

# **VISIONING & CALENDARS**

**PROJECT MANAGEMENT BASICS  
WITH JENNIFER NEW**

# WHAT IS A PROJECT AND WHY DO ONE?

*“An individual or collaborative enterprise that is carefully planned and designed to achieve a particular aim.” – Webster’s*

- Projects are about change – changing viewpoints, bringing in new voices, disrupting the way things are.
- Projects support the work of the whole through a burst of energy, creativity, and active engagement with change.
- Projects expand awareness and participation around a topic, extending an organization into other communities and partnerships.

# THE PROJECT PROCESS

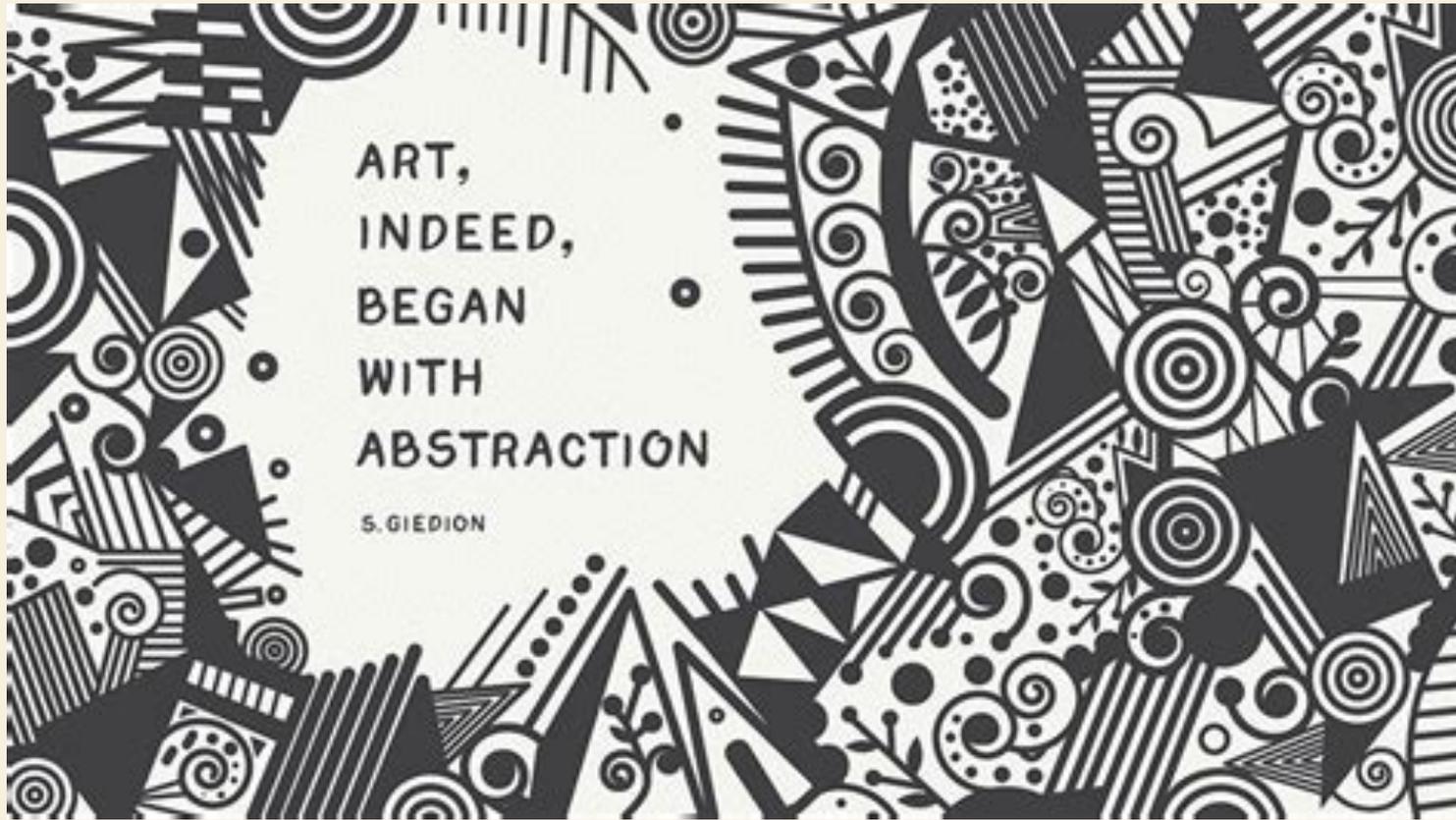
**What are the goals of this project?**

**How does this project fit into what our organization or my self is trying to accomplish and our/my mission, both immediately and in the long run?**

**What will happen as a result of this project – for the organization, self, community/others? What won't happen if we/I don't do it; would there be a missed opportunity? Will it allow for more time for something else?**

**What needs to be in place in order to make this successful, e.g., personnel time, money, space? Can we/I do this with the capacity we/I have or would we/I need to make adjustments to our work time and budget?**

# EXERCISE: VISIONING



# TURN & TALK

Explain your idea using your short language. Is your idea clear to an outsider? Do you need to edit out jargon?

