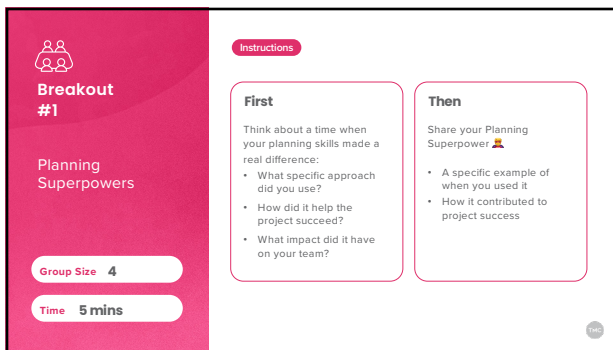
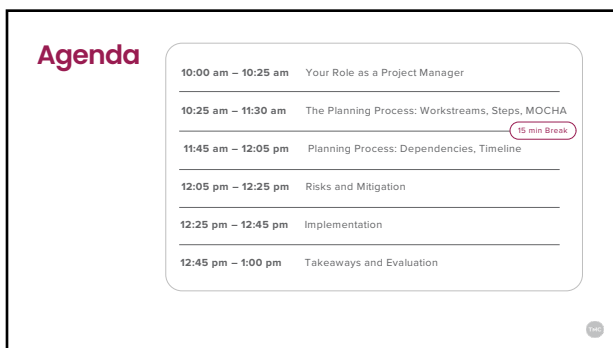


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5



6

Effective Management: Three Dimensions



7

Getting Aligned




8

Aligning on Expectations

- WHAT?** What does success look like?
- WHEN?** When is the project due?
- WHERE?** Where else can you go for resources?
- WHY?** Why is this project important?
- WHO?** Who should be involved?


9



Practice Activity
#1

Your Project

Time 2 mins



10

The Planning Process

Six Steps

- 1 Defining Workstreams
- 2 Breaking Down Steps
- 3 Assigning Roles Through MOCHA
- 4 Mapping Dependencies
- 5 Writing a Timeline
- 6 Assessing Risks and Planning Mitigations

11

Case

The Context

CARE: A statewide non-profit whose mission is to strengthen workforce development opportunities for youth

The state recently introduced new workforce development policies directly affecting how youth can access apprenticeships, training, and career programs. Many educators and caregivers are unclear about what these changes mean for their students and families. CARE's network has asked them to prioritize:

- Providing clear, accessible information about youth rights under the new policies.
- Equipping trusted adults with the tools to guide young people toward workforce opportunities.

CARE is now focused on both priorities.



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The Planning Process

Six Steps

1

Defining Workstreams

2

Breaking Down Steps

3

Assigning Roles Through MOCHA

4

Mapping Dependencies

5

Writing a Timeline

6

Assessing Risks and Planning Mitigations

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Workstreams and Steps

Key Idea

We've aligned on expectations through our 5Ws. Now comes the key question: How do we organize all this work? We do this by identifying workstreams and steps.

The diagram illustrates the relationship between Workstreams, Dependencies, and Steps. It shows a 'WORKSTREAM' column on the left, a 'DEPENDENCY' column in the middle, and a 'STEP' column on the right. Arrows indicate dependencies between steps within a workstream and between different workstreams.

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Workstreams and Steps

Workstreams

The major categories of work required to complete your project. Each workstream represents a key area of activity needed to achieve your goal.

Steps

Key activities needed to complete a workstream. Each step represents significant progress toward the workstream's goal.

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KNOW YOUR RIGHTS

What are the major workstreams needed to deliver these sessions successfully?

Program Design (content, materials, agenda)

Logistics (venue, tech, set-up)

Communications (marketing, branding)

Community Engagement (coalition building)

16

KNOW YOUR RIGHTS

What steps might we need to support this workstream?

Logistics (venue, tech, set-up)

Research venues

Create selection criteria

Compare options

Book venue

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Padlet #1

What steps would help the project team meet the goals of the workstreams?

Time 3 mins

Planning Projects: Steps KYR Campaign

What steps might we need to support the workstream?


Logistics

Program Design

Comms

Community Engagement

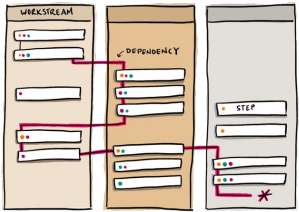
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Practice Activity #2

Workstreams and Steps

Time 3 mins




20

Assigning Roles Through MOCHA

Key Idea

Now that we have our workstreams, we need to identify who can help with each workstream.



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Project Management

Getting outstanding results with, through, and for other people.

Those people are stakeholders.

The people who determine the success or failure of the project

Have ideas, experience, and resources

Take on specific deliverables for the project

Give final sign-off

Will be impacted by project results

22

A grande MOCHA, extra hot

HELLO
MANAGER

Assigns work to the owner, holds accountable and supports

HELLO
Owner

This is the **project manager**, responsible for the project

HELLO
CONSULTED

Should be kept in the loop, or asked for advice or input


HELLO
HELPER

Will help do a part of the work

HELLO
APPROVER

Has final sign-off or approval on parts of the project

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Practice Activity #3

Stakeholders and
MOCHA

Time 2 mins

HELLO
MANAGER

HELLO
Owner

HELLO
CONSULTED

HELLO
HELPER

HELLO
APPROVER

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KNOW YOUR RIGHTS

MOCHA

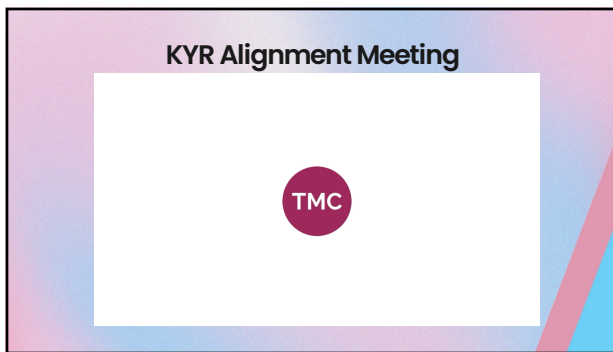
Manager	Andrew (Janelle's Manager)
Owner (PM)	Janelle
Consulted	Gail (video)
Helpers	Kyung-Hu (Communications & Marketing) Sam (Programming) Marielena (Logistics)
Approver	Chloe (Marcomm & Budget)

Manager	Janelle (Project Manager)
Owner (PM)	Kyung-Hu (Comms and Marketing)
Consulted	Sam (Programming) Andrew
Helpers	Didra (Social Media)
Approver	Janelle

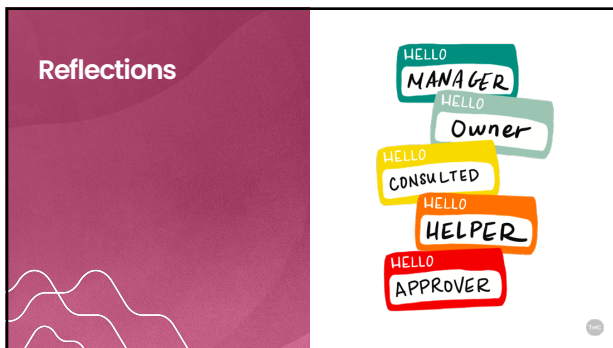
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27




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Reflection

Which concept would you most like to review before moving forward?



- A. Getting stakeholder alignment
- B. Breaking down workstreams
- C. Clarifying roles with MOCHA
- D. Creating Cascading MOCHAs

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The Planning Process

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Dependencies

Key Idea

Project steps often have dependencies on other workstreams. During this step, the project manager analyzes the sequence of tasks, considering cause and effect relationships and identifying which activities must be completed before others can begin.

Workstream: Logistics

Marielena is responsible for helping with event venues and coordination.

- Step 1: Research venues (depends on budget)
- Step 2: Create selection criteria
- Step 3: Schedule visits
- Step 4: Compare options
- Step 5: Book venue (depends on how many participants we expect)
- Step 6: Plan setup and support needs (depends on program agenda)

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The Planning Process

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Timelines

Key Idea

Now that we understand our steps and dependencies, let's organize them in time. Some steps can happen simultaneously, others need to happen in sequence - like a relay race.

