# Project Plan Template

## Purpose

To draft the scope of work for your ERB project and figure out team roles and responsibilities. You can complete this template as-is or adapt it to meet your needs. It is intended to be a living document that you can revisit periodically throughout the process of using the ERB tool. The ERB contains a lot of possible activities. The project plan helps the core team decide and manage the activities they decide do and keep progress on track, based on goals they set.

## What you will need

**Who:** core team, activity lead (to facilitate meetings), recorder (to fill out the project plan template)

**Where:** in-person or virtual meetings

**How long will it take:** estimated ½ hour to 1 hour for each part of the plan, depending how in-depth the conversation goes and how many project parameters have been set already (e.g., due dates, deliverables)

## Part I. Core team Kickoff

**Step 1. Introductions.** Possible topics:

* What experiences and skills do you have that you bring to the team?
* What resilience-related issues or concerns do you hope will get addressed?

**Step 2. Establish group norms for team interactions.** Decide on issues such as:

* How will we communicate with each other?
* Who has the power to make which decisions?
* How will we resolve conflicts?
* How do we make sure everyone on the team is heard?
* What are our core values for working together?

**Step 3. Coordinate next steps.**

* Figure out a preliminary team meeting schedule and venue
* Decide on the topic and roles for the next meeting, e.g., who will facilitate or take notes?

## Part II. Set goals for using ERB

Set initial goals for why your team is going through the ERB process. Your goals may depend on key local issues of concern and any specific mandate you have. These goals will help you figure out which activities to do and whom to include. The team might need to refine or change their goals as they go along, especially as they engage with a wide range of local constituencies.

**Step 1. Discuss what brings the team to ERB**

* Is this a new project or part of an existing project?
  + Example: develop an urban heat plan or update a sustainability plan
* Is there a specific deliverable or product you need to prepare?
  + Example: grant proposal, hazard mitigation plan
* What resilience work is already going on in your community?
  + Example: emergency preparedness trainings for local residents, installing green infrastructure to manage stormwater

**Step 2. Discuss problem framing questions.** If you’re not sure where to get started, consider:

* What disaster and climate risks will your community need to address in 5-10 years?
* What issues of concern do you hear from local businesses, organizations, and residents?
* What are the biggest barriers or constraints to addressing these issues?
* Who participates in decision-making on these issues—who else should be included?
* How has COVID-19 exposed challenges and inequalities that still need to be overcome?

**Step 3: Decide on a set of goals to meet by the end of the ERB process.** Draw on the discussion from Steps 1 and 2. For ideas check out the *example* at the end of this template. Consider:

* What environmental, disaster or climate hazards are most problematic?
* Which populations are most at risk from these hazards?
* How to better connect agencies and organizations working on resilience?

**Step 4. Record your team’s draft goals below.**

**Goals:**

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step 5.** **Reflect and refine your initial goals**. At any point in the ERB process, think about:

* Are these achievable given the available timeframe and resources?
* Do they address equity issues?
* Who else should provide input to refine these goals?

## Part. III. Select ERB activities

Look through Menu of Activities (below) and check which ones look most interesting. See the *example* at the end of this plan of what other communities have done. For more information, check out the activity pages and instructions in the tool. Take into consideration:

* The team’s goals for using ERB and products you need to deliver
* Timeline and resources available
* Existing connections with community organizations and residents

**Menu of ERB Activities**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Activity** | **Interest?** | **Considerations** *(examples listed)* |
| **Engage your community** | Equity in engagement exercise |  |  |
|  | Identify & diagram community connections |  | *Degree of existing connection core team has* |
|  | Develop a community engagement plan |  |  |
|  | Start community engagement |  |  |
| **Assess Hazards, Equity, and Resilience** | Hold workshop 1 to share experiences and local knowledge on hazards and equity |  |  |
|  | Gather additional data to assess hazards |  | *Familiarity with online data sources on this topic* |
|  | Gather additional data to assess equity |  |  |
|  | Gather additional data to assess the resilience of built, natural, and social environmental systems |  |  |
|  | Hold workshop 2 to share data gathering results and collaboratively assess resilient systems |  |  |
| **Strategize Actions** | Identify action areas to focus on for strengthening resilience |  |  |
|  | Hold workshop 3 to collaboratively identify and prioritize actions to address these problems |  |  |
|  | Complete strategy chart |  |  |
| **Wrap Up and Move Forward** | Take next steps for Implementation |  |  |
| Funding and finance guide |  |  |
| Carrying out final outreach and engagement |  |  |
| Monitoring and planning for future action |  |  |

## IV. Roles, rules, and responsibilities

## Project timeline

We recognize your timeline may vary depending on deliverable due dates, activities selected, existing community connections, your team’s availability, and other events happening in your area. Here is a table to help you map out your timeline.

**Table 1. Project Timeline**

|  |  |  |
| --- | --- | --- |
| **Activity** | **Start to finish how long it’ll take** | **Start date** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

FINAL Due Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Who is doing what

A project’s success benefits from coming to agreement over what people are committing to by being on the project team. Discuss everyone’s time availability, preferences for roles and responsibilities, other constraints, and capacity. As you undertake specific activities, decide who you need to pull in as individual contributors to carry out a limited series of tasks. You can use Table 2 as an example and modify it according to your own needs.

**Table 2. Example Roles and Responsibilities**

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Member** | **Affiliation** | **Role** | **Responsibilities** |
| Betty Doubtfire | City sustainability coordinator | Team lead | Lead team meetings  Submit products |
| Li Yuan | Youth intern in the mayor’s office | Logistics helper | Take notes at team meetings  Coordinate with workshop venue locations |
| Derek Roberts | Environmental educator | Workshop facilitator | Facilitate workshops |
| Mario Herrera | Pastor, Nuestra Señora de los Dolores | Community engagement lead | Implement community engagement plan  Recruit workshop participants |
| Nadia Stablinski | Geographer, New State University | Resilience evaluator | Lead data collection for hazards assessment |
| Tanya Frost | Anti-hunger activist | Resilience evaluator | Lead data collection for equity assessment |
| Jason Miller-Ashburn | County public works department | Resilience evaluator | Lead data collection for resilient systems assessment |

## What to do next

After completing the project plan, go to the Reflection and Next steps page of the Plan section. You can come back here and modify the plan at any time.

## Example of how different types of users have used ERB

| **Lead Organization** | **ERB fits into existing** | **Goals for using ERB** | **Activity Selection (√ = included some or all; O = skipped)** | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Plan** | **Engage** | **Assess** | **Strategize Actions** | **Move Forward** |
| EPA Region, community organization | Emergency prepared-ness planning | Address EJ in disaster risk reduction |  |  |  |  |  |
| Get a core team together | Diagram community connections | Hazards storytelling  Collect hazards data | Define action areas | [beyond scope] |
| Local environmen-tal organization | Watershed resilience planning | Include equity in resilience plan |  |  |  |  |  |
| [Already had a work plan and team] | [Already had strong connections] | Hazards  storytelling  Participatory mapping | [Limited technical capacity, time] | Monitor |
| County emergency manager | Hazard mitigation plan update | Incorporate lessons from COVID-19 pandemic |  | o then ü |  |  |  |
| Select goals & activities  Create project plan | [Initially not due to time; it emerged as a priority] | Collect hazards, equity, resilient systems data | Brainstorm actions  Strategy chart | Implement actions |