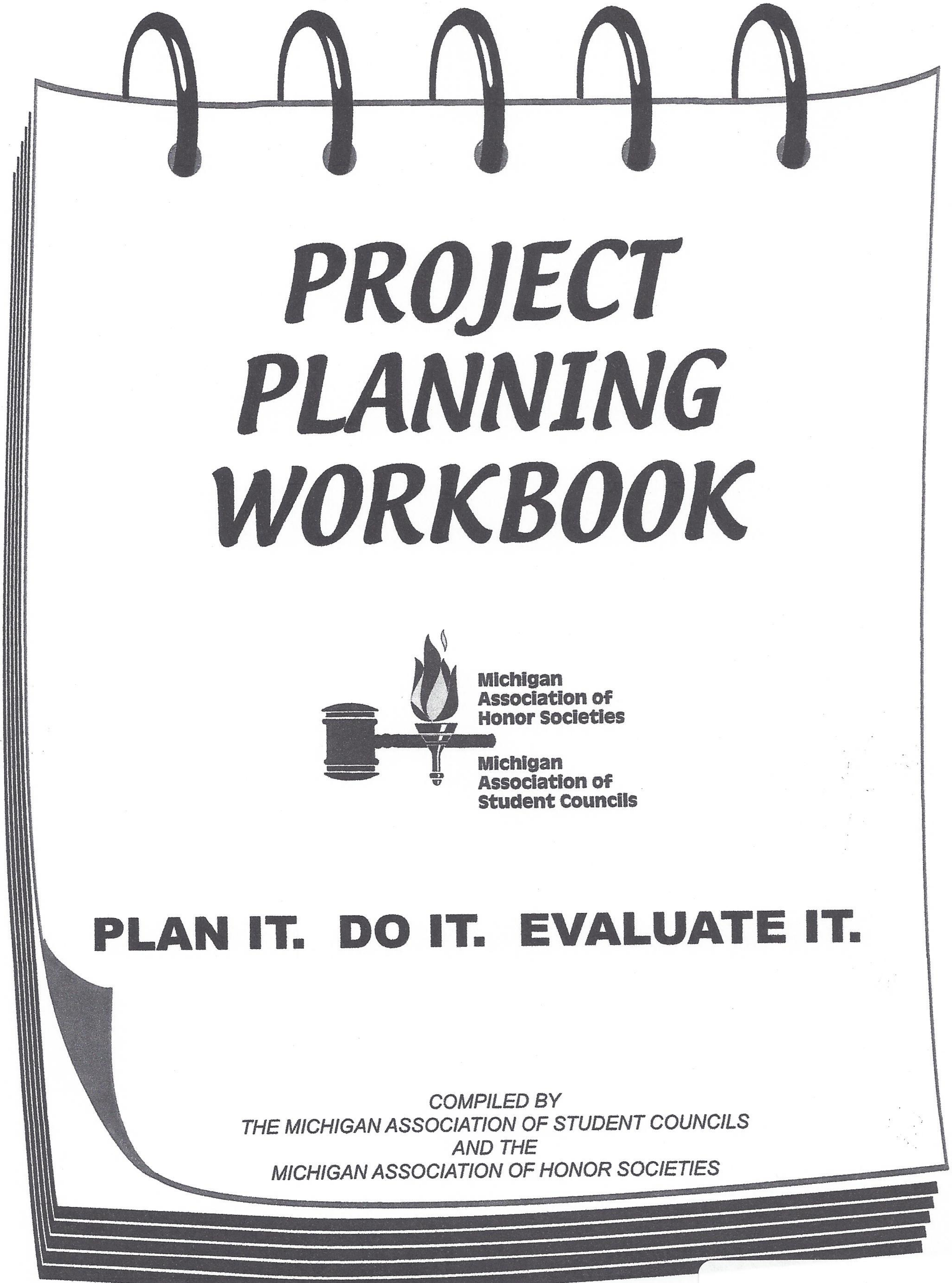


PROJECT PLANNING WORKBOOK

Michigan Association of Honor Societies

Michigan Association of Student Councils

PLAN IT. DO IT. EVALUATE IT.

