

Project Planning

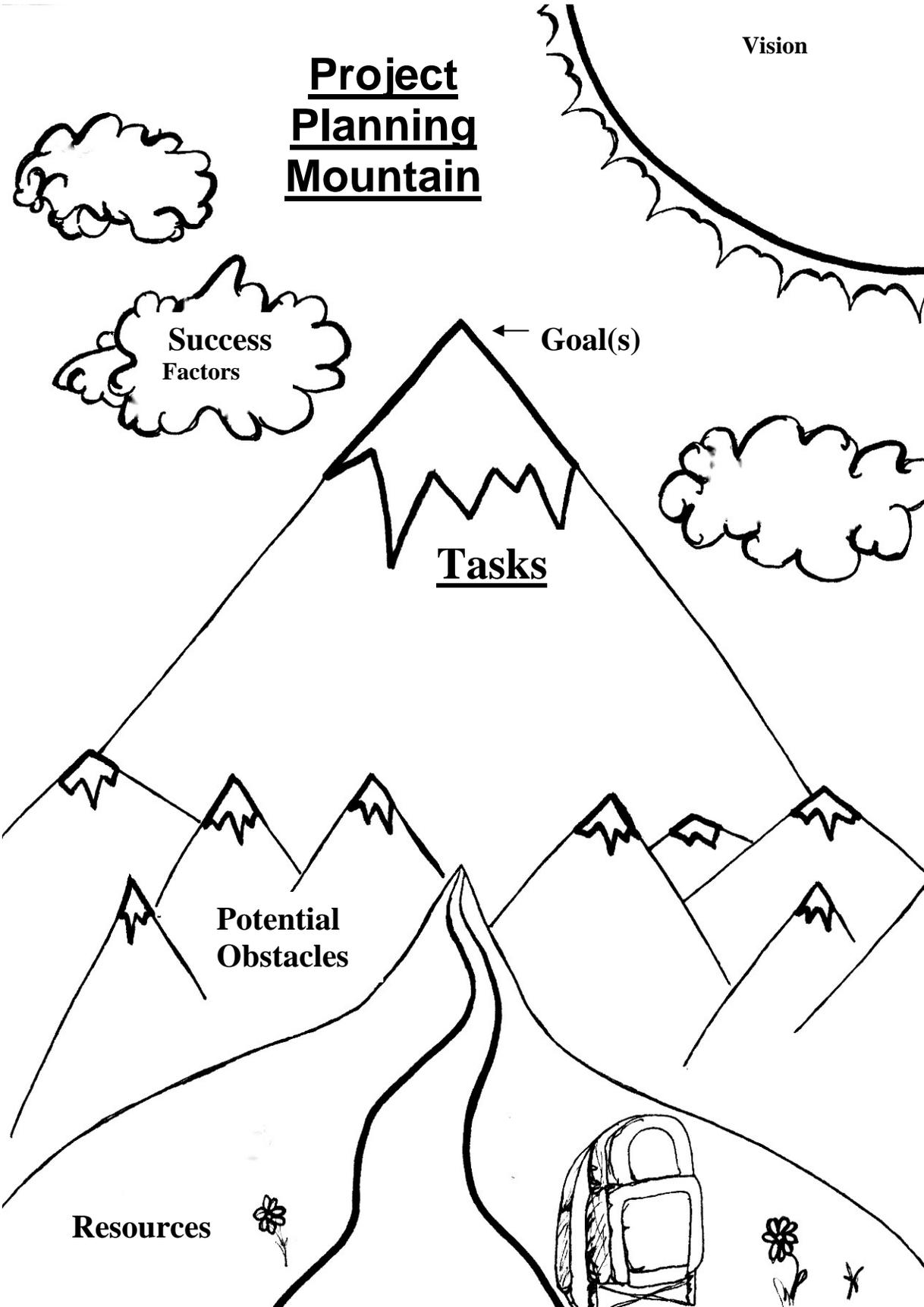
- Goals:**
- To be able to identify and develop a goal, as well as be aware of the resources, success factors, challenges, and tasks involved in reaching that goal
 - To have group members collaborate on creating a project plan
 - To continue to practice facilitation and group decisionmaking skills
 - To learn how to effectively use the project planning mountain as a strategic planning tool

Materials: Handouts, project planning mountain overhead and posters, 4 different colored pads of 3 x 3-inch sticky notes, note cards labeled “Vision” and “Goal,” easel, and masking tape

Time	Activity	Materials/Equip
5 min.	<p>Welcome and Intros</p> <ul style="list-style-type: none"> • Introduce yourself • Ask participants to introduce themselves and give an example of one project they will be planning this year. 	
5 min.	<p>Intro to Topic</p> <p>Have a discussion around what participants have done in the past to successfully plan projects and what mistakes they have made.</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) 	
5 min.	<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. • Stress that the topics or sections covered in this process are important to review when planning any project. • Explain that the process we will use is wonderful for including many people’s ideas in a short amount of time and ensuring that quieter members get an opportunity to share their ideas too. • Ask everyone to write down their ideas (one per sticky note) and post them on the mountain. 	Project Planning Mountain Poster or Overhead

Time	Activity	Materials/Equip
30 min.	<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 at the top.)</p>	<p>Project Planning Agenda Vision Card – Empowered community leaders and members will ensure that all communities are healthy, safe, and prosperous. Goal Card – A successful leadership and community development training for AmeriCorps members. Sticky Notes Project Planning Mountain</p>
5 min.	<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 min.	<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 participants to practice this method in smaller groups using real examples from their service sites. • Ask for 3–5 volunteers to share a project they need to plan as the topic. 	

Time	Activity	Materials/Equip
30 min.	<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>Sticky notes for the small groups</p>
5 min.	<p>Close</p> <ul style="list-style-type: none"> • Ask each group to report out the project they planned and something they learned during the process. 	



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	RESPONSIBILITY	DESIRED OUTCOME	TIME
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 • 4 for 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 • 4 for 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 • 4 for 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 • Measurable milestones that identify endpoints in your project 	A successful leadership and community development training for 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; CDCs; 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 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"> • Specific steps that need to be taken in order to reach the goal 	Develop a budget; find a facility; find speakers