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**Planning Projects**

**The Practice Workbook**

*Roberts Enterprise Development Fund (REDF)*

[**\*\*\*To get your own editable copy of this workbook, click here.\*\*\***](https://docs.google.com/document/d/1M84SqM-SGU21WRtB3XIEPU3tf8gIglT41cktN4ltHig/copy)

| **🎯 Today’s Goals**  This training equips project managers with tools and strategies for transforming project visions into actionable plans while fostering equity and inclusion. Through practice with both a case study and your own project, you’ll learn to break down complex work, assign clear roles using MOCHA, anticipate and address challenges along the way. |
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| **By the end of our time together, we hope you:**   * Understand how to transform project visions into actionable plans by ‘conspiring and aligning’ with project contributors and stakeholders. * Feel comfortable applying the following project management tools and frameworks: MOCHA for role clarity and workstream planning. * Make project decisions that advance equity, maintain team sustainability, and achieve intended results. |

# **💬** Breakout 1: Planning Superpowers

| Instructions  ⏰ 5 mins  💬 Group Size: 4 | | **First:** **Individual Reflection**  Think about a time when your planning skills made a real difference:   * What specific approach did you use? * How did it help the project succeed? * What impact did it have on your team?   **Then: Group Discussion**  Share your *Planning Superpower* 🦸   * A specific example of when you used it * How it contributed to project success |
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| My notes: | | | | | |
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# **✏️** Practice Activities 1-4:Project Planning Template

| We'll use our time together as an actual planning session for your real work.  Download a copy of the Project Planning Template - this will be your working document.  Then, pick a project you want to focus on. It should be something that: Has a clear end goal, clear beginning and end, and involves working with various people (both in and outside your team). | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | |
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# **📄** Case Study:Know Your Rights Campaign



| CARE: A statewide non-profit whose mission is to strengthen workforce development opportunities for youth  **The Context**  The state recently launched new workforce development initiatives focused on apprenticeships and sector-based training programs for young people. CARE’s network of educators and caregivers has asked them to prioritize:   * Coordinating access to career pathways and training programs for youth. * Sharing information about how new policies and funding impact workforce development opportunities across the state.   CARE is now focused on both priorities.  **The Project** In order to share the requested information, CARE will host a series of *Know Your Rights* sessions for educators and caregivers. The Program Team is responsible for:   * Developing the agenda and content for these 1-hour informational sessions. * Delivering the sessions virtually and in-person across the state. * Ensuring educators and caregivers understand the rights, resources, and pathways available to help youth connect with apprenticeships, training, and career opportunities.   Janelle will be project managing this initiative. |
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# **💬** Breakout 2: Project Reflection

| Instructions  ⏰ 5 mins  💬 Group Size: 3 | | **Share:**   1. What workstream are you most concerned about? or more generally what are you concerned about? 2. What could go wrong? (Consider things like stakeholders or timeline) |
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| My notes: | | | | | |
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# **📄** Resource: Project Status Meeting Agenda

| Elements of a Status Meeting | | **Progress to Goal: Workstreams and Steps**  Are we on track to achieve our project goals? What progress have we made on each workstream since our last meeting?  **Project Updates**  What key developments, changes, or achievements should the team know about?  **Roadblocks and Challenges**  What's getting in our way? What support or resources do we need to move forward?  **Upcoming Deadlines**  What important milestones are approaching? Are we prepared to meet them?  **New Commitments and Next Steps**  What actions are we committing to before our next meeting? Who's responsible for what? |
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# **✏️** Practice Activity 5:Final Reflection

| **Imagine your project is complete and was a huge success. Looking back, write a brief celebration of your project addressing:**  **Results:** What impact did you achieve?   |  | | --- |   **Equity:** How did you ensure diverse voices were heard, particularly those most impacted by the project? How did you provide stakeholders with the resources and support they needed to contribute meaningfully?   |  | | --- |   **Sustainability:** How did your timeline and workload planning prevent burnout? What choices did you make to give people the space and time they needed to do quality work?   |  | | --- | | | | | | | | | | | | | | | | | | | | | |
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# **📚** TMC After Training

[Button to access Training Hub](https://sites.google.com/managementcenter.org/training-hub-planning-projects/after-training)

| Tools and concepts we covered today | | |
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| ✅ | The 5Ws |  |
| ✅ | Workstreams |  |
| ✅ | MOCHA |  |
| ✅ | Cascading MOCHA |  |
| ✅ | Steps |  |
| ✅ | Dependencies |  |
| ✅ | Risks |  |
| ✅ | Mitigations (trade-offs) |  |