COMPILED BY
THE MICHIGAN ASSOCIATION OF STUDENT COUNCILS
AND THE
MICHIGAN ASSOCIATION OF HONOR SOCIETIES

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

PLANNING

Four Basic Components of Planning:

1. What is to be done?
2. Who is responsible for doing it?
3. When is it to be done?
4. Why are we doing this?

IF YOU FAIL TO PLAN,
YOU PLAN TO FAIL.

Planning is...
...a process or framework for making decisions.
...dealing with the future.
...filtering through and evaluating alternative actions, then choos→ing the best option.
...the process of sequencing or scheduling.
...a blue print for the future
...planning for change.
...outlining the steps necessary to arrive at the desired change.

"You Can Do Anything You Want..."

by B. Philka

You can do anything you want - as long as it's WELL PLANNED, WELL ORGANIZED, and ISN'T HURTFUL OR HARMFUL.

WELL PLANNED

Goal Setting - A goal is stated simply and understandable, in one or two sentences and is attainable, moderately difficult, and measurable.

Problem Identification and Solution: Potential road blocks are dealt with and resolved in a pro-active mannre.

List of Responsibilities: All responsibilities for implementation, no matter how minor, are brainstormed and put on a written list.

Division of Responsibilities: The list of responsibilities are grouped by similarity and committees; chairpersons ar e assigned accordingly.

Time-Line: The time line includes due datse for the listed responsibilityes and regularly schedules "checkpoint" meetings.

Budget: Budgeting includes income, expeneses, and follows school monetary procedures.

Communications: Communication is written adn oral, formal and informal, from posters to announcements and letters to word-of-mouth.

Evaluation: Points out succes and suggestions for the future; possible improvements are listed.

Follow-up Report: A written report, detailing all of the above points, is completed and placed a file for that specific event.

WELL ORGANIZED

Team-work: A representative groups is involved in project development.

Accountability: Specific students have responsibility for their part of the project. A list of these individuals is written and distributed to all involved.

Inclusion: Attention is given to allow all students who wish to be involved in the opportunity to do so.

Documentation: Agendas, minutes, committee lists, contact names, addresses, phone numbers, etc...are all in writing and saved for the final report.

ISN'T HURTFUL OR HARMFUL

The Human Factor: Includes students, faculty, administration, secretaries, custodians, and community members.

The Curricular Factor: Compliments, not detracts, from the educational goals of the school.

The Institutional Factor: Doesn't burn down, blow up, or otherwise harm the building, the campus, or the activity location.

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

8 STEPS TO GROUP SUCCESS

1. Seat the group in a way that best accomodates your group size, meeting format, and room set-up.

2. Break the ice! Pick an energizer, warm-up, or icebreaker that fits your group's comfort level.

3. Set the goal for the meeting. Know what needs to be done and have an agenda.

4. Talk about it. Moderate who talks when and for how long, encourage everyone to share ideas, keep notes of everything that is said, and most important, really LISTEN!

5. Make 'em heard! When making a decision, some sort of voting or consensus overview will help group members be "heard". Do some sort of voting procedure such as "Fist to Five", majority vote, or anonymous ballot vote.

6. Put it all together - lay it all out. Put the information where people can see it. Use the 11 W's of Project Planning to cover the bases, a Duty List to show everyone what they're responsible for, and a calendar to see your time frames.

7. Get busy! Keep an active log of what each person is doing, what their progress is, what results are, comments on the item, etc... Always show strong support for the group process.

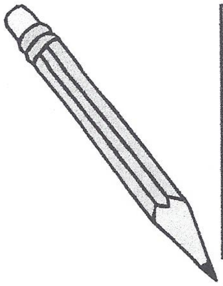
8. Report Card time?! At the end of the project, the most effective way to improve it is to evaluate it as soon as it's over. See what went right, what went wrong, why they went that way, and possible ways to fix or improve items. Evaluate the actual event and the process.

The 12 W's of Project Planning

WHAT are you planning to do?
WHY do you want to do this project?
WHEN will the event occur?
WHERE will the activity take place?
WHO will benefit from the project?
WHAT staff member(s) will need to approve this?
WHAT funds are needed?
WHEN will the basic planning be done?
WHAT committees are necessary?
WHAT type of publicity is needed?
WHO deserves a special thank-you?
WAS the project worthwhile?

