

CREATING PROJECT PLANS

After the Planning Assembly, the LSB decides who is best suited to develop project plans. It may be helpful to divide and assign the projects. Those specific to H&I, PI/PR, and phonenumber, may be handed over to their respective coordinator. Likewise, the LSB might take on plans or assign them to a workgroup. Involving members familiar with the service can help to identify the necessary steps to take to achieve the goals.

Each group working on projects will create a plan that addresses:

- What tasks need to be done
- When these tasks need to be accomplished
- Who the trusted servants responsible will be, including a responsible accountable point person to track progress
- How much time and money will be involved

Project Plan Steps

1. Review the identified issue and goal or solution from the Planning Assembly
2. Brainstorm some possible approaches for achieving the goal; rank those approaches. (See the sample project plans on the pages that follow for examples of approaches.)
3. Identify the highest ranked approach(es) that will achieve the goal
4. Identify the actions that need to be done to achieve each approach, consider sequence and priority, include measurable milestones and completion dates
5. Estimate or identify what resources (people and money) are needed for each action and when they are needed
6. Identify trusted servants responsible for completing each action; Identify point of contact for LSB
7. Define reporting expectations, including unforeseen problems that arise between LSB meetings

Considerations, once all project plans have been completed:

1. Are the proposed actions reasonable?
2. Is the “what”, the “who”, the “when” and the “how” identified in each project plan?
3. Are there resources for all project plans? Is there a meaningful sequence or prioritization to taking on project plans?

Project Plan Approval

Once projects are developed, presentation and approval of each project will happen at the second LSC.

The Feedback Loop

Considering all input is vital to the planning process. We want to understand what is working and what is not, so we can adjust. Monitoring the progress of our plans helps ensure that they are accomplishing the intended goals. When we keep accurate records and maintain accountability through reporting, we contribute to the long term planning process. We want to keep track of the time and money that are involved in accomplishing any goal. This helps create realistic plans in the future.

In addition, we will want to consider how long these actions may take and how often the responsible members will report back to the LSB. The LSB will monitor the work on an ongoing basis and report to the LSC quarterly.

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Sample Project Plans

There are a couple of sample project plans in the pages that follow to give an idea of what your project plans might look like. For the sake of this example, we'll say that two of the issues that were prioritized by our LSC planning assembly were 1. Not enough trusted servants providing ongoing services, and 2. Unreliable and expensive helpline provider. At the planning assembly, the LSC prioritized solutions for these issues: 1. To raise awareness of PR and H&I service, and 2. To switch to a better phonenumber service. These two solutions were turned over to the LSB to develop projects for the year ahead.

Intro to Sample Project Plan One

Following the Project Plan Steps from page one, we first review the identified goal or solution (step 1): "To raise awareness of PR and H&I service."

Then we brainstormed and ranked possible approaches (steps 2 & 3). Our number one approach for this sample, was to hold a learning day. The actions that need to be taken to achieve this approach (step 4) will be determined in the first two workgroup meetings, which will function as planning meetings. The sample project plan below gives an estimate of resources needed (step 5). Some of the trusted servants responsible for completing each action (step 6) are outlined in the project plan; others will be identified by the workgroup as a plan takes shape. Reporting expectations (step 7) are outlined in the project plan.

Sample Project Plan One – Learning Day

Description of Project: To plan and implement a PR/H&I learning day event in Anytown on September 12, 2013.

Workgroup: The delegate from Anytown to the region/state body will serve as the workgroup leader and LSB point of contact. Also on the workgroup: one member from the LSC who has worked on securing the facilities, two members of the last Anytown Learning Day working group (from 2012) to provide continuity, and two members with PR/H&I experience to bring PR/H&I content into the learning day.

Planning Meetings: The workgroup will meet four times prior to the Learning Day. The first planning meetings will be February 2013. There, workgroup tasks will be determined and assigned. The dates of the following planning meetings will be determined by the workgroup.

Location of Planning Meetings: XXX Neighborhood Park- first three meetings. The final planning meeting will be at the Learning Day location.

Reporting to LSB:

The Anytown delegate will provide monthly updates, including task assignments, to the LSB prior to the event. The LSB chairperson will be the point of contact between LSB meetings.

The delegate will also provide a final post-event written report to the LSC, including a financial report and recommendations for the next learning day.

Approximate Costs:

Park meeting space: No charge

Facility Rent (Fourth Planning Meeting and Learning Day): \$150 (needed March 2013 to reserve space)

Copies, Supplies, and other workshop materials: \$100 (needed August 1, 2013)

Refreshments: \$50 (needed September 1, 2013)

Total Estimated Project Costs: \$300

Anticipated Project Completion Date: September 2013, with final report submitted at the October LSC meeting.

Intro to Sample Project Plan Two

Following the Project Plan Steps from page one, we first reviewed the identified goal or solution (step 1): “To switch to a better phonenumber service.”

Then we brainstormed and ranked possible approaches (steps 2 & 3). Our number one approach for this sample was to comprehensively investigate the different technology options for phonenumber service. The actions that need to be taken to achieve this approach (step 4) will be determined by the workgroup itself and regularly reported to the LSB (step 7) as outlined in the project plan. The completion date (step 4) is included in the sample project plan, which also gives an estimate of resources needed (step 5) as well as the trusted servants responsible for completing each action (step 6).

Sample Project Plan Two – Phonline Technologies Options

Description of Project: A six-month effort to explore technology (hardware and software) options for our current phonline service, to begin February 2013.

Workgroup: The PR coordinator will serve as the workgroup leader and LSB point of contact. Also on the workgroup: website coordinator (has technology background), two current phonline volunteers.

Meetings: The workgroup will use web meetings and email to share information, as face-to-face meetings are not required. The workgroup will meet monthly, no less than one week prior to the month LSB meeting. Workgroup tasks will be determined and assigned that the first meeting, and the exact dates of the meetings will be determined by the workgroup.

Reporting to LSB:

The PR coordinator will provide monthly updates, including task assignments, to the LSB each month. The PR coordinator will also serve as the point of contact between LSB meetings.

The PR coordinator will provide a final written report to the LSB. The report will include information on the technologies considered, including good and bad points for each, and costs and any maintenance issues. The report will also include recommendations from the workgroup.

Reporting to the LSC: The LSB will provide a summary and recommendation to the LSC after the workgroup has completed their task.

Approximate Costs:

There are no foreseeable costs at this time.

Project Completion Date: August 2013, with final report submitted at the October LSC meeting.

This draft was produced for the Service System Proposals field test. It is a work in progress. Please send any input on the draft to: worldboard@na.org.