

PROJECT PLANNING TEMPLATE

This template is designed to walk project leaders through a series of prompts and questions that can lead to a logical, informed plan for achieving your project goal. No plan is perfect, and you should never be closed off to making adjustments to adapt to new information, shifting realities, or other changes. This may happen in the middle of the planning process or even after you’ve started your project. By taking the time to create this plan, you will be better equipped to adapt to these changes swiftly and effectively.

**This project planning template follows the EcoLeaders Project-Based Learning and Leadership Model which consists of** **four project management phases: plan, do, communicate, and sustain**. We think of these four project phases as a continuous learning and leadership cycle that serves as a template for EcoLeaders throughout the lifecycle of your project. The cycle will guide you through the phases of planning, implementation, communication, and project sustainability with the ability to revisit phases when you need to make adjustments.

**This tool is designed to be used in conjunction with the online EcoLeaders Project Planning Resource Library which has links to resources in each of the four project planning categories:** [**http://www.nwfecoleaders.org/project/start**](http://www.nwfecoleaders.org/project/start)

Additionally, make sure you search through existing and completed EcoLeader projects in the EcoLeaders community to gain insights, examples, and ideas from other EcoLeaders to help inform your project planning process!

**Overall Project Goal: What is the main outcome you wish to achieve through your project?**

Before digging into project planning you need to determine what your main project goal is. This is the big, end-result goal, we’ll get to shorter term goals in a bit. When determining your goal it is helpful to think about what problem you are trying to address and what you ultimately hope to achieve through your project. This is the goal you will reference throughout the project planning process to make sure all of the elements of your project plan are working towards this end goal. And remember, it’s okay to revise your main goal later if needed.

*Example: Create a vegetable garden on campus* *to help the campus community learn how to grow their own food and provide a locally-grown food source in the larger community* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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# Step 1: Plan

Now that you have determined your overall project goal, it’s time to start the planning process!

One of the most important things to do before jumping into a project is to be sure you are adequately educated on the issue - read up on the topic or issue, research similar projects, and talk to folks who have done relevant work. Now is also the time to set short-, medium-, and long-term goals for what you would like to achieve through your efforts and think about what the indicators of success will be and what milestones will get you to your end goal.

\**Remember to check out the “Plan” resources provided in the EcoLeader Project Planning Library to help you in this first step of planning and throughout the lifecycle of your project:* [*http://www.nwfecoleaders.org/project-plan-resources*](http://www.nwfecoleaders.org/project-plan-resources)

**Research**

Take time to brainstorm a research list – what questions do you have related to your project that you’ll need to do a bit of research on? Who are the people you should talk to who might have valuable knowledge about your issue area? This will also be a useful list to share with your project team to help inform them about topic area as well.

*Example: Search EcoLeaders projects to see if there are other students who have started gardens on their campus that I can connect with* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Project Scope – where will your project have the most significant impact? (check one)**

 Campus

 Community

 State

 Regional

 National

 International

**Strategy - Which strategy fits best with the scope of impact of your project? (check one or more)**

 Advocacy

 Community Building

 Communications/Marketing

 Education

 Financing

 Investment

 Policy

 Research

 Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Which EcoTopic area(s) will your project support? You may choose more than one.**

Remember to check out the EcoTopic pages on EcoLeaders to access project ideas and resources for your project’s topic area(s). <http://www.nwfecoleaders.org/explore-ecotopics>

 Buildings

 Community & Environmental Justice

 Energy

 Habitat & Wildlife

 Transportation

 Climate Adaptation

 Consumption & Waste

 Food

 Purchasing

 Water

 Outdoor Recreation/Leadership

**Goal Setting**

You’ve already determined what your big, main goal is, now it’s time to break it down a bit into short term, mid-way term and long term goals. Keep in mind these are the goals that you will use to monitor and evaluate the progress and success of your project so it’s important to make sure all of your goals are “SMARTIE” by using the following criteria:

**S** – Specific (or Significant)

**M** – Measurable (or Meaningful)

**A** – Attainable (or Action-Oriented)

**R** – Relevant (or Rewarding)

**T** – Time-bound (or Trackable)

**I** – Inclusive: It brings traditionally marginalized people—particularly those most impacted—into processes, activities, and decision/policy-making in a way that shares power.

**E** – Equitable: It includes an element of fairness or justice that seeks to address systemic injustice, inequity, or oppression.