Source: MASC/MAHS Adviser
Academy Handbook
MASC/MAHS, 2012

Project Proposal/Outline



Project: ____________________

Project Date: ____________________

Puprose of Project: ____________________

____

Proposal submitted by: ____________________ **Submission Date:** ____________________

• •

Description of Project: ____________________

____

____

____

____

Resources Needed:

People	Time	Materials
Advertising	**Budget**	

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

Overview of Timeline:

Action	Date:

Proposal Review:

☐ **STOP! No need to plan further; project not approved.**

☐ **TELL MORE – need more details to make a decision.**

☐ **QUESTIONS – sounds good, but there's some things that need clarification.**

☐ **GO FOR IT! Project approved; continue with further planning.**

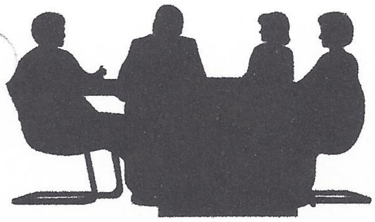
Reviewer: ____________________

Project Preparation Sheet

Use this worksheet to list all items, people, tasks, and resources that will be needed for the successfull completion of the activity. From this, you can organize the items into the Project Worksheet.

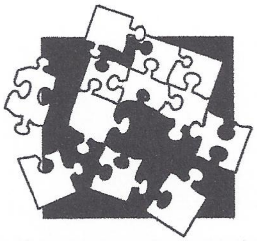
Project/Event: ______________________________ **Date of Project/Event:** __________

Source: MASC/MAHS Adviser
Academy Handbook
MASC/MAHS, 2012



Include on this sheet every detail needed to successfully complete this project/event. All dates and committess will be added on the next worksheet. Never assume that something will get done – DOCUMENT AND ASSIGN EVERYTHING!

Project Worksheet



Project/Event: ________________________________

Date of Project/Event: ________________

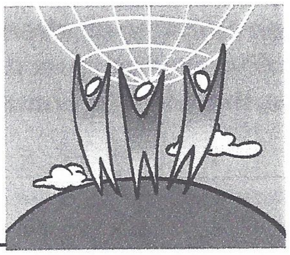
Task	Assigned to	Due by	Comments

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

Committee Project Planning Sheet

Project/Event: ______________________________

Date of Project/Event: ________________



Committee: ______________________________

Chairperson: ______________________________

Co-Chairperson: ______________________________

Tasks Responsible For	Committee Member:	Date Completed

Additional Preparations/Notes:

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

Chairperson: Attach a list of committee members to this Planning Sheet

Project Planning Calendar

When planning an event, mark on this calendar the date of your event in the LAST WEEK of the 2 months on whichever day it falls. From that point, work BACKWARDS and fill in the due dates of all tasks that must be completed.

Project/Event: **Date:**

Month:

Su	M	T	W	Th	F	Sa

Month:

Su	M	T	W	Th	F	Sa

Source: MASC/MAHS Adviser
Academy Handbook
MASC/MAHS, 2012

Project Review

Project/Event: ______________________________

Date of Project/Event: ____________________

Evaluation submitted by: ______________________________ Date: __________

Overall rating of project (1-terrible to 10-superb): _____

Please attach to this review form a copy of all Project Planning documents, other related documents, and committee reports and evaluations as well.

List the most important tasks for this project and the date they were due. In the third column, put any comments about the timliness of this task, if the time frame was acceptable, how well it was completed, etc...

Task	Date Due	Comments

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

Three most positive things about this project:

1.
2.
3.

Three things to improve/change for this project:

1.
2.
3.

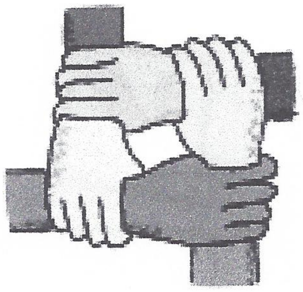
If evaluations of this event were collected, attach a summary of them to this review sheet.

