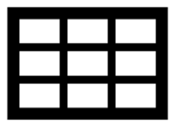
How to Eat and Elephant: Project Planning One Bite at a Time

Laura Pinsoneault, Ph.D., Founder & CEO Evaluation Plus
Emily Connors, M.S., Research & Planning Analyst, ProHealth Care

What comes to mind when asked, “what tools do you use for project planning”. Likely what first comes to mind are:

To Do Lists



Spreadsheets

Calendars

These are all helpful technologies for project planning, but they aren’t tools. A tool aids in getting a task done; it moves the work forward. Simple conditions can be addressed with simple tools, but complex conditions and relationships (like the ones we typically deal with) need tools that move the work forward while being adaptive and responsive to new conditions along the way. These tools are called adaptive learning tools because they allow a group to build a roadmap for the current conditions using the expertise and experiences of lots of different perspectives invested in the conditions while at the same time leaving room to take an alternative route if needed.

The tools in this toolkit are relatively basic planning tools that can be use in facilitated and non-facilitated ways to help move a project forward. The assumption behind these tools is that everyone is invested in the project being a success and that everyone involved is bringing valuable expertise that is needed to get there—it just needs to be harnessed. Using these tools also helps ensure that one person isn’t farther down the road than the rest of the team and when used in the right way for the right job, builds trust and engagement across the team.

This toolkit contains:

1. Summary table of some basic tools for getting started and links to access them
2. Link to Framing Questions Handout: https://www.eiseverywhere.com/file_uploads/18ba8ec1a5e3a74f53bc20f1675f927a_MistakestoSuccessALCSession.pdf
3. Templates for the Pre-Mortem, BAR and AAR, and Six Hats
4. *Go Slow to Go Fast: Successful Engagement Strategies for Patient-Centered, Multi-Site Research Involving Academic and Community-Based Organizations* https://www.ncbi.nlm.nih.gov/pubmed/30353249

For more information on the toolkit, please contact Laura Pinsoneault at laura@evaluationplus.org

ADAPTIVE PLANNING PROJECT TOOLS

Tool	Purpose	Is best used for...	Preparation	Time	Remote	Resource Link
Pre-Mortem	Full Project Plan	identifying potential barriers and complications mitigating and preventing failure leveraging strengths of team	gather materials for facilitation	2-3 hours		https://hbr.org/2007/09/performing-a-project-premortem
Accelerated Action Planning	Event of Phased Activity Action Plan	developing action or workplan identifying milestones calendaring work	project background information, space for small and large group work	2-3 hours		https://acceleratedactionplan.com/wp-content/uploads/2015/02/AAP-Template-Pack.pdf
Before Action Reviews	Focused Activity Action Plan	identifying strategies to achieve desired outcomes helping focus partners on action identifying resources securing commitment to act	generate framing question and facilitation tools	5-60 minutes		https://www.rethinkhealth.org/resources/emergent-learning-before-and-after-action-reviews/
After Action Reviews	Learning	assessing the effectiveness of a strategy understanding why it produced the result it did focusing on 'what contributed' not on 'whose fault'	generate framing question or transfer BAR data into facilitation tools	5-60 minutes		https://hbr.org/2005/07/learning-in-the-thick-of-it
Learning Circles	Learning	engaging partners at multiple levels to use data for learning in real time deepen understanding of emergent outcomes inform adaptation and decision making	framing question, advance data collection and prep work by participants	2-3 hours		http://www.buildingmovement.org/pdf/Learning_Circle.pdf

ADAPTIVE PLANNING PROJECT TOOLS

Tool	Purpose	Is best used for…	Preparation	Time	Remote	Resource Link
Right Now Survey	Check-Up	needing to take the pulse of a large group of partners providing a confidential space to surface needs	print tool	5 minutes		https://www.collectiveimpactforum.org/sites/default/files/SparkPolicy-The%20Right%20Now%20Survey.pdf
Team Check In	Check-Up	reflecting on previous activities developing plans for immediate next steps assigning roles	none	varies		https://acceleratedactionplan.com/wp-content/uploads/2019/01/TeamCheckIn_2.pdf
Process Evaluation Tracking Sheet	Process Evaluation Tool	inclusiveness in decision making accountability to communication identifying needs	none	15-20 minutes		http://tools.sparkpolicy.com/introduction-overview/evaluating-engagement-strategies/
Partnership Assessment Tool for Health (PATH)	Process Evaluation Tool	determining effectiveness of partnership building trust and facilitating open communication identifying areas for improvement	adapt tool, process individual assessments and develop follow-up discussion	30-45 minutes		https://www.chcs.org/resource/partnership-assessment-tool-health/
Collaboration Factors Inventory	Partnership Planning & Evaluation	assessing partnership health identifying areas for improvement	none	15 minutes		https://www.wilder.org/wilder-research/research-library/collaboration-factors-inventory-3rd-edition
Six Thinking Hats	Perspective Sharing	brainstorming ideas problem solving perspective taking	handout of six hats and framing questions	15-30 minutes		https://www.mindtools.com/pages/article/newTED_07.htm https://www.storyboardthat.com/storyboards/nathanael-okhuysen/the-six-thinking-hats

Tool	Purpose	Is best used for…	Preparation	Time	Remote	Resource Link
Four Truths	Perspective Sharing	identifying similarities and differences finding common ground for problem solving developing trust and understanding	review model and set up conditions for trust; align questions with facilitation technique	varies		https://www.15five.com/blog/use-4-question-types-facilitate-effective-meetings/

= remote option viable

= remote option possible, but not ideal

PREMORTEM INPUT SHEET

We are using a Premortem prior to launching a large community engaged evaluation research project (summary below). In order to plan for this project—and identify strengths and solutions to likely barriers and challenges—we are using this to help brainstorm all the reasons this project could fail and develop plans to mitigate these failures.

Project details:

After many months of working on a large grant for a community engaged research project, your organization receives notice that the grant is funded. The project involves individuals from 3 nonprofits in three different states (NY, CA, and FL) and an academic researcher from a local university in FL. The focus of the research grant is on a peer-to-peer support program for older adults. All of the organizations implement the program and want to evaluate the outcomes of the program.

The grant lays out high-level phases of the project, but little focus on how the team will work together to achieve the goals of the grant. Over the three years, each organization is responsible for recruiting older adults into the study (target goals and timing of those are set). Participants complete a pre/mid/post assessment over three years' time and each organization is responsible for entering the data into a shared data system. The academic researcher and directors from each nonprofit are leaders on the project. A budget was developed. Each organization will receive funding to hire research assistants to help manage the program, minimal funds for general expenses, and some travel dollars for face to face visits (5 during the 3 years). Yearly progress reports are due to the funder and a responsibility of the academic researcher to submit.

This form adapted from the CUSP Tool: Premortem How-To-Guide.
https://www.hopkinsmedicine.org/armstrong_institute/_files/cusp_toolkit_new/Premortem-Tool.pdf

Today: Imagine that we are 3 years into the future and imagine that lots of things have gone wrong on tons of fronts. What could have caused this? Spend the next 10 minutes writing down all the reasons you believe this failure occurred. For now, work independently and write down anything that comes to mind.

Reasons for Failure “What could have caused this?”	Level of Concern 1 = lowest concern 5 = highest concern	Action Steps to Prevent Failure “What can I do differently”

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PREMORTEM RESULTS

Date of Premortem:

Participants:

Top Concerns	Strategic Response	Person Responsible
1.		
2.		
3.		
4.		

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https://www.hopkinsmedicine.org/armstrong_institute/_files/cusp_toolkit_new/Premortem-Tool.pdf

PLANNING YOUR BEFORE ACTION REVIEW (BAR)

❑ STEP 1: TO BE COMPLETED PRIOR TO THE BAR

Decide what the main question is that you want to answer with your BAR. To craft this question, think about the relationship between what you want to do and the difference it will make.

Examples:

- How can we ensure our report helps the partners on the project transition from talking about solutions to selecting and acting on one solution?
- What will it take to ensure the participants at the forum leave with greater buy-in and interest in personally engaging in the project?
- How can we plan the series of strategies in this project to cumulatively assist our client to develop and implement a solution to <their problem>?
- What will it take to overcome the <specific type of challenge> and achieve the intended outcome of the project?

❑ STEP 2: THE BAR FACILITATED DIALOGUE

Stay focused and on task. Our time is limited, and we want to leave with something that will be helpful!

Facilitator Questions:

1. Who can take notes for us today? (see template at end of BAR tool)
2. At a high level, what are the intended outcomes of the strategy or strategies being reviewed?
3. What, in practical terms, do those outcomes really look like?
    a. Consider the decision-makers who need to act and how they can be influenced.
    b. Consider the audience of the strategy and how you want them to change.
4. What are some of the challenges we might encounter?
5. What have we learned from the past that might be important to consider here?
6. Given all that, what does that mean for what we'll do – how can we craft our strategy to align with the planned outcomes?
7. When do we want to do an after-action review and who will be part of it?

❑ STEP 3: USE THE RESULTS!

PM integrate results from the notes into implementation plan.

BEFORE ACTION REVIEW NOTES

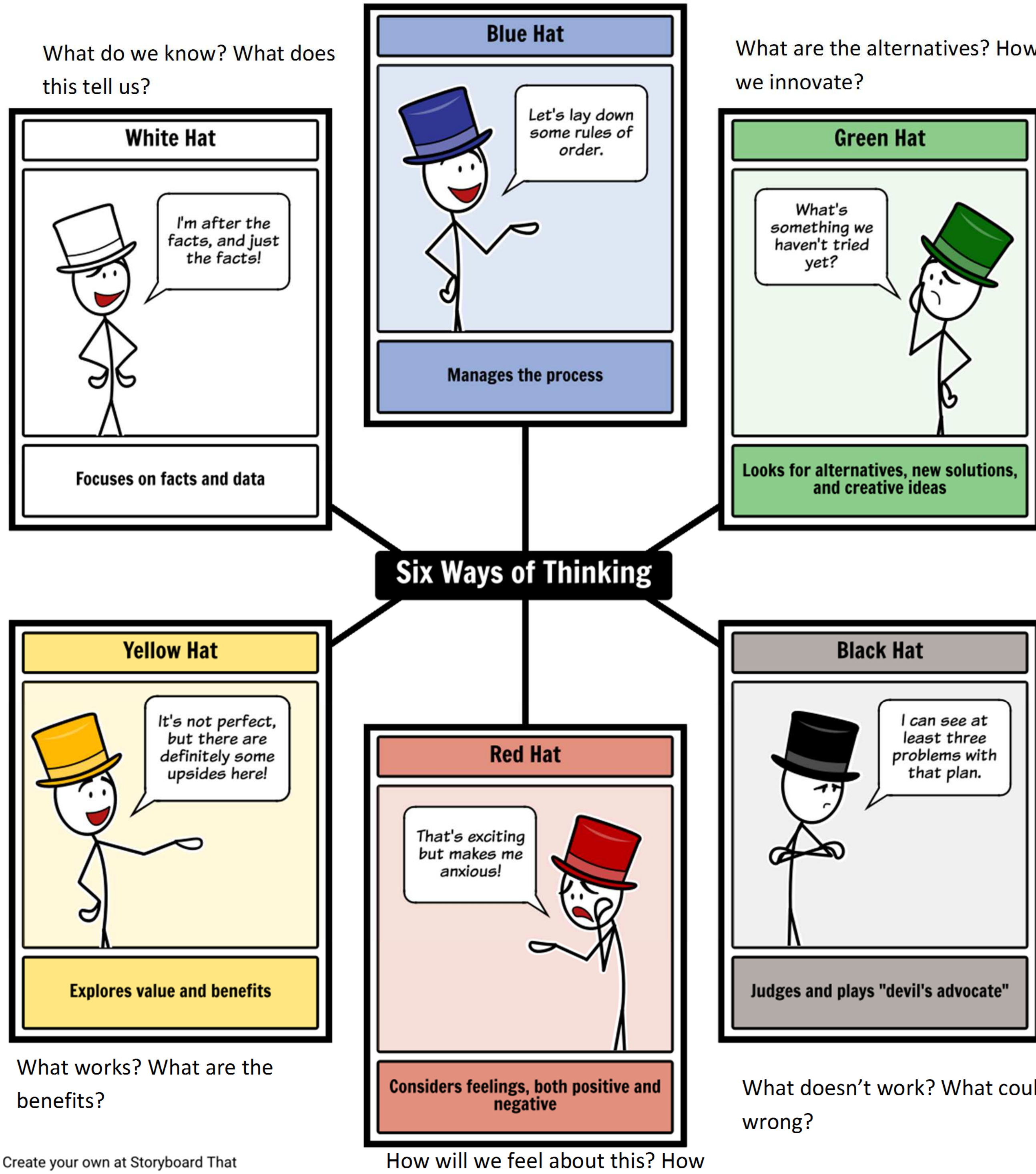
FRAMING QUESTION:
DATE:
PARTICIPANTS:

What are our intended results?	What will make us successful this time?
What challenges will we be facing?	What can we learn from past experience?

How do we approach this problem? What are the ground rules?

What do we know? What does this tell us?

What are the alternatives? How can we innovate?



What works? What are the benefits?

How will we feel about this? How will others feel about this?

What doesn't work? What could go wrong?

https://www.storyboardthat.com/storyboards/nathanael-okhuysen/the-six-thinking-hats