KNOW YOUR RIGHTS

Must Happen First (Early Phase)
Research venue options

Can Happen in Parallel
While visiting venues → start drafting catering requirements

Must Wait (Later Phase)
Book venue and sign contract (needs budget approval)

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Practice Activity #4

Dependencies and Timeline


Time 4 mins

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Sustainable Project Management



Timeline Collaboratively: Gather all Helpers from your MOCHA to map out their steps and get input from the team.



Include Review Time: Account for Approvers' review periods and stakeholder feedback cycles.



Add Buffer Time: Build in extra space - projects rarely go exactly as planned.

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The Planning Process

Six Steps

1

Defining Workstreams

2

Breaking Down Steps

3

Assigning Roles Through MOCHA

4

Mapping Dependencies


5

Writing a Timeline

6

Assessing Risks and Planning Mitigations

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Breakout
2

Project Reflection

Group Size 3

Time 5 mins

Instructions

What does success look like for your project?

What concerns you most about bringing this project plan to life?

In other words, what might go wrong with your plan?

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Identifying Risks: 3 Ways

Engage your MOCHA
Together imagine possible project risks – list as many as you can.
If X happened, Y would happen.

Narrow your list
Star the likeliest or biggest risks.

Mitigation
Identify preventative and real time mitigations.

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Implementation

Key Idea

In project management, success isn't just about having a perfect plan - it's about skillfully navigating the realities of execution.

Making Trade-Offs Visible

Project Status Meetings

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Making Trade-Offs Visible

Option 1	Option 2
Actual Potential Upsides	Actual Potential Upsides
Downsides, costs, risks	Downsides, costs, risks

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Making Trade-Offs Visible

Potential Risk

The Communications Team at CARE is currently at capacity running another campaign.

The team cannot send event registration emails on time.

1

Delay sessions by 2 weeks

2

Comms Team can properly support and maintain professional quality of invites

3

Loss of momentum

4

Use basic email template w/o Comms Team

5

Keep original timeline; maintain momentum

6

Less polished appearance; might miss key messaging

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Project Meeting Agenda Sample

Report on last week's commitments

Stream	Current Status	Action
Recruitment	Recruitment materials not yet drafted (RP and ask last week) research support of design	Off track
Content	Research brief is done, vetted by Christ and Lee	On track
Session Design	Finalized content of qualitative needs and priorities. They strongly align with the policy team's research	On track

Project Manager Updates

- 11 meetings with key community leaders are coming up - should boost recruitment

Clear Roadblocks

- Missings: Recruitment will shorten the review timeline for draft materials, need all approvals to turn it around on 10/20 to stay on track. Who needs to approve? Calendar of
- Discussion Items: If we can't find a suitable venue space on the West side, should we relocate to a different community or compromise on our venue size?

Share Success and Learning

Stream	Success	Learning
Recruitment	Community members' appreciation of invitation for 1/16	Need to move working time to allow for unexpected absences
Content		
Session Design		

Review Upcoming Deadlines of Project Plan

- Find recruitment messaging going out next week
- Know how things connect and bring going drafts later this week

Make New Commitments

Stream	New Commitment
Recruitment	Get final round of recruitment emails out on time
Content	Review session outline and talking points and share feedback
Session Design	Share about early ideas about materials with policy lead review outline

Progress to Goal: Workstreams and Steps

Project Updates

Roadblocks and Challenges

Upcoming Deadlines

New Commitments and Next Steps

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Practice Activity #5

Write a brief celebration of your project's success.

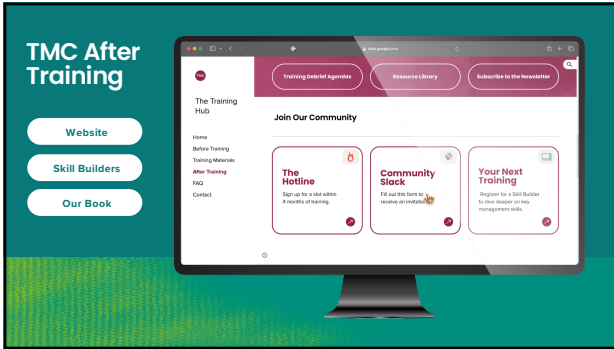
Time 4 mins

The illustration shows a vibrant landscape with a sun, mountains, and a winding path. A banner draped across the path features the words 'EQUITABLE', 'RESULTS-DRIVEN', and 'SUSTAINABLE' in a stylized font.

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