On the backside of this review sheet, give two obstacles encountered during the planning process and/or the actual project, list how the obstacles were overcome, and give 2 alternate ways (for each one) to overcome the problem or to avoid that situation next time.

Committee Project Review

Project/Event: ______________________________

Date of Project/Event: ________________



Committee: ______________________________

Chairperson: ______________________________

Co-Chairperson: ______________________________

Complete the following evaluation as a committee. When submitting the evaluation to the Project Chairperson, include all committee work, materials, documentation, budget sheets, and evaluations. If you conducted a survey/evaluation of any additional people NOT in your committee, submit copies of the actual surveys/evaluations as well.

What part did your committee play in the above project? List specific responsibilities that your group had prior to, during, and after the event.

What would you keep the same about this project? What worked well?

What would you remove completely from this project?

What would you change about this project (keep item/task/event, and make alterations to it)?

What new ideas do you have for this project?

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

Please rate this event on a 1 – 10 scale, with 1 being low and 10 being high.

Positive atmosphere _____
Promotes teamwork _____
Benefits those involved _____
Organized _____
Effective _____
OVERALL _____

Notes

Source: MASC/MAHS Adviser Academy Handbook
MASC/MAHS, 2012

Project Planning Guide

Name of Project: ______________________ Proposed Date and Time: ______________

Objectives/Goals:

A. Why are we doing this project?

1. ______________________________
2. ______________________________
3. ______________________________

B. Who will benefit from this project?

1. ______________________________
2. ______________________________
3. ______________________________

C. Support. Ask the groups who will benefit from your project to pledge their support.

Needs/Tasks

A. Fact Finding. How can your group find out more about the project—its possible good and bad points—in order to be prepared?

1. ______________________________
2. ______________________________
3. ______________________________

B. Approval. Whose approval do you need to conduct the project?

Approval Needed?	Deadline	Person Assigned	Okay?
Principal			
Adviser			
Executive Committee			
General Assembly			
Student Body			
Other			

C. Resources. What resources will be needed for this project?

Resources Needed	Where to Locate	Person to Obtain	Okay?
1.			
2.			
3.			
4.			
5.			

Source: Nat'l Assoc. of Student
Councils -Officer Guides
NASSP, 2006

D. Budget. This must be clearly planned and itemized.

Item to be Purchased	Anticipated Cost	Deadline	Buyer	Amount Paid
1.				
2.				
3.				
4.				
5.				

E. Publicity. What types of publicity do you need? What will be most suitable to the project and the audience?

Item	Person Responsible	Deadline
Handouts		
P.A. Announcements		
Bulletin Boards/Website		
Newspaper Articles		
Mass Media (radio, TV)		
Other (be creative!)		

Source: Nat'l Assoc. of Student
Councils -Officer Guides
NASSP, 2006

Project Evaluation

Attach any related information information to this report, such as planning sheets, copies of purchase orders, etc.

Project: ______________________________ Date: ____________

Evaluation completed by: ______________________________

Project Chairperson: ______________________________

How would you rate this project?	☐ outstanding	☐ good	☐ needs improvement
How would you the students rate this project?	☐ outstanding	☐ good	☐ needs improvement
How would the faculty rate this project?	☐ outstanding	☐ good	☐ needs improvement

List all the things about your project you would do again.

List all the things about your project that should be changed next year.

List any special recommendations or ideas for next year's committee.

List all the people, businesses, or groups that should be thanked for their part in this project.

Source: Nat'l Assoc. of Student Councils -Officer Guides
NASSP, 2006

Project Task Assignment List

Activity: ______________________________ Date of Activity: ______________

TASK TO BE COMPLETED	PERSON RESPONSIBLE	DATE TO BE COMPLETED	COMMENTS

Source: Nat'l Assoc. of Student
Councils -Officer Guides
NASSP, 2006

Action Plan for Success

These are the basic steps committees should follow for success. Include them in your action plan.