- Who is needed to make this project a success?
- What is “success”?
- Who creates it? Who is in the room? Who promotes it? Who holds the space for others? Who evaluates? Who pays the bills? Who keeps the idea afloat?

## AFTER THE WHAT: THE WHO

Whoever comes are the right people.

Whatever happens is the only thing that could have.

Whenever it starts is the right time.

When it's over, it's over.

# REFLECTION

- Rewrite the project and its purpose multiple times. Imagine different audiences for each one. Try to draw it. Try to act it out like a charades game. If the project were a movie, what would it be? Playfully, keep coming at it from different directions. Pause. Return to it. See if you can write an even more finessed version.
- What are the most essential ingredients for this project – the people or other elements without which this won't be vital or possible?
- What aspects of the project do you still feel the most fuzzy about? Who could help you find clarity?

# PARTICIPANTS

On p. 2, respond to the question about “success” and then complete the “stakeholders” section of page 2.

Return to p. 1 and make a diagram of participants. These could be specific people’s names or roles.

# START AT THE END



# BACKWARDS PLANNING WORKS FOR TEAMS AND SOLO PROJECTS

- **Start at the end:** What's the end result? What is "success"? When is this happening? What needs to happen to get there?
- **Circle team members and provide a draft overview and calendar.** Be conscientious of who needs to be in the room. Start with a core and move out. Or get buy in from larger group and then create core.
- Agree on a week-by-week, month-by-month **timeline**; be realistic about capacity.
- If something of this scope is unfamiliar to you, **talk to others** who have planned something similar and ask them for advice on planning.
- Be sure you **know due dates and turn around** for things outside of your control, e.g., when are catering orders due? How long will printing take? When are ads due?

# **EXAMPLE: OBERMANN CONVERSATION**



# STEPS FOR SIMPLE ONE-TIME EVENT

## **Getting Started – Several months in advance**

- Float topic idea to potential participant(s); add participant based on that conversation
- Narrow topic and identify specific questions with participants
- Establish time and place
- Book room
- Get on calendars – Obermann's, co-workers, speakers, space

## **Mid-Point – 1-2 months in advance**

- Get bios and headshots from participants
- Develop communications: poster, digital signs, calendars, Little Village ad; distribute communications
- Covering event – photographer? Video?

## **Week of**

- Touch base with speakers
- Materials to distribute at event
- Waters for speakers
- Sign up sheet

# THUMBNAIL EXAMPLE OF SYMPOSIUM / EARLY

Content	Budget	Communications	Space
Write up accessible summary.	Do you have an established amount? Do you need more? If so, set up fundraising plan.	Establish look and feel of event.	Brainstorm the kinds of spaces needed for the event. Consider accessibility, movement, public v. campus.
Identify and secure speakers.	With the \$ you know you have, establish what you can afford by category, e.g., honorarium, travel, catering.	Develop web site	Identify potential spaces and costs. Begin to reach out to them.
Brainstorm modes of exploring the topic, e.g., films, performances, hands-on activities; communicate with possible local partners.	Continue to adjust as you raise money and spend money.	Start to seed interest ~9 months ahead of time; continue to amp up coverage.	Does the space have the tech you need? Enough seating?

# THUMBNAIL EXAMPLE OF SYMPOSIUM / MID

Content	Budget	Communications	Space
Plan smaller sub-events, such as a book group or an Obermann Conversation, that will raise awareness.	Establish all travel plans, including flights and hotels, and track \$\$.	Poster design and printing. Web site tweaking. Social Media presence.	Do a walk through of the space and note anything needed that isn't already there.
Invite moderators, colleagues, classes, and dignitaries.	Seek smaller pockets of funding if budget is not on track.	Develop list of poster recipients, especially off campus; other ways to communicate off campus? Op-eds, short promo videos?	
Get all titles secured; work on program content.	Continue to adjust as you raise money and spend money.	Develop series of short articles and press releases for various formats/audiences.	

# THUMBNAIL EXAMPLE OF SYMPOSIUM / FINAL

Content	Budget	Communications	Space
Final communications with speakers to ensure clarity of their needs, symposia's needs, e.g., format, introductions if they'll be participating with another speaker.	Make sure you have a clear method for retaining receipts accrued during event, including from participants.	Final communications pieces for conference: programs are printed and in hand; nametags; table tents; maps; welcome packets.	Take any supplies over ahead of time, including an ER box with tape, scissors, blank pads.
Make sure moderators have all essential information, including speakers' bios, time and place.		Final marketing: Social media, personal emails.	Be clear on clean up at each space.
Have follow up/evaluation already planned and ready.		Take photos, get headcounts.	Final tech walk through and backup plan.

	EARLY	MID	FINAL
<b>CONTENT</b>			
<b>BUDGET</b>			
<b>COMMUNICATIONS (w/ participants, with public)</b>			
<b>SPACE (tech, accessibility, food, signage)</b>			