**Short-term goal:**

*Example: Gain proper approval from university to build a community garden on campus by and assemble a team of at least 10 volunteers who are committed to help by the end of the first term of the 2019/20 school year*

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**Mid-way goal:**

*Example: Raise necessary funds for garden construction determined by budget planning process and recruit additional volunteer support needed for construction of the garden by the end of the Fall semester.*

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**Long-term goal:**

*Example: Complete construction of 150 square foot campus garden, and begin growing plants and harvesting with the community by the end of spring semester!*

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**Recruiting supporters – what type of help and support will you need to make your project successful?**

Remember, many hands make light work. It’s important to be able to solicit help where you need it and to draw on the varying strengths of your community. Consider what type of people-power you may need - volunteers, co-leaders, folks to help you plan, implement, etc. - and create plans for recruiting those people to your team. **Make a list of the people or types of people you will need to recruit to help with your project and the method for doing so.**

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| **Project Supporter** | **Recruitment Method** |
| *Example: University Sustainability Director* | *Request a meeting and make a pitch* |
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**Budgeting/Fundraising**

There are many ways to find funding for your project. It’s important to research the options available and set realistic goals and plans for raising the funds needed to achieve your desired outcomes and sustain your effort. Take some time to start to do some initial calculations of roughly how much think it will cost to achieve your project goal and record that information here. Once you have that number in mind you can start brainstorming how you might raise thatmoney.

\**Be sure to check out the resources on how to develop and manage a budget in the EcoLeaders Project Planning Resource Library:* [*http://www.nwfecoleaders.org/project-plan-resources*](http://www.nwfecoleaders.org/project-plan-resources)

**Estimated overall project cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fundraising ideas:**

*Example: Explore if there is any money available through the school for student-led environmental projects like through a “green fee” program \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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# Step 2: Do

\**Remember to check out the “Do” phase resources provided in the EcoLeader Project Planning Library to help you in this second step of planning the action phase of your project as well as throughout the lifecycle of your project:* [*http://www.nwfecoleaders.org/project-do-resources*](http://www.nwfecoleaders.org/project-do-resources)

**Develop an Action Timeline**

Now that you have determined your goals, thought through strategy, volunteer recruitment and fundraising, it’s time to start mapping out an action plan for all of these activities. This worksheet can be used for both semester- and year-long activities.

\**Check out the downloadable Project Management Plan customizable template in the EcoLeaders Project Planning Resources library to use to create a comprehensive action timeline and plan once you’ve completed your project planning process.* [*http://www.nwfecoleaders.org/project-do-resources*](http://www.nwfecoleaders.org/project-do-resources)

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| **Week or Month** | **Actions/Benchmarks** | **Who is responsible** |
| *Example: September* | *Request meeting with University Sustainability Director to pitch idea*  | *Myself* |
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**Potential Risks / Strategies to address them**

Inevitably, all projects face various risks and obstacles and unfortunately you can’t foresee all of them, but it is important to take the time to think through potentials and risks or obstacles that may pop up and some strategies you can use to address them so you can be prepared.

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| **Potential risk/obstacle** | **Strategy to overcome it** | **Who on project would be best to address challenge?** |
| *Example: No available money through school to help fund the project* | *Apply for grant money and/or approach local businesses for sponsorship* | *Fundraising lead* |
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**Project Advocacy and Networking**

For an effort to be successful you need to strategically advocate for it and share your passion with others to gain support from key players. It will be important to **brainstorm the methods that you think will be most successful in gaining the support you need** - maybe it means holding a rally or sending a letter to an elected official or attending an event where you could meet with key advocates for your project.

*Example: Find an opportunity to present my project idea to a large group of people like a related club meeting, student volunteer fair, service learning fair, etc.*

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# Step 3: Communicate

Communication is key. As you plan your project, it’s important to create a communication strategy. Communication helps keep people informed of your project activities and impact and can also help to gain support for your project from administration or community groups. Communication is also important for keeping your team updated on progress and next steps. **Think through some initial communication needs for your project and remember, like many other areas of your project plan, this is a list you will likely need to continue to revise and add to over the course of your project.**

*\*Remember to check out the “Communicate” phase resources provided in the EcoLeader Project Planning Library to help you in this third step of planning the communication needs and strategies for your project as well as throughout the lifecycle of your project:* [*http://www.nwfecoleaders.org/project-communicate-resources*](http://www.nwfecoleaders.org/project-communicate-resources)