Discuss.	Include input from as many people as possible.
Decide.	Determine what activities your committee will undertake.
Plan.	Develop ways to achieve the goals for each part of the project. Put them in writing.
Schedule.	Determine a timeline for work, meetings, people, and resources.
Contact.	Contact everyone needed to complete the plan, such as a speaker, a DJ, the principal, or a vendor.
Confirm.	Follow through with contacts and members working on project.
Check Details.	Go through the plan and make sure all details are covered and confirmed.
Deadline.	Meet each deadline for completion of work.
Follow up.	Clean up, evaluate, send a thank-you as necessary.

Source: Nat'l Assoc. of Student
Councils -Officer Guides
NASSP, 2006

Activity Planning Sheet

Today's Date: ____________________

Type of Activity: ____________________ Sponsor: ____________________

Name or theme of event: ____________________

Name of person in charge: ____________________ Home phone: ____________________

Date of event: ____________________ Time: ____________________

Location of event: ____________________

Who is the event for: ____________________

Budgeted amount for publicity: ____________________ Methods of publicity: ____________________

Frequency of event: ☐ daily ☐ weekly ☐ biweekly ☐ monthly ☐ quarterly ☐ semiannually ☐ annually

Will tickets be needed? ____________________ When? ____________________

Ticket price: ____________________

Ticket outlet locations: ____________________

When? ____________________

Ticket sale deadline: ____________________

Seating arrangements: ____________________

Parking arrangements: ____________________

Dress: ____________________ Refreshments: ____________________

When should publicity begin: ____________________

Kinds of publicity: ____________________

☐ Newspaper ☐ Radio ☐ TV ☐ Hour Magazine ☐ Flyers ☐ Banners ☐ Billboards

Special Other Ways: ____________________

Printed programs: ☐ Yes ☐ No When? ____________________

Who is doing this? ____________________

Information for the program:

____________________ ____________________

____________________ ____________________

Special theme/logo/colors that should be used with publicity: ____________________

____

Information about performing group, special guests, or speakers: ____________________

____

News Pegs: ____________________

____

Additional information, ideas, or suggestions: ____________________

____

Report Submitted By: ____________________

To: ____________________

Source: Meetings That Matter ! For Student Leaders and Advisors , NASSP, 1993

ACTIVITY PLANNING SHEET

Today's Date:

Type of Activity: ____________________

Sponsor: ____________________

Name or theme of event: ____________________

Name of person in charge: ____________________ Home phone: ____________________

Date of event: ____________________ Time: ____________________

Location of event: ____________________

Who is the event for? ____________________

Budgeted amount for publicity: ____________________

Methods of publicity: ____________________

Frequency of event: ☐ daily ☐ weekly ☐ biweekly ☐ monthly ☐ quarterly ☐ annually

Will tickets be needed? ____________________ When? ____________________

Ticket price: ____________________

Ticket outlet locations: ____________________

When? ____________________

Ticket sale deadline: ____________________

Seating arrangements: ____________________

Parking arrangements: ____________________

Dress: ____________________

Refreshments: ____________________

When should publicity begin? ____________________

Kinds of publicity: ____________________

☐ Newspaper ☐ Radio ☐ TV ☐ Magazine ☐ Flyers ☐ Banners ☐ Billboards

Other: ____________________

Printed programs: ___Yes ___No When? ____________________

Who is doing this? ____________________

Information for the program: ____________________

____

Special theme/logo/colors that should be used with publicity: ____________________

____

Information about performing group, special guests, or speakers: ____________________

News Elements: ____________________

Additional information, ideas, or suggestions: ____________________

____

Report Submitted By: ____________________

To: ____________________

Source: Meetings That Matter - Revised Edition, NASSP, 2007

7.6 ACTIVITY PLANNING GUIDES

Planning any activity requires careful thought and preparation. Before stepping into action, be sure that you can answer the following questions:

1. What are you planning to do?
2. Why do you want to do this project?
3. When and where will the activity take place?
4. Who will benefit from the project?
5. Which staff members will need to approve the project?
6. What funds are needed?
7. When will the basic planning be done?
8. What committees are necessary?
9. What kind of publicity is needed?
10. Who deserves a special thank you?
11. Was the project worthwhile?
12. What's next? Where do we go from here?

Source: Meetings That Matter - Revised Edition, NASSP, 2007