

Project Planning

Goals:

- To be able to identify and develop a goal as well and be aware of the resources, success factors, challenges, and tasks involved in reaching that goal.
- To have group members co-created a project plan.
- To continue to practice facilitation and group decision-making skills.
- To learn how to effectively use the project planning mountain as a strategic planning tool.

Needs:

Handouts, project planning mountain overhead and posters, 4 different colored pads of 3” x 3” post-it-notes, notes cards with the ‘Vision” and “Goal” written on the, easel, and masking tape.

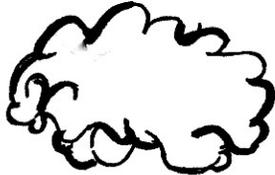
Time	Activity	Materials/Equip
5 minutes	<p>Welcome and Intros</p> <ul style="list-style-type: none"> • Introduce Self • Ask participants to introduce themselves and give an example of one project they will be planning this year. 	
5 minutes	<p>Intro to Topic</p> <p>Have a discussion around what participants have done in the past to successfully plan projects and what have been some mistakes they have made in planning projects.</p> <p>Make sure to discuss:</p> <ul style="list-style-type: none"> • Involving others in the planning; • Assessing the situation before jumping right in; • Developing a “To Do List” before thinking the whole project through; • Making sure one person (you) is not doing most of the work (effective delegation); 	

Time	Activity	Materials/Equip
5 Minutes	<p>Introduce the Project Planning Mountain</p> <ul style="list-style-type: none"> • Show the mountain • Explain that this is one method or format to use when planning an event or project. The format of the mountain is just symbolic of reaching a goal (we all understand the symbolism of reaching a peak.) • The topics or sections covered in this process are important to review when planning any project. • The process we will use is a wonderful process for including many people’s ideas in a short amount of time and making sure that quieter members get an opportunity to share their ideas. This includes all participants’ ideas by having participants write their ideas on a post-it note and post it to the mountain. One idea per post-it-note. 	Project Planning Mountain Poster or Overhead
30 minutes	<p>Mock Plan</p> <ul style="list-style-type: none"> • Explain that we are going to learn this model first by using a practice topic. • Review the Project Planning Agenda (Attached) • Explain the meanings of “Vision” and “Goals” and give participants the vision and goal for this project. Explain that you should come to a project planning meeting with the Vision and Goal already developed. • Explain each component of the mountain and give one or two examples as you go through the project planning process. The attached grid has appropriate examples. <p>Vision Goal Resources Critical Success Factors Potential Obstacles Tasks (Tasks should be placed in chronological order with the first tasks at the bottom of the mountain and the later tasks towards the top.)</p>	<p>Project Planning Agenda</p> <p>Vision Card – “Empowered community leaders and members will ensure that all communities are healthy, safe, and prosperous.”</p> <p>Goal Card – “A successful leadership and community development training for LISC AmeriCorps members.”</p> <p>Post It Notes</p> <p>Project Planning Mountain</p>

Time	Activity	Materials/Equip
5 minutes	<p>Complete Action Plan</p> <ul style="list-style-type: none"> • Demonstrate the use of an action plan to properly distribute and delegate tasks. • Remind participants that this is where the plan can fall apart if the facilitator or project leader takes on all of the responsibility. Success is reliant upon the involvement of others. 	
5 minutes	<p>Debrief and Set-Up</p> <ul style="list-style-type: none"> • Debrief the experience of going through the Project Planning Mountain. • Explain that you would like the participants to practice this method in smaller groups using real examples from their service sites. • Ask for 3-5 volunteers to use a project they need to plan as the topic. 	
30 minutes	<p>Project Planning Practice</p> <ul style="list-style-type: none"> • Break participants into small groups working on a real project. • Help them set up their Vision and Goal. • Have them follow the agenda and practice the method by planning a real project. • Float around the room and assist the small groups. 	<p>Project Planning Mountain posters for the small groups</p> <p>Post-It Notes for the small groups</p>
5 minutes	<p>Close</p> <ul style="list-style-type: none"> • Have each group report out the project they planned and something they learned during the process. 	

Project Planning Mountain

Vision



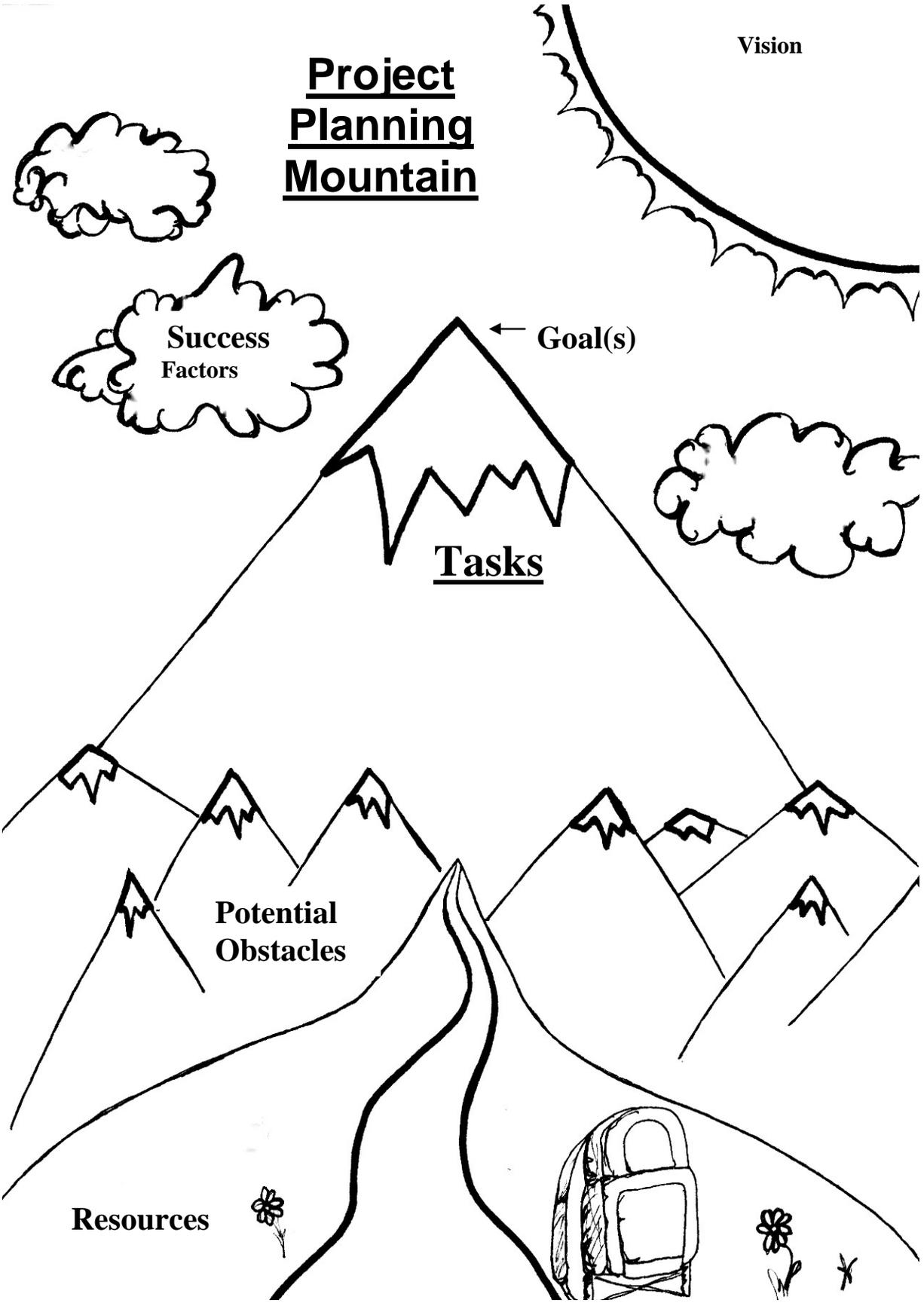
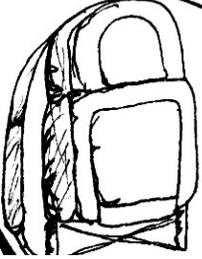
← Goal(s)

Tasks



Potential
Obstacles

Resources



AGENDA

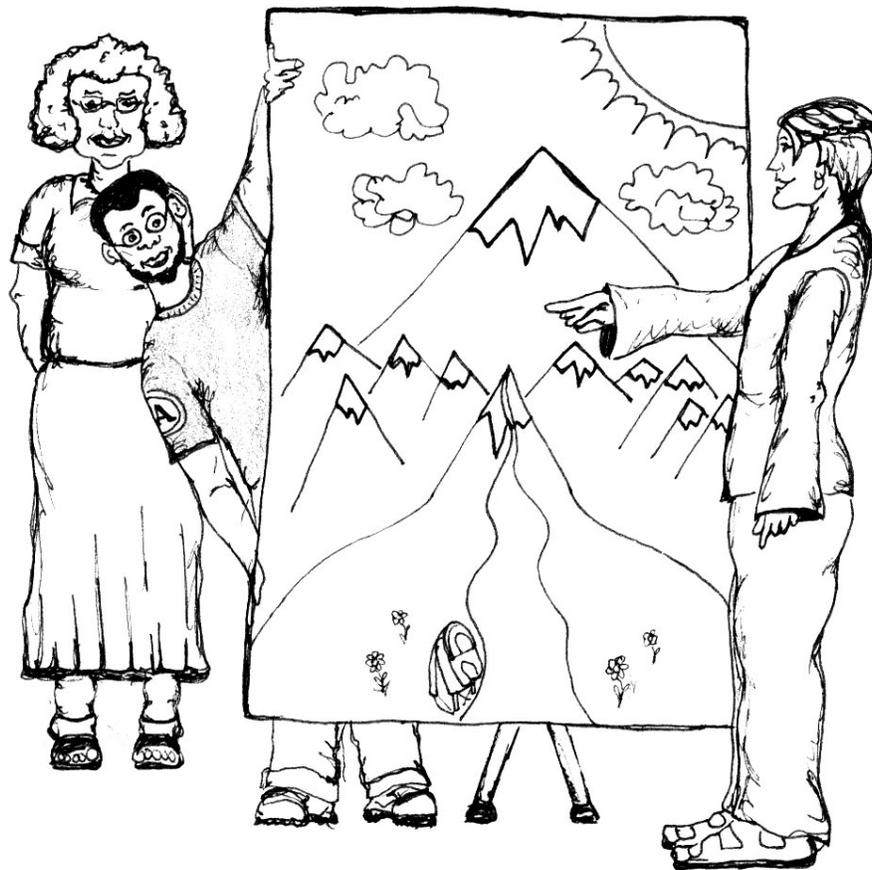
Desired Outcomes:

- To identify the Vision, Goal, resources, success factors, potential obstacles, and tasks for the Project Planning Mountain
- To identify and assign tasks related to the objectives.

ITEM	TO DO	RESPONSABILITY	DESIRED OUTCOME	<u>TIME</u>
Review <ul style="list-style-type: none"> • The Vision • The Goal 	<ul style="list-style-type: none"> • Present and Discuss Vision • Present and Discuss Goal 	Practice Facilitator	To provide Context for the planning session	5 min.
Create a list of potential resources.	<ul style="list-style-type: none"> • Brainstorm • Clarify/combine • Post • 4For Agreement 	Practice Facilitator	To create a list of potential resources	5 min.
Create a list of Critical Success Factors	<ul style="list-style-type: none"> • Brainstorm • Clarify/combine • Post • 4 For Agreement 	Practice Facilitator	To identify the elements that must be present to reach objective	5 min.
Create a list of Potential Obstacles	<ul style="list-style-type: none"> • Brainstorm • Clarify/combine • Post • 4For Agreement 	Practice Facilitator	To identify potential obstacles.	5 min.
Create a list of tasks to complete the plan	<ul style="list-style-type: none"> • Brainstorm • Clarify/Combine • Post in chronological order • 4For Agreement 	Practice Facilitator	To identify tasks related to the objectives.	5 min
Create an action plan so the tasks will be completed	<ul style="list-style-type: none"> • Divide tasks among group members • Record tasks and responsible party 	Practice Facilitator	To delegate tasks	5 min

Component	Definition	Example
Vision	<ul style="list-style-type: none"> • The ideal future state • An image of your wish come true 	“Empowered community leaders and members will ensure that all communities are healthy, safe, and prosperous.”
Goals	<ul style="list-style-type: none"> • Pathways and milestones to achieving the vision • These are measurable milestones that identify endpoints in your project 	“A successful leadership and community development training for LISC AmeriCorps members.”
Resources	<ul style="list-style-type: none"> • All of the resources available to assist with meeting the goals and vision 	“Former AmeriCorps Members” “CDC’s” “Pearl” “The Internet” “Trainers” “Supervisors”
Critical Success Factors	<ul style="list-style-type: none"> • All of the things that must happen for the project to succeed. 	“Members can attend” “Interesting sessions” “Good Food” “An available facility”
Potential Obstacles	<ul style="list-style-type: none"> • Situations that might impede or halt the success of the project • Anticipating obstacles that might be beyond your control 	“Conflicting Schedules” “Budget Cuts” “Lack of Interest” “No facility available”
Tasks	<ul style="list-style-type: none"> • The specific steps that need to be taken in order to reach the goal 	“Develop a budget” “Find a facility” “Find Speakers”

Project Planning and Management Handouts

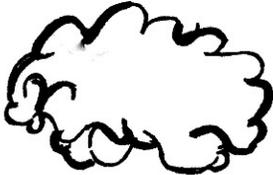


Project Planning Mountain Components

Component	Definition	Example
Vision	<ul style="list-style-type: none"> • The ideal future state • An image of your wish come true 	“Empowered community leaders and members will ensure that all communities are healthy, safe, and prosperous.”
Goals	<ul style="list-style-type: none"> • Pathways and milestones to achieving the vision • These are measurable milestones that identify endpoints in your project 	“A successful leadership and community development training for LISC AmeriCorps members.”
Resources	<ul style="list-style-type: none"> • All of the resources available to assist with meeting the goals and vision 	“Former AmeriCorps Members” “CDC’s” “Pearl” “The Internet” “Trainers” “Supervisors”
Critical Success Factors	<ul style="list-style-type: none"> • All of the things that must happen for the project to succeed. 	“Members can attend” “Interesting sessions” “Good Food” “An available facility”
Potential Obstacles	<ul style="list-style-type: none"> • Situations that might impede or halt the success of the project • Anticipating obstacles that might be beyond your control 	“Conflicting Schedules” “Budget Cuts” “Lack of Interest” “No facility available”
Tasks	<ul style="list-style-type: none"> • The specific steps that need to be taken in order to reach the goal 	“Develop a budget” “Find a facility” “Find Speakers”

Project Planning Mountain

Vision



Success
Factors

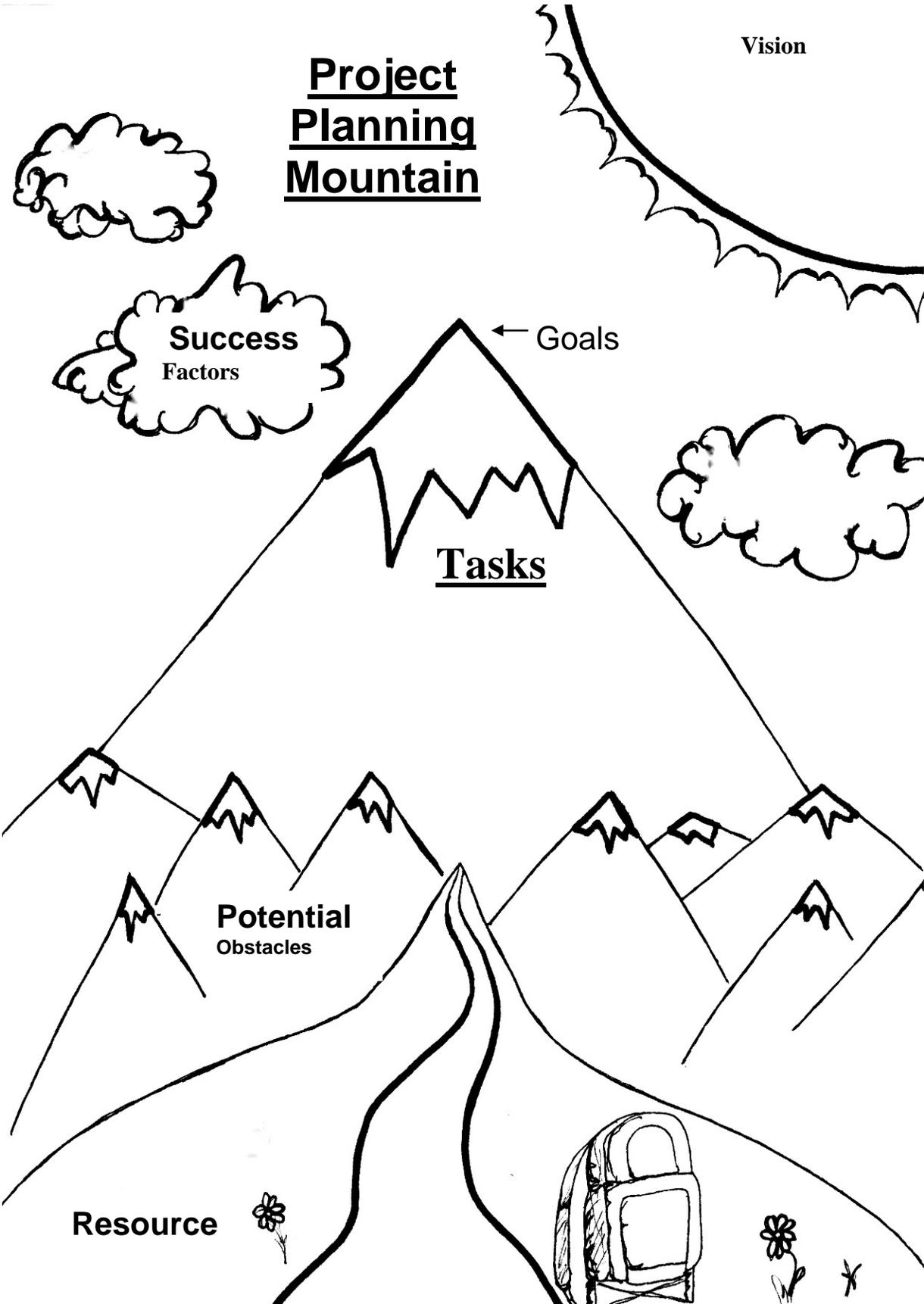
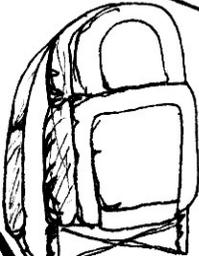
← Goals

Tasks



Potential
Obstacles

Resource



Project Planning Mountain

Vision

- All citizens will look forward to participating in our annual city-wide clean up day.

- \$
- Timeline
- City Permits
- Volunteers
- Commitment
- Follow-Through from committees
- Food for volunteers
- A marketing plan

Success Factors

Goals

- To have 75% participation among residents

THEN

Now

Tasks

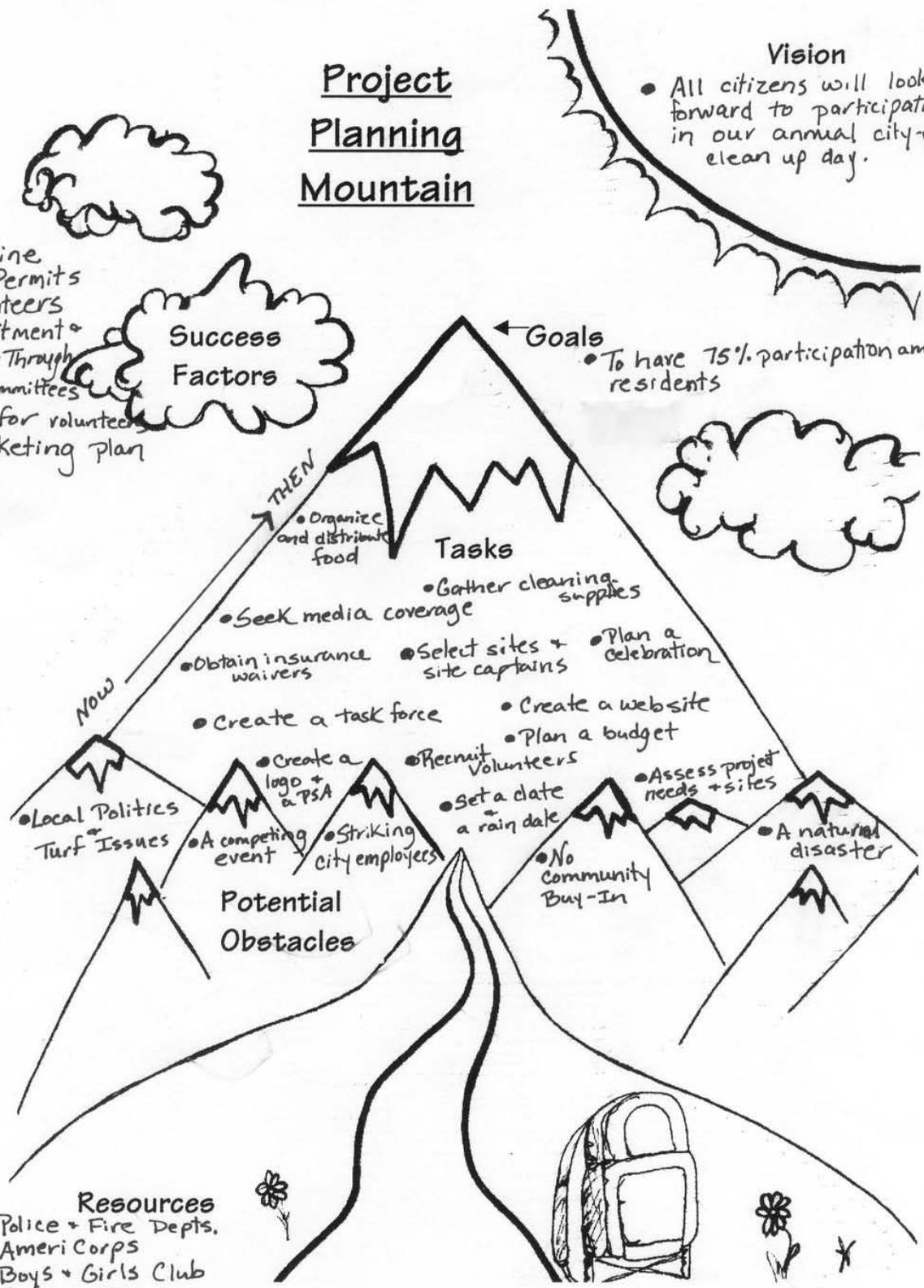
- Organize and distribute food
- Gather cleaning supplies
- Seek media coverage
- Select sites + site captains
- Obtain insurance waivers
- Plan a celebration
- Create a task force
- Create a website
- Plan a budget
- Recruit Volunteers
- Assess project needs + sites
- Set a date + a rain date
- No Community Buy-In

Potential Obstacles

- Local Politics + Turf Issues
- A competing event
- Striking city employees
- Create a logo + a PSA
- A natural disaster

Resources

- Police + Fire Depts.
- Ameri Corps
- Boys + Girls Club
- Safeway
- Local Churches
- Local Schools - teachers + students
- Local Government



Action Plan

Project:		
Tasks	Person Responsible	Date Due