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Project Planning

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Introduction

Before moving forward with any project or change, there is a need to define what we are trying to solve. The process will require six steps:

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Step 1: Manage the planning process

Project management is about developing and managing a “plan to plan.” A good project management plan clearly describes steps and tasks, assigns people to various roles, sets deadlines and milestones, and shows resource allocation.

The planner must manage six project management areas:

- Project Charter and Terms of reference,
- Stakeholder roles and expectations
- Decision-making processes,
- Time,
- Resources for planning, and
- Data-gathering and analysis processes.

Project Charter and Terms of reference

In project management, a project charter, project definition, or project statement is a statement of the scope, objectives, and participants in a project. It provides a preliminary description of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager. It serves as a reference to the authority for the future of the project. The terms of reference are usually part of the project charter.

Stakeholder roles and expectations

In the planning process, key internal and external stakeholders include the project team and community partners. Their participation is critical to achieving the best results. Without it, you can end up with stakeholders questioning, challenging, delaying or overruling decisions.

There are four levels of stakeholders:

- Core - on the planning team,
- Involved - frequently consulted or part of the planning process,
- Supportive – stakeholders that provide some form of assistance,
- Peripheral - need to be kept informed.

Decision-Making Process

Every step of the planning process requires decisions. Be aware of who has to be involved, consulted or informed. Part of planning is managing the flow of information and options so that decisions are timely and supported.

Choose the decision-making process.

- Establish a transparent decision-making process for the core planning group early on. Will the group run on consensus, majority vote, or some other method?
- Outline any other decision-making processes specific to the context. For example, different processes may require subcommittees, particular individuals, under certain circumstances, etc.
- Revisit the decision-making process regularly to ensure it is effective.

Time

It is important to know when overall planning and individual steps should start and end, and how many hours or days to allocate to each planning step. Map this out through a work plan. Define each task, so it is clear how to complete the steps of the planning process – who, what, when and how of each step.

Resources for planning

Before developing a work plan, define and list the type of resources to manage, i.e. space, equipment and personnel.

Data-gathering and analysis process

Making the best possible planning decisions requires good data about the intended audience, the political and social environment, stakeholder opinions, possible programs and other factors.

How much data you gather and analyze is a matter of expectations, and practical considerations meet. Stakeholders may want to incorporate different degrees of rigour and evidence into the planning process.

Practical considerations include the amount of time available, budget, project team expertise, and accessibility to quality data relevant to the program. Make expectations for data-gathering and analysis explicit and realistic.

Good processes for collating, sorting, prioritizing and interpreting the data are also critical. Much of this takes place during the situational assessment.

Step 2: Conduct a situational assessment

Quick and unstructured planning decisions, sometimes in the absence of a thoughtful analysis of available data. A situational assessment is a systematic process to gather, analyze, synthesize and communicate data to inform planning decisions. Information from a situational assessment can be used to inform the goals, objectives, target audiences and activities.

Six strategic steps for conducting a situational assessment:

- Identify key questions,
- Develop a data-gathering plan,
- Gather the data,
- Organize, synthesize and summarise the data,
- Communicate the information,
- Consider how to proceed with planning.

Identify key questions

The first step in a situational assessment is to determine what you need to inform planning decisions. Use the three broad questions to shape the direction of the situational assessment and develop your research questions.

- What is the situation?

- What influences are making the situation better and worse?
- What possible actions can you take to address the situation?

Develop a data-gathering plan

Questions you develop in the first step will determine the data needed. Too much data can become overwhelming; however, you also want a comprehensive plan. Therefore, it is a good idea to develop a data-gathering plan to organize sources of data, tasks, and persons responsible. Ensure your data gathering plan includes diverse types of data; different methods of data collection (e.g. surveys, document review, and literature review); and varied sources of data.

Gather the data

Now that you have identified the research questions and developed a data-gathering plan, the next step is to collect data. It is important to note that there are two types of data collection - primary and secondary data collection.

Primary data is data that you and your situational assessment team collect yourselves; for example, via surveys, key informant interviews or focus groups. When collecting primary data, it is crucial to ensure that people collecting the data have the right skills to do so properly. Use qualified primary data collectors since this increases their confidence and ability to collect data consistently and correctly. Also, ensure that data collection is standardized and done ethically, including documenting informed consent.

Secondary data collection, for example, by the provincial or federal government, a researcher, or a partner organization. A literature search is also an example of secondary data collection.

Organize, synthesize and summarise the data

The amount of data generated during a situational assessment can be overwhelming. One of the easiest ways to organize information is to arrange the data according to your original key questions.

If possible, summarise findings in a paragraph or five to six bullet points. Summarized data will offer others a quick understanding of results and can be useful in any communication products that you develop.

Communicate the information

A lot of time and effort has gone into your situational assessment. Colleagues, partner organizations and decision-makers are all interested in your findings. Therefore, it is essential to communicate key findings to each of your stakeholders in a manner that is understandable to each distinct audience.

Consider which information each of your different stakeholders needs to know, and how you can best convey it to them. One strategy is to develop a communication plan which includes your key audience, communication objectives, channels, and communication products. You can sometimes use the same communication products for different audiences – as long as their communication style, and your communication objectives for each audience are aligned.

Consider how to proceed with planning

It is now time to utilize your findings and decide on your next steps. Consider:

- How do you perceive your ability to affect the situation with the available time, financial resources and mandate?
- What are the gaps in data quality or quantity, relative to stakeholder expectations?
- How might that restrict your ability to make evidence-informed decisions about goals, audiences, objectives, strategies, activities and resources?
- What are your next steps in the planning process? Will you proceed now, or must you revisit research questions, project scope or resources?

Step 3: Set goals and outcome objectives

A goal is a broad statement that provides overall direction for all aspects of a program over a long period. Because of the need for flexibility, these tend to be descriptive, global statements of what is intended.

Goals do not have a deadline. They also are not measurable in exact terms because they often include subjective words like evaluate, know, improve and understand.

What goals do is serve as an anchor and framework for program planning. They provide a set of clear endpoints, around which you can organize many strategies or activities. As the situation evolves, your strategies and activities may change, but that rarely affects well-stated goals. Well stated goals are particularly important in situations where stakeholders may have conflicting goals, or when you need innovation or a new approach.

Short, medium and long-term objectives

Short, medium and long-term objectives create stepping stones – a series of changes needed to bring about sustainable long-term changes.

The steps and efforts needed to achieve the program goal will dictate your timeframes. In general:

- Short-term objectives are two months to 1 year
- Medium-term objectives are usually 1–5 years
- Long-term objectives are usually over five years

Well-crafted program objectives are SMART. That's an easy way to remember these key features:

- Specific (clear and precise)
- Measurable (amenable to evaluation, have the information needed to assess objective readily available and accessible)
- Appropriate (i.e., aligned with mandates and stakeholder expectations, theory and other evidence)
- Realistic (i.e., reasonable considering the resources and other circumstances)
- Time-limited

Step 4: Choose strategies, activities and assign resources

This step connects what you want to do (strategies and activities) with what you want to achieve (goals and outcome objectives).

Setting clear strategies and activities, assigning resources and writing process objectives provides:

- The foundation for detailed budgets and operational work plans,
- The information to determine indicators, which is key to making the program evaluable, and approximately half of the information for a logic model,
- Goals, objectives, strategies, activities and resources should:

- Be based on good evidence (collected in step 2, situational assessment),
- Be developed using well-founded processes (as described in step 1, project management), and
- Make sense together,
- If you do not meet the above criteria, you may want to collect more evidence or revisit decisions about the scope of your goal, audiences and outcome objectives.

Step 5: Develop indicators

It is about choosing indicators that assess the extent to which you've met your process and outcome objectives. Indicators help you decide whether your program is effective and successful. They help answer:

- How will you identify successful implementation?
- How will you know if you've achieved the objective?
- How will you measure progress toward your desired outcome?
- How will you know what is different after your program?

Outcome indicators

Outcome indicators measure progress toward your outcome objectives. Each objective should have one or more clearly defined indicators of success. Indicators can also provide a measure of progress for more than one objective. Indicators can be short-, medium- or long-term, consistent with the objectives they measure.

Process indicators

Process indicators measure both the quantitative and qualitative aspects of program delivery:

- Quantitative measures focus on numbers,
- Qualitative indicators use words.

Step 6: Review the plan Step Assess the plan for completeness

Ensure that the information in your plan includes everything you need to implement it. Your logic model, or other final program plan format, must also include the information stakeholders (specifically decision-makers) need, to provide feedback and support.

Consider the following questions to ensure your plan is complete:

- Does the program include broad goals?
- Have you identified audiences, including individuals, social networks, organizations, communities and governments?

- Are your outcome objectives SMART (specific, measurable, appropriate, realistic, and time-limited):
  - Specific
    - Well defined
    - Clear to anyone that has a basic knowledge of the project
  - Measurable
    - Know if the goal is obtainable
    - Find out when you have achieved your goal
  - Agreed Upon
    - Agreement with all the stakeholders what the goals should be
  - Realistic
    - Within the availability of resources, knowledge and time
  - Time-Limited
    - Enough time to achieve the goal
    - Not too much time, which can affect project performance
- Have you identified a few major strategies to advance the objectives?
- Do the activities fall within clearly defined strategies?
- Have you identified the resources (people, funds, materials) required?
- Does your plan have at least one indicator for each objective?
- Are the indicators reliable, valid and accessible?

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