



Day Two: Planning

Time Allowed

60 Minutes

Teaching Format

Troop presentation

Learning Objectives

As a result of this session, participants will be able to do the following:

1. Understand the value of planning as a step to reaching goals and fulfilling visions.
2. Plan an event or activity using the 7-Step Planning Process tool.
3. Use planning to help manage time.
4. Determine the next step when a plan does not deliver the desired outcome.
5. Utilize the Stop, Start, Continue method as an evaluation tool.

Materials Needed

- Visual aid(s) developed by presenter
- Computer
- LCD projector and screen
- Appropriate sound system for presentation venue
- Handout: 7-Step Planning Process Worksheet
- For each patrol: 1 lunch bag containing the following items:
 - 20 pieces of standard spaghetti noodles (uncooked)
 - 1 standard (not mini or special sized) marshmallow
 - 1 yard (3 feet) of 1-inch blue painters' tape or masking tape
 - 1 yard (3 feet) of cotton string (avoid thread or yarn)
- Measuring tape and stopwatch for facilitator

Recommended Presenter

NYLT staff member

Recommended Location

Troop assembly area

PRESENTATION OUTLINE

Note: Guide participants to locate the Participant Notes sheet for this session in the Participant Notebook. Encourage them to be taking note of key words, key points, and their top three takeaways from the session.

Introduction (5 min)

All participants in NYLT have been leaders in their home units—patrol leaders, crew officers, senior patrol leaders, etc. One of the requirements to attend NYLT was to have completed ILST or ILSC. Ask if they remember the three primary tools of leadership they learned during Intro to Leadership Skills. Their answers should be: **communicating**, **teaching**, and **planning**. Now we're going to spend some time talking about planning. (*Note: Evaluation is the last step of planning.*) We're going to begin with an activity that tests your planning skills.

Opening Activity (25 min)

Ensure each patrol is seated together in an area with a table or other stable base. Facilitators give the following instructions:

1. Each patrol will be given a bag with the same items.
2. Do not open the bag until you are given all the instructions.
3. You will have 15 minutes to build the tallest free-standing structure you can using only the materials in the bag. You cannot use the bag or anything not provided.
4. Open your bag and begin. Allow them to look at the items for 10–15 seconds, then say, "Oh wait, the marshmallow has to be on the top of the structure!"
5. Repeat instructions so that everyone hears, and then start the clock.

Troop guides shall watch but not participate or offer suggestions.

The presenter should walk around and, with the troop guides, observe to ensure rules are being followed. Do not offer suggestions or guidance at this point.

Look for how each patrol is handling the challenge. What process are they following? How is planning being conducted?

Give a warning when 10 minutes are left and again at 5 minutes. Give the last warning at 1 minute. Countdown the last few seconds.

Have troop guides help ensure no one is touching their structure when time ends.

Measure each patrol's structure and announce who has the tallest free-standing structure.

Reflection

Troop guides should pose the following to their patrols:

- Describe what you did to plan your tower.
- Describe a couple ways everyone's ideas were included in the planning.
- How do you feel about how well your patrol planned during the activity?



The Seven Steps of Planning (20 min)

Presentation Suggestion: This can easily be delivered with a single flip chart or single-slide PowerPoint presentation showing the Seven Steps of Planning graphic.

Explain that planning is what leaders do to ensure their team successfully achieves its goal, whether that is completing an activity (troop meeting, camping trip, or service project) or creating something (pioneering project, birdhouse, or marshmallow tower). Planning is the process teams use to define their goal, identify necessary skills and resources, consider alternatives, execute the plan, and then evaluate the results. Think of it as the means to efficiently reach your goals. It's the utensils you need to eat the elephant one bite at a time.

Planning helps us make sure we haven't forgotten anything and we are prepared if things don't go exactly as planned. Within Scouting, planning is also how we ensure everyone on the team has a voice in the process—planning is a team sport in Scouting.

One of the planning methods used in Scouting is the 7-Step Planning Process. If you want to take notes, the process is in your Participant Notebook.

1. Define the Specifics (4 W's and How)

- What is to be done, what is our goal, what is success?
- When does the project need to be completed?
- Where will the event or project take place?
- How will we achieve our goal? What are the steps that take us from now to completion?
- Who is responsible for the different elements of a project, activity, or longer-term event?

2. Identify the Resources (time, tools, and talent)

- How much time is available for planning? Develop a timeline that identifies the subtasks and the necessary (critical to other steps) and desired (minimal effect on other steps) completion dates.
- What skills, training, tools, materials, facilities, equipment, and funds are needed?
- How will you obtain the skills, training, tools, materials, facilities, equipment, and funds?

3. Consider Alternatives (What if . . .?)

- What might disrupt your event or project? (Weather, injury, people changes, equipment failure, failure to complete tasks by assigned due dates, etc.)
- How will you address the contingencies you have identified?
- Who can approve changes to your plan?
- When must those changes be approved?

4. Commit to the Plan (Own it)

- What are the decision points for committing (deposits) and Go/No-go?
- Make sure that all decisions and actions remain focused on achieving the plan's goal.
- Publish the plan (so everyone, including parents when necessary, knows What, When, Where, Who, and How).

5. Communicate the Plan

- Develop a method of communication.
- Leader communicates with team members responsible for each element of the plan.
- How will changes and updates be delivered and acknowledged?

6. Implement the Plan

- Put the plan into action.
- Have fun during the event or project.

7. Evaluate the Planning

- Assess your progress along the way.
- Evaluate the success of the planning process (Start, Stop, Continue).
- Reflect on the team's accomplishment or success of the activity after the event or project is completed.



Seven Steps of Planning



Decision-making is an inherent element of every step in the process. It is not a separate step. Servant-leaders ensure that every member of their team is included in the decision-making process. This ensures that everyone feels their interests have been considered and that all alternatives have been explored. Your team will have a better plan if everyone contributes than if one person does it all and tells the team what the plan will be.

Consider the following scenario: Perhaps your patrol's goal is to have a successful and fun Outpost Camp later this week. One of the elements of that goal could be enjoying a terrific camp meal cooked over backpacking stoves. Let's talk our way through using the planning tool by planning an Outpost Camp meal.

Have the participants refer to the 7-Step Planning Process Worksheet, either as a handout or already part of the Participant Notebook.

Demonstrate how to use the planning tool, either with a flip chart or PowerPoint presentation. (**Note:** *This should take about 10 minutes.*)

Ask participants, "What steps do we need to complete to be prepared for the meal?" Expect answers like, "Ask everybody what they want to eat"; "Look in my *Scouts BSA Handbook*"; "Plan the menu"; and "Go to the store."

Choose a task that is likely to happen earlier than most of the tasks, for example, "Plan the menu," and write that response next to **Define the Specifics**.

Ask: "How do you do this?" Acknowledge the participants' answers: "All are great answers, but let's think about the step-by-step process of planning the menu."

In the HOW column of the first sheet, record the steps. For example:

- Talk to patrol members about what they want.
- Select dishes to prepare.
- Find the recipes.
- List the ingredients and amounts.
- Determine the cost of the ingredients.

WHEN, as it relates to the goal, is when you will have the backpack meal. WHO in this case can all be the same person, but for a bigger project or event, you will likely have more than one person responsible for different elements of the plan.

Now that we have the columns filled out, we need to create a timeline. We do that by working backwards from when the project or event will occur. So, for our backpack meal at the Outpost Camp on Thursday night, we will pick up the ingredients from the quartermaster on Thursday morning. The QM knows what to give us because we gave them our list on Wednesday afternoon, based on the recipes and ingredients we chose on Wednesday morning.

We now need to think about what else we need. For a backpack meal, we need the stoves and fuel. We'll also need to carry the right pots and utensils. We're carrying it on our backs, so we need to take exactly what we need and nothing more. Also, we need to think about the skills or training the project or activity requires. This is not kayaking or rock climbing, so

special training won't be needed, but it would be smart to identify the best two backpacking cooks in our patrol.

The last thing we need to do for this plan right now is to think about what could go wrong. If it's raining, then we'll need to make sure we get the dining fly up and secure. If one of our great cooks gets hurt or becomes ill and cannot go, then we will want to have a second cook to take over.

If this were a bigger project or more complicated event, we would continue filling out the planning form. But for now, you have a pretty good idea about how the 7-Step Planning Process works.

NATIONAL YOUTH LEADERSHIP TRAINING

7-Step Planning Process Worksheet

Define the Specifics *Plan the menu*

What: *Delicious backpack meal*

When: *Thursday night*

Where: *At the Outpost Camp*

How: _____ Who: _____

1. <i>Talk to patrol members about what they want to eat</i>	[name]
2. <i>Select dishes to prepare</i>	[name]
3. <i>Find recipes</i>	[name]
4. <i>Create list of ingredients and amounts</i>	[name]
5. <i>Determine the cost of the ingredients</i>	[name]

Identify the Resources

Timeline (backwards from completion point):

Today	Wednesday Morning	Wednesday Afternoon	Thursday Morning	Thursday Evening
Start	Find recipes	Deliver ingredients list to the QM	Collect the food	Complete/Prepare the meal

Skills needed and source: *Backpack stove cooking experience—(names of patrol members)*

Tools and equipment needed and source: *Backpack stoves (QM), cooking pots (patrol box), utensils (patrol box), lighter (patrol box), fuel for stoves (QM)*

Training needed and source: *None*

Costs: *None. Included in NYLT fee.*

Consider Alternatives

Contingency	Mitigation
<i>Inclement weather</i>	<i>Cook and eat under dining fly</i>
<i>Cook gets hurt or ill</i>	<i>Have a second backpack stove cook</i>

Commit to the Plan

When will the plan be completed and distributed?

What are the decision points?

Deposits due from team:

Deposits due to others:

Go/No-go date:

Communicate the Plan

How will the team communicate before the event?

How will the team communicate during the event?

Implement the Plan

Evaluate the Planning

Start (do differently next time to plan better):

Stop (not do next time because it was not helpful):

Continue (do again because it worked well and made our plan better):

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Evaluating the Plan (5 min)

The final step in planning is to evaluate how well your plan achieved the desired goal or objective. During your patrol meetings yesterday and today, the troop guides demonstrated how to use the Start, Stop, Continue tool to judge how things are going and consider improvements that could be made. The tool is a simple but effective way to evaluate a team's or your own performance. It's also the evaluation tool we use during NYLT.



Let's look at the three parts of Start, Stop, Continue:

Start: "What should we do differently next time to plan better?"

Stop: "What should we not do next time because it was not helpful?"

Continue: "What should we do again because it worked well and made the plan better?"

The Start, Stop, Continue tool is to be used to provide constructive ways to improve. It is two positives with a negative sandwiched in between. The patrol should evaluate its performance after it completes an event or a project. Remember, you're evaluating how well the planning process was done and not on the success or the event or how much fun you had.

Summary (2 min)

Why do leaders plan? Planning is essential for the team to reach its goals. Goals are steps to achieving your vision.

Planning is one of the three primary tasks of leadership, along with communicating effectively and training your team.

Planning is a means of effectively reaching goals.

To accomplish goals, you must have good planning.

Scouting America's 7-Step Planning Process provides a simple yet effective tool to ensure successful planning. The Start, Stop, Continue method ensures your team evaluates the effectiveness of the planning, but more importantly sets your team up for future and greater successes.

Remind participants to take a moment to ensure they have noted their top three takeaways in their Participant Notes for this session.



7-Step Planning Process Worksheet

Define the Specifics

What:

When:

Where:

How:

Who:

1.	
2.	
3.	
4.	
5.	

Identify the Resources

Timeline (backwards from completion point):

Start

Complete

Skills needed and source:

Tools and equipment needed and source:

Training needed and source:

Costs:



Consider Alternatives

Contingency	Mitigation

Commit to the Plan

When will the plan be completed and distributed?

What are the decision points?

Deposits due from team:

Deposits due to others:

Go/No-go date:

Communicate the Plan

How will the team communicate before the event?

How will the team communicate during the event?

Implement the Plan

Evaluate the Planning

Start (do differently next time to plan better):

Stop (not do next time because it was not helpful):

Continue (do again because it worked well and made our plan better):