How-To: Project Development

This How-To document is intended for people who are new to project development so they can get a feel for what's involved. If you're seasoned, you may have your own process.

The stages shown in this document are the main ones we typically use when developing a project:

1. Needs Assessment
2. Project Planning
3. Implementation + Results Assessment

Notes:

- Every project is different and may require different methods. Delivering your intended results, making the project an enjoyable experience for everyone (including yourself), and doing no harm are some of the most important items to accomplish. As long as you do that, you're most likely good to go.

- The stages/steps in this document are also shown online at WAforYou.org: How-To and were created for our team.

Needs Assessment

The first stage in determining whether to go forward with a project is identifying + assessing the needs/opportunities that drive the need for the project. This stage also helps you bring some high-level definition to your project.

1. **Brainstorm a Need/Opportunity**
   The first step involves some exploration and brainstorming on your part. You can think big or small, broad or deep. For example, what's needed in your area? What opportunities present themselves? Gather ideas. Also, YOUR needs are important too: What lights you up? What are your interests + strengths? If you align that with others' needs, you have a much better chance of sustaining your project work.

2. **Identify Who Needs It**
   How will your project improve the lives of people, the condition of the environment, or the lives of wildlife? Or any combination of those? For example, ask people in your area what they need. In this step, identify *exactly* who needs what. Does your project match that? Ask people who work with the environment and wildlife what they think about your project idea—its strengths and weaknesses.

3. **Choose the Key Project Area**
   Which of the key project areas mentioned on the home page of this website does your project fit into? Multiple areas? Do you have knowledge and/or skills in those areas? Do you know people who do? Have you discussed your ideas with them? If you don't have the expertise needed, will you hire a consultant?

4. **Specify the Results/Impact**
   During this step, you get more specific about the impact of your project. For example, 1000 people in King County will have access to a new type of natural healing center. Or your wildlife protection project will help salmon to thrive 90% better in Washington State. Or cleaning the water in the Satsop River (WA) will have immeasurable health benefits for the people, environment, and wildlife in the area, as well as all connected waterways.

5. **Develop a High-Level Project Scope**
   Is your project a small one that you alone or a few people will lead? Or is it a large project that requires a lot of people or resources? Who's involved/performing which tasks? How will you involve the people you are impacting, possibly at various review intervals? Remember, if it's a project you're leading, it MUST light you up personally too. Otherwise, you

might fizzle out mid-project.

6. **Determine a Preliminary Timeline**
When does the project need to be finished to achieve the intended results? Is your project time-sensitive for those who need it? Determine the date the project needs to be finished, and then "work back" to further hone a preliminary timeline for and scope of your project so you can accomplish it by the necessary date. You can fill in the details and create a detailed schedule later in the next stage: project planning.

7. **Iterate Until Satisfied**
Iterate through these steps until you're satisfied the Needs Assessment stage of your project is done, and you're ready to move forward into more detailed project planning. Or will you NOT move forward with the project? If you decide to move forward, at this point, you'll have a skeleton project plan (the high-level information) for your project. If you haven't already, it's also a good idea at this point to have someone with "fresh eyes" review your plan.

8. **Keep Sight of Your Compass**
Always ensure that your projects are aligned with our team's purpose (see WAforYou.org: How-To). Think of this are your compass to stay on course. At the end of this stage, you might have documented something that's similar to the structure in this Project Objectives/Goals Alignment PDF. (The example used in this PDF was a natural healing center.) This type of high-level document can act as a compass *specifically for your project*, as well as help you to make decisions throughout the entire project and help your team to quickly get an impression of the project.

Checklist of Other Possible Information to Use During This Stage

✓ Opportunity gap analysis
✓ SWOT (strength, weakness, opportunity, and threat) analysis
✓ A checklist of items you'd like to accomplish (such as sustainability and "do no harm") that are woven throughout every aspect of the project
✓ A brief list of interaction principles for everyone on the project (quality standards)

Project Planning

After the Needs Assessment stage, you're ready to delve into more detailed project planning and finalize the components of your project plan. There are as many ways to plan a project as there are to cook chili. We simply give you an overview here of possible components and expect you to do further research if you're new to project planning.

1. **Skeleton Project Plan**
After completing the Needs Assessment stage, you have a high-level, skeleton project plan in place as a guide for your project. During this stage, you start filling in more details until you have a fully developed project plan that sets you into motion—filled with action items. Note: It's also helpful at this point (if you haven't already) to determine what type of structure you want to use for operations—for example, a business or non-profit.

2. **Project Buckets**
In this step, you organize other areas of your project into "buckets." For example, for a natural healing center, the buckets might include: Building for the center, frequency healing devices, healers who know how to use the devices, natural medicinal products, brand identity/content for the center, marketing, and so on. For each of those buckets, you'll need to perform a type of sub-project development for them too. Need assessment, for example: What type of building do you want to buy or build? What's best for the people you're benefiting? Do they need any specific facilities in the building?

3. **Strategic Objectives vs. Detailed Goals**

Many times, the term "objective" is used in a more strategic sense; objectives provide a high-level, overall direction. For example, an objective could be to purchase a building rather than build one. This sets an overall direction immediately for all the related tasks that follow. For those tasks, which usually are more tactical in nature, we use the term "goals." For example, a goal for "healing devices" might be to have three quantum biofeedback devices, two musical instruments, and 10 tuning forks—a very specific goal. Or a goal could be something such as 50K people seeing your website/year. In this step, think about the detailed goals for priority tasks in your project buckets.

4. **Project Phases**
Especially if your project has a large scope or the funding is coming in intervals, it makes sense to use project phases instead of doing everything all at once. For example, for a natural healing center, phase 1 might simply include purchasing the building—that's your single focus. If the building drives the type of healing modalities you have, specifying that project bucket as phase 1 is a great idea. For example, if you purchase a building on a small piece of land, you might only have room for a vertical garden. Or if the building is small, you might need to pare back the number of healing devices you have. Thinking about your project in phases also helps you build in flexibility, and brainstorm viable scenarios that each might work well.

5. **Milestones/Priorities**
Milestones for your project also help you set priorities. Milestones can usually help indicate you're making progress and can also signify the priorities (at different points) for your project. For example, a milestone for a natural healing center might be: All healers have accepted work agreements. Or natural medical products have been chosen and affiliate agreements accepted. Milestones often represent a group of related tasks, as shown in those examples.

6. **Human Resources Needed**
At every level of the project, who's involved and what are they going to do? How will you find the right people? Where? Will you need to train them? Do you have a description of the tasks each role needs to perform? Will you need onboarding information for them? A natural healing center might need healers, office managers, gardeners, etc. And, the people involved in the project development might perform various roles required for the project (as discussed in the next step).

7. **Roles + Responsibilities**
With a clear picture of the human resources needed for implementation and project development, you can begin choosing who does what. Establish the responsibilities for everyone on your project team, as well as anyone else. One of the most popular methods for setting clear responsibilities for projects is OARP—owner, approver, reviewer, and participant. (Please research this method or any other methods that fit your project.) Each task, at a minimum, must have a designated owner to ensure that it is completed.

8. **Costs + Funding**
This step is straightforward. Research how much everything will cost, include cost *projections* in your project plan, and as you implement your project, you'll also track *actual* costs. Total the cost projections for each project bucket (for example) and calculate the total cost of your entire project. