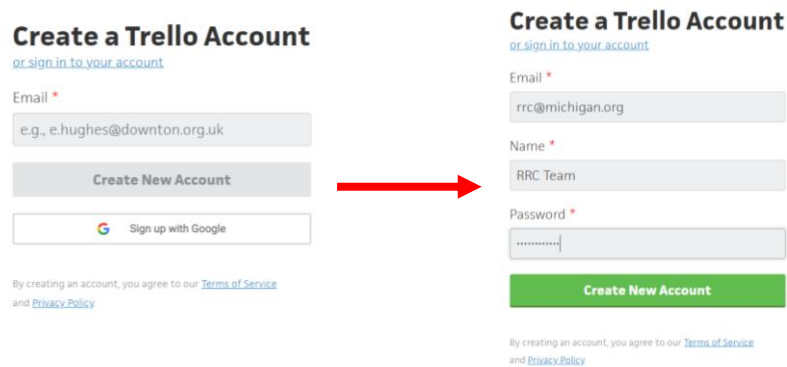
Getting started – Setting up an account

Getting started in the system is easy! Just follow these steps:

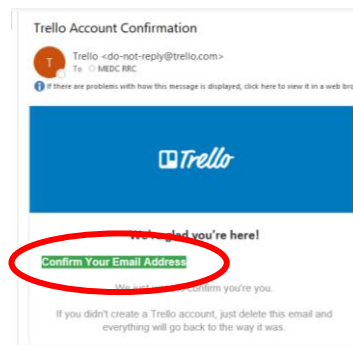
1. **Receive the link to join a board.** This will come either from the RRC planner, someone in the community, or as an invite email directly from Trello with a message. When you first click the link, it may take you to a page that looks like below. Don't worry though – just click the green 'Sign Up' button in the upper right corner:



2. **Create an account:** Trello is an external system not controlled by RRC, but accounts are free. Creating one should take less than five (5) minutes and only requires your name and email plus some basic registration questions. The website will walk new users through the process. It may take you through a brief orientation of how the system works as well.

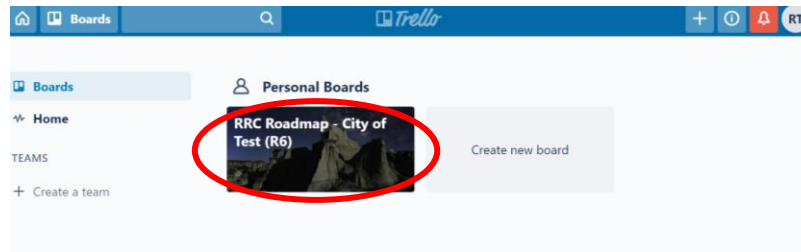


3. **Confirm your email:** Once you've set up the account, Trello will send an email asking you to confirm your email. This is standard online account procedure to reduce spam. You don't need to do this right away but should do so as soon as possible.



Accessing the board

When you click the link to your board it should take you directly there. If it instead takes you to a homepage, the board should appear at the top and you'll just need to click it. For example:



Pro Tip: Make Trello a browser startup/home page

We all get busy and can easily forget about things such as Trello. While there's certainly no need to be in Trello every day for RRC purposes, RRC recommends that communities add Trello as one of your browser homepages so that every time you open the browser fresh, Trello is there. If you don't need it, simply close it out. Every browser is a bit different but see below for links on how to do this on the most commonly used browsers (or just Google "set start up page on [pick your preferred browser]").

- **Chrome:** <https://support.google.com/chrome/answer/95314?hl=en>
- **Microsoft Edge:** <https://support.microsoft.com/en-us/help/4027577/windows-change-your-browser-home-page>
- **Firefox:** <https://support.mozilla.org/en-US/kb/how-to-set-the-home-page>
- **Safari:** <https://support.apple.com/guide/safari/change-your-homepage-ibrw1020/mac>

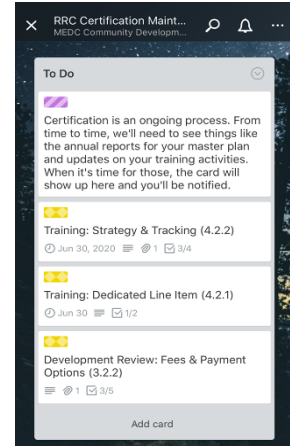
Adding additional members to the board

We've set the system up so we can add multiple members to your board. If you have key staff or external partners who help you with your RRC-related items, you can either add them directly by using the "invite" button at the top or send us their name/email and we can invite them from our end.

Please be aware that users can only be on **one** MEDC Community Development-hosted board at the time as a free account. Most of your partners will fall within this situation, but some – such as regional economic development partners or consultants who serve as the planner for multiple communities – may already be on another community's RRC board. If you try to add someone who is already on another Community Development board, you'll get a notification that you cannot add them. If you think they are an integral partner to have on the board, you may contact for RRC planner and request they be added to your board. Since MEDC will then need to pay for a license for that user, the RRC team will discuss your request and either add them or provide alternate options.

Going mobile using the Trello App (OPTIONAL)

Another benefit to this new system is that it's mobile. This mostly helps the MEDC Community Development team when we are in the field visiting the community as we can now take notes and update things in real time. But you're also welcome to download the app on your phone so you can update RRC items on the go. This can be particularly helpful if you need to take pictures of something like a priority site – those can then be uploaded directly to the card from your phone. This is completely optional but for those who are inclined to tech, it's a nice perk.



Engaged Communities (non-certified)

This section contains everything you'll need to know (and then some) if your community is just starting the RRC process or has been with us a while and working toward certification.

General Board Overview

When you access the board, you'll see five columns (referred to as 'lists' by Trello). If you've received your baseline evaluation or are certified, you'll find that the board is fully customized like the City of Test's board on the next page. If you haven't been evaluated, the board will not have most of the labels and everything will likely be in the first list on the left.

Each board will have the same five lists:

- 1. Remaining/Inactive Items:** Every incomplete best practice criterion in RRC is broken down as a 'card' in this column. If the community has been evaluated, it'll also include labels and other information to help the community understand and complete the card.
- 2. Active Tasks:** These are the items that the community is currently working on. The community can work with its RRC Planner to determine the best items to put in here – or it can just do so on its own. *To remain in good standing with RRC, the community should always be working on at least 2-3 items.*
- 3. Ready for RRC Review & General Questions:** When a community believes a card is completed or it just wants a review before finalizing things, drag it here. RRC will be notified that it's ready for review.
- 4. RRC Documents & Resources:** This is where the community will find all its RRC documents and as well as links to various resources such as the RRC Library.
- 5. Completed Best Practice Items:** When RRC has reviewed something and finds it complete, the RRC Planner will move it into this list. **Nothing should ever be moved into this list by anyone other than the RRC Planner.**

RRC Roadmap - City of Test (R6) Private Team Team Visible RT BC JH Invite Calendar Map Board Export (CSV, PDF, Image) Butler Show Menu

Remaining/Inactive Items

Helpful Hints
These are recommendations from the baseline report. They can safely stay in this column until you're ready to begin working on them.

Partially Aligned
Plans: Master Plan (1.1.1)
0/9

Partially Aligned
Public Participation: Outcomes & Evaluation (1.2.3)
1 0/3

Partially Aligned
Zoning: Concentrated Development (2.1.2)
1 3/14

Partially Aligned
Zoning: Housing Diversity (2.1.4)
0/12

Unaligned
Zoning: Nonmotorized Transportation (2.1.5)
1 0/9

Partially Aligned
Zoning: Green Infrastructure (2.1.7)
+ Add another card

Active Tasks

Helpful Hints
Move a card to this column when you've begun to work on an item. It helps us know what you're working on and how we might be able to help!

+ Add another card

Ready for RRC Review & General Questions

Helpful Hints
Think an item is complete? Just want us to take a look at a draft? Drag the card here and we'll get an email telling us it's ready for review! You can also just ask general questions here (click 'add card' below)

+ Add another card

RRC Documents & Resources

Helpful Hints
We've uploaded all the community's RRC materials and records to this list so you have easy access.

RRC Handbook, Library and Website
1

RRC Baseline Report
1

RRC Training Records

RRC Engagement Materials

+ Add another card

Completed Best Practice Items

Helpful Hints
*The name says it all. These items have passed RRC review and are complete! Don't forget that some items are time sensitive and/or annual tasks - we'll confirm you're still doing them prior to certifying the community.***ONLY RRC PLANNERS SHOULD MOVE THINGS INTO/OUT OF THIS LIST***

Fully Aligned Annual Item
Communication: Joint Meetings (4.2.4)
0/2

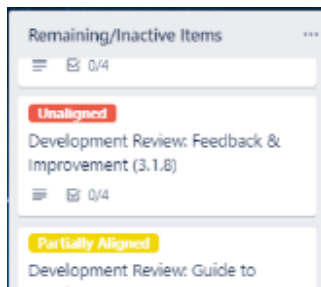
Fully Aligned Annual Item
Plans: Capital Improvement Plan (1.1.4)
6 2 5/5

Fully Aligned
Training: Strategy & Tracking (4.2.2)
1 1 2/4

Fully Aligned
Board Recruitment: Application & Expectations (4.1.1)
1 1 0/4

Fully Aligned
+ Add another card

Understanding Cards (RRC Best Practice Criteria)



Each RRC task or criteria has been converted into a card. Cards live in a list as seen to the left.

Click on any card to learn more about the task. It'll open a bigger view similar to below with key details such as the exact wording of the criteria, what RRC found in the baseline report (if applicable), a clear recommendation on how to complete the item and more.

Title (RRC Best Practice Criteria Number)

Current status (green/yellow/red) plus any other applicable labels.

Exact wording of the **best practice criterion**.

Recommendation for aligning with the criteria; based on the community's RRC Baseline Report.

A snapshot of the **RRC Baseline Report findings** related to this item.

A **checklist of how to complete the card** – based on the recommendation above.

The exact **expectations from the RRC Best Practices handbook** so it's always clear how RRC reviews the item.

Comments and a **record of any activity** related to this card.

General Workflow

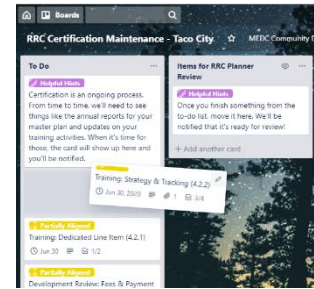
While there are several lists on the board, you'll spend 95% of your time in the first two. When you're ready to begin working on an item from the inactive list, **click and drag** it to the active list. When you've completed the card (see details in the previous section), **drag it** to the review list.

You're free to look at the other two lists, but we ask that you not make changes. Those lists are there to be fully transparent and share information but also serve important administrative and recordkeeping functions.

Workflow example:

The community has decided to create orientation materials (best practice 4.1.2) for its planning commission & DDA, as recommended by RRC.

1. *Move the card for 4.1.2 from inactive to active*
2. *Set a target due date*
3. *Complete the card (instructions inside)*
4. *Move the card to Ready for review; RRC planner gets an email notification*
5. *RRC planner reviews materials, makes comments and moves card back to active. You'll receive an email notification.*
6. *Community makes changes, uploads new documents*
7. *Community moves card back to ready for review.*
8. *RRC reviews materials, finds them in alignment*
9. *RRC moves the card to the completed column.*



Finished with a card? Just click and drag it to the review list.

Selecting cards to work on (i.e. active status)

The RRC Best Practices are comprehensive and working on everything at once likely isn't within the capacity of any community. RRC recommends that the community have 3-5 items in the "active" column at any given time. RRC planners are always available to help you determine which cards to work, but if you'd prefer to make that call on your own, we recommend considering the following:

1. **Find a balance of long-term and short-term items.** For example, you may be working on your master plan update (card 1.1.1). While that may take a lot of your time, there's likely another smaller item such as the planning commission annual report (card 4.2.4) that you could also work on.
2. **Consider who your partners are and what they can work on.** In other words, this doesn't have to be all YOU. Have one card you're working on, one your DDA Director is working on, and maybe another long-term card.
3. **Look at your RRC Baseline Report.** That report includes suggested timeframes which typically correspond to RRC's recommended approach. These recommendations come from years of working with communities of all sizes and capacities.

Completing Cards – Providing Documentation/Comments

When you open a card to complete it – such as the example above with 4.1.2 (orientation packets), you’ll find instructions, checklists, etc. to help guide your efforts to complete the card. In order to maintain the integrity of what it means to have RRC certification, the RRC team seeks to have **clear documentation for every item**. In this case, that means you’ve either attached the a copy of the orientation packets or in some other way have very clearly explained how the community meets the best practice. Simply saying “we’ve created packets” will result in your RRC planner asking for more detail. Having this information is essential for successfully advocating on your behalf when it comes time to request formal certification for your community.

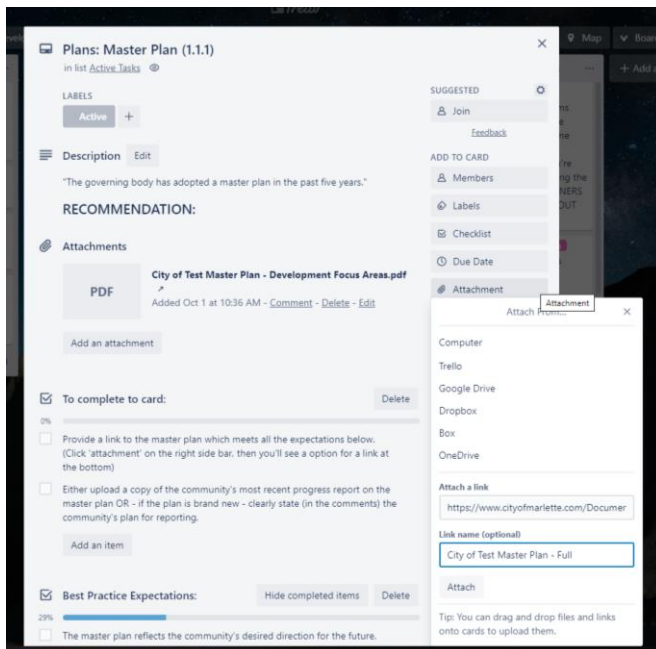
When in doubt, lean toward providing too much information. Backing up attachments with comments to provide context is always advisable.

Attaching Documents

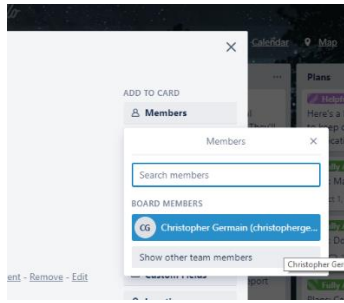
Attaching documents is the most common way you’ll show the community has met a best practice. Attachments can be files (such as Word, Excel, PDF, etc.), links, or even other Trello cards (for example, if your economic development strategy is in your master plan, we can link those cards). You’ll find an attachment button in the middle of the card, on the right, and as an option in the comment section.

To attach an item, click the button, select the file type, name the link (if it’s not super obvious by the file name), and click ‘attach’.

In the example below, Christopher is attaching the master plan for the City of Test by clicking the button on the right, pasting the link from the city’s website, and renaminging it so it’s clear what the file is.



Assigning members to cards (i.e. delegating)



If you have other staff members or partners on the board, it may be helpful to add them as members to the tasks you'd like them to do. For example, by default Test's City Manager is the RRC point of contact. But the DDA Director was also added to the board at their request and is in charge of ensuring the DDA Plan (best practice 1.1.2) stays up to date.

You can assign them to that specific card by opening it, then clicking "Members" in the upper right. They should show up in the drop down. Once you assign them, they'll get notifications for that card. It also helps

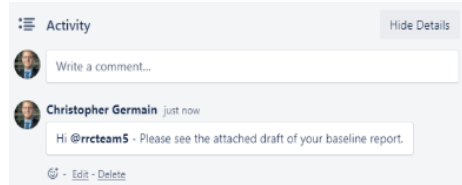
us to know that you've assigned that card to someone else.

Setting target due dates

An optional, but highly recommended, function of cards is to set due dates. You can do this using the Due Date button on the upper right of the card. By setting a target due date, the RRC team can better follow progress. Due dates will also trigger automatic reminders a couple of days beforehand as an extra nudge to get the task done. If you miss a date, don't worry. You can always change it.

Mentions/Tagging Others (@)

One of the most powerful communication tools built into Trello is the ability to mention/tag someone in a comment. This triggers a notification to let that person know they should check your comment. In the example to the right, RRC Planner Christopher Germain has tagged the RRC Team to let them know that their the baseline for the City of Test is available for review. The RRC team will then get an email so they know to go check the board. If they're turned off email notifications, they'll still see the notification the next time they log in to Trello.



In order to mention someone, simple type '@' followed by their name. The system will auto populate suggestions if there's someone on the board who matches those letters. The person you're looking to tag must be a member of the board for this function to work (see later section on adding members).

As a general rule, always tag your planner in a comment if you're looking for feedback from them. It'll build in a safety net to ensure notifications get through.

Watching Cards, Notifications, & Reminders

The easiest way to stay on top of activity in the board is to ‘watch’ a card. To do that, just open the card and click the ‘Watch’ button on lower right side of the card. Whenever the card is moved to another list or someone else adds comments/attachments, you’ll be notified via email.

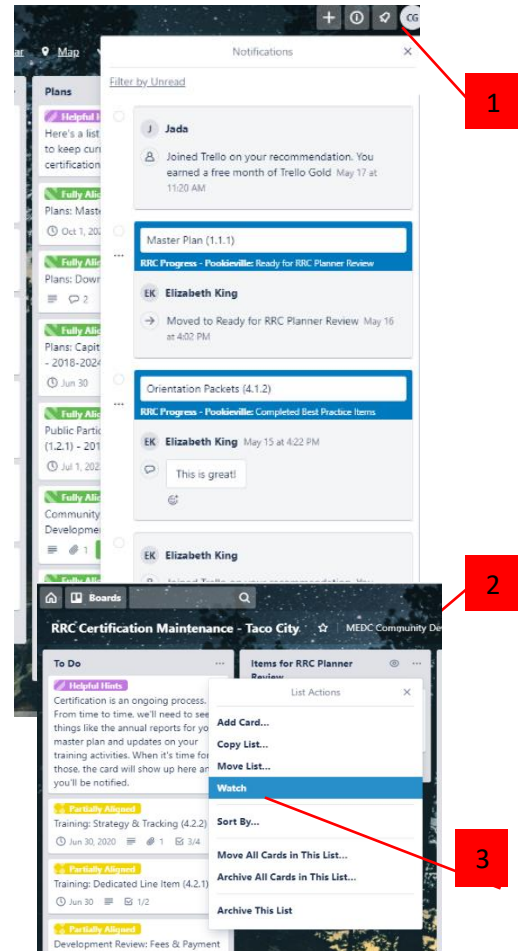
To control the *frequency* of email notifications, click the notification button (🔔) in the upper right corner of the board(1), then click “change notification frequency”(2). It’ll let you choose between instantly or hourly. You can also turn them off completely but if you do that, we encourage you to get in the habit of checking the board at least weekly.

To unfollow the card, simply click the ‘Watch’ button again.

You can also follow lists by clicking the three dots in the upper right corner(3). That will give you notifications any time something is added or edited in the list. We’d encourage you to watch the Active and Completed lists to the very least so you can see if someone moved something into those lists.

You’ll know you’re watching a card or list when the eye symbol (👁️) appears (👁️) at the top.

Finally, be aware that all cards with due dates will by default send out a reminder two (2) days before the date to anyone assigned to the card.



Annual Items

RRC is an ongoing way of doing business in your community. As such, you’ll notice there are some items that call for annual reviews or updates. Examples include the capital improvements plan, planning commission annual report, and joint meetings. These are typically denoted with a pink “Annual Item” label. Once you complete those items for the first time, the RRC planner will work with you to set a target due for the annual update. The system is programmed to automatically move the annual items from the completed list to your Active list one more prior to the due date. This function helps ensure that those items remain current so there are no surprises when it’s time to request certification.

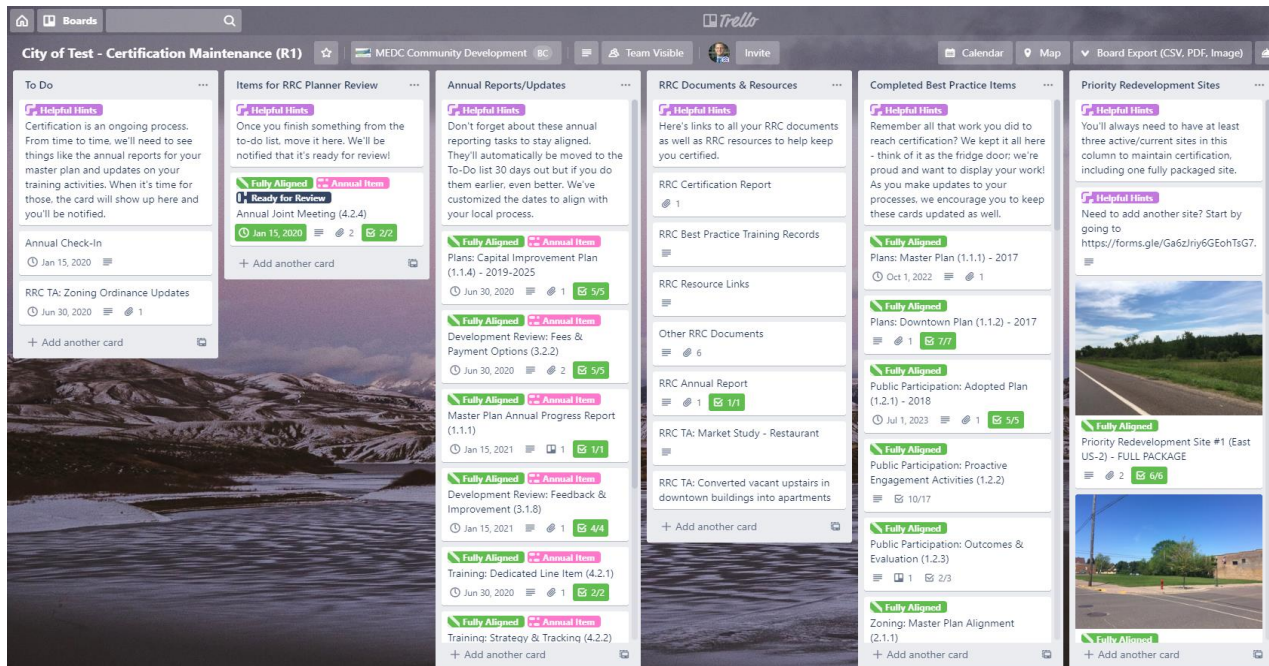
Certified Communities

This section contains information if your community has achieved RRC certification and you're using Trello to maintain that status.

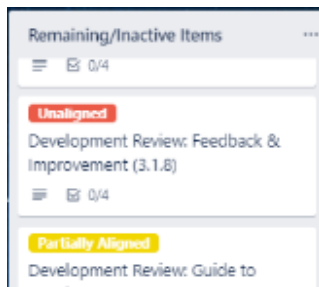
Board Overview

Every RRC certified community took a different path to reach certification. As such, RRC has chosen to allow full customization of certification boards to reflect those differences. The graphic below provides an idea of what yours *may* look like. In general, all boards will include the following columns, albeit with slightly different organizations or names. Yours may include additional columns depending on your situation.

1. **To-Do:** This is a list of things which are due soon (typically within the next 30 days). Your RRC planner may also put other things in this list such as active technical assistance projects.
2. **Annual Items:** This is a list of those annual updates such as the planning commission annual report, capital improvements plan, etc. They live here when they aren't due for updates.
3. **Items for RRC Planner Review:** This is where you place the cards from the To-Do list once you've completed the task. Your RRC planner will get a notification that there's something waiting for our review.
4. **RRC Documents and Resources:** This is a space for all your official RRC documents such as the certification report, MOU, resolutions, completed TA projects, etc.
5. **Completed Best Practice Items:** This is a holding place all for those non-annual best practice items. So you can see all the work done previously. Typically you won't need to use this list but it's here in the interest of transparency.



Understanding Cards (RRC Best Practice Criteria)



Each RRC task or criteria has been converted into a card. Cards live in a list as seen to the left. As a certified community, most of your cards will be in the completed column or the annual reports/updates list.

Click on any card to learn more about the item. It'll open a bigger view similar to below with key details such as the exact wording of the criteria, how the community met the best practice to achieve certification, and any supporting documentation/records.

Title (RRC Best Practice Criteria Number)

Current status (likely green plus any other applicable labels such as 'annual item').

Exact wording of the **best practice criterion**.

Needed action (if any) for aligning with the criteria. Typically only applicable for annual items.

A snapshot of RRC team's finding to support the community's certification of this item.

A **checklist of how to complete the card** – most of these will already be checked since you're certified.

The exact **expectations from the RRC Best Practices handbook** so it's always clear how RRC reviewed the item.

Comments and a **record of any activity** related to this card.

General Workflow (keeping items current)

A main goal of implementing Trello for certified communities is to help you stay current with the RRC Best Practices without burdensome annual RRC reports that sit in everyone's inbox until we can all find time to do them. As such, the most common way you'll use this board is to provide updates to annual items as they come due. You'll work with your RRC planner to set appropriate due dates way in advance so none of this is a surprise. The overall workflow for keeping things up-to-date looks as follows:

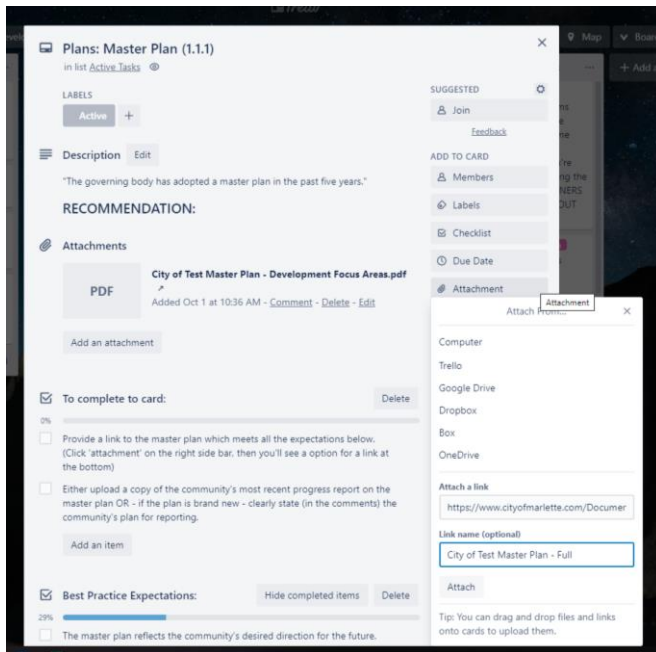
1. 30 days prior to a card's due date, the system will automatically move it to the To-Do list
2. Community will get a notification (as long as you're 'watching' the list (see later section) for details.
3. Community completes the action on the card (uploads annual report, training records, etc.)
4. Community moves card to the "Review" column
5. RRC Planner reviews the card, makes any comments, moves back to annual item list and sets a due date for a year out.

Attaching Documents

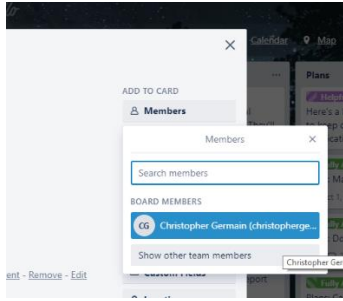
Attaching documents is the most common way you'll interact with a card. Attachments can be files (such as Word, Excel, PDF, etc.), links, or even other Trello cards (for example, if your economic development strategy is in your master plan, we can link those cards). You'll find an attachment button in the middle of the card, on the right, and as an option in the comment section.

To attach an item, click the button, select the file type, name the link (if it's not super obvious by the file name), and click 'attach'.

In the example below, Christopher is attaching the master plan for the City of Test by clicking the button on the right, pasting the link from the city's website, and renaming it so it's clear what the file is.



Assigning members to cards (i.e. delegating)

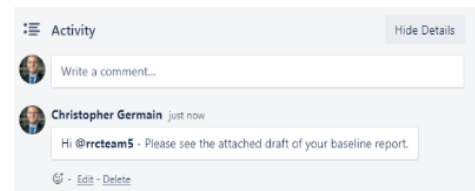


If you have other staff members or partners on the board, it may be helpful to add them as members to the tasks you'd like them to do. For example, by default Test's City Manager is the RRC point of contact. But the Planning Commission Chair has expressed an interest in completing the planning commission annual report (we like to dream big!). The City Manager can add the Chair to the board and then assign the card to them so they can upload the document when it's complete.

You can assign a card to someone by opening it, then clicking "Members" in the upper right. They should show up in the drop down. Once you assign them, they'll get notifications for that card. It also helps us to know that you've assigned that card to someone else.

Mentions/Tagging Others (@)

One of the most powerful communication tools built into Trello is the ability to mention/tag someone in a comment. This triggers a notification to let that person know they should check your comment. In the example to the right, RRC Planner Christopher Germain has tagged the RRC Team to let them know that their the baseline for the City of Test is available for review. The RRC team will then get an email so they know to go check the board. If they're turned off email notifications, they'll still see the notification the next time they log in to Trello.



In order to mention someone, simple type '@' followed by their name. The system will auto populate suggestions if there's someone on the board who matches those letters. The person you're looking to tag must be a member of the board for this function to work (see later section on adding members).

As a general rule, always tag your planner in a comment if you're looking for feedback from them. It'll build in a safety net to ensure notifications get through.

Watching Cards, Notifications, & Reminders

The easiest way to stay on top of activity in the board is to ‘watch’ a card. To do that, just open the card and click the ‘Watch’ button on lower right side of the card. Whenever the card is moved to another list or someone else adds comments/attachments, you’ll be notified via email.

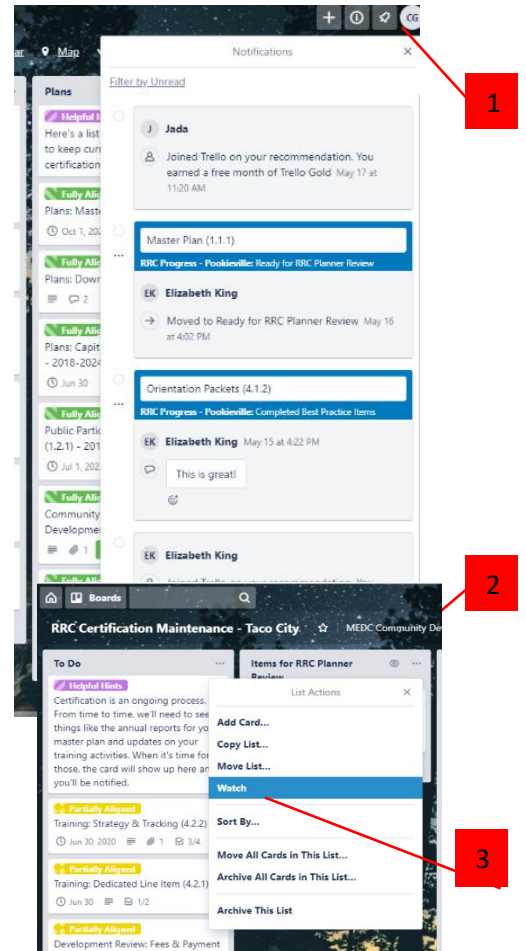
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To unfollow the card, simply click the ‘Watch’ button again.

You can also follow lists by clicking the three dots in the upper right corner(3). That will give you notifications any time something is added or edited in the list. We’d encourage you to watch the Active and Completed lists to the very least so you can see if someone moved something into those lists.

You’ll know you’re watching a card or list when the eye symbol (👁️) appears (👁️) at the top.

Finally, be aware that all cards with due dates will by default send out a reminder two (2) days before the date to anyone assigned to the card.



Recertification

When it comes time for your community to formally begin the recertification process (typically one-year to six months out from your three-year certification anniversary depending on various factors), your RRC Planner will likely make some changes to the board to reflect changes to the best practices. Additional lists or tasks may be added. Your RRC planner will work closely with you to explain any changes.

Providing Feedback

Have thoughts on the system? Share them with us via email or fill out this form and get it back to us. We're always looking to make changes and update our systems to be as community-focused as possible.

Initial impression. *Things such as ease of understanding the system, whether it felt manageable, things you'd change right off the bat.*

Technical Issues – *Did you face any issues getting set up or operating the system?*

Overall feel – *Does this still feel very report-y (yes, we've made that a word now) or does it feel more collaborative, project-based? Something in between? Basically, how does the system make you feel about managing your RRC progress?*

User Guide – *Was it helpful? Ways you'd change it? Things you'd add or remove? Enough pictures?*

Other Thoughts – *Anything else you'd like to share? Be honest. We can take it.*