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| **Communication Need** | **Audience** | **Communication Method** | **Timeframe** |
| *Example: Social media presence* | *Student and campus community* | *University social media handles* | *Throughout the school year* |
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**Marketing**

Another form of communication is marketing. Marketing your project can help you gain support through volunteers, financial resources, donations, and more. And the more people that know about your project, the more people will care and want to get involved. Telling the story of your project, its goals and its impacts, helps people understand why your project is important, and why it needs support. **Brainstorm some initial marketing ideas for your project:**

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| --- | --- | --- | --- |
| **Marketing Need** | **Audience** | **Method** | **Timeframe** |
| *Example: Volunteer recruitment* | *Students and campus community members* | *Postering* | *Once garden build is approved*  |
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**How will you measure impact and evaluate your project?**

Why set goals if you aren’t going to track progress and evaluate your results? Tracking your goals and measuring your impact will help you determine if you did what you set out to do. And if your results aren’t what you expected, then you can evaluate your goals, your results, and your implementation strategies and develop a plan to move forward. Reporting helps you document your project activities and keep your project team and interested parties updated**. Copy your goals from the “Goal Setting” section, and think through some initial ways that you will measure the impact of your project and remember to keep in mind the SMART goals you set earlier in the planning process.**

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| **Short-term Goal** | **Methods for monitoring and evaluation** |
| *Example (from goal section): Gain proper approval from university to build a community garden on campus by and assemble a team of at least 10 volunteers who are committed to help by the end of the first term of the 2019/20 school year* | * *Formal approval from necessary university leadership*
* *Volunteer sign up and tracking lists*
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| **Mid-term Goal** |  |
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| **Long-term Goal** |  |
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# Step 4: Sustain

Once you’ve launched a successful project it’s important to plan to take time to celebrate your successes and recognize the people who helped in the process. Reflect on the lessons you learned and how you might improve moving forward. Your project may have been a one-time action or event, but could it be more? Develop a plan for the future and incorporate strategies to ensure your project is sustainable and has the necessary resources and support to stay active even beyond your leadership. Plan to meet with your project team and any people or groups that might be interested to explore options to maintain the project.

*\*Remember to check out the “Sustain” phase resources provided in the EcoLeader Project Planning Library to help you in this final step of your project planning as well as throughout the lifecycle of your project:* [*http://www.nwfecoleaders.org/project-sustain-resources*](http://www.nwfecoleaders.org/project-sustain-resources)

**Cultivating Energy and Renewal**

Cultivating energy for yourself and your project team is essential. You and your team members will likely be participating in your project above and beyond other job or school duties so it will be important to keep them energized, and reassert why they are so important to the team and success of the project. It will also be important to ensure that your project meetings and activities have continuous energy. **Brainstorm strategies that you can use to make sure you and your team aren’t overwhelmed and can have the energy to see the project through to its end goal:**

*Example: Determine amount of volunteers needed for all elements of the project and a try to recruit a few extras to account for volunteers who aren’t able to stay the course of the project*

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**Fostering Reflection and Continuous Improvement**

Once your project is coming to a close and you are developing future plans, it’s important to reflect on what worked well and identify the challenges you faced. Develop a lessons-learned document to share with the project team and discuss what could have been done differently, and how. Use this document as a reference to ensure continuous improvement as you move forward.

**Celebrating and Recognizing**

After you have reached your project goal (fingers crossed!) and all the hard work of planning and implementing is behind you, it will be time to celebrate your success and recognize your project team and the positive impacts you have made. Celebrating and recognizing is an important part of the project as it not only forces you to stop and really think about what you have accomplished, but it’s also a way to share your accomplishments with the broader community and gain support as the project moves forward. Also, it’s important to celebrate and recognize your project team and other supporters - your project would not have been successful without them! **Brainstorm some ways you will celebrate your project’s success and recognize the people who helped you along the way:**

*Example: Host a garden party for volunteers and garden supporters and enjoy the fruits of the labor (literally!)* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Create your master project management plan**

Now that you’ve thought through and brainstormed ideas for each phase and element of your project, we recommend that you pull all of these action items into a master project management plan (often referred to as a PMP) to track all of your project actions in one place. There are many different types of tools and templates available for project management plans and we encourage you to find one that best fits your needs. **We’ve created a simple, customizable spreadsheet PMP template that you can download in the EcoLeaders Project Resource Library:** [**http://www.nwfecoleaders.org/project-do-resources**](http://www.nwfecoleaders.org/project-do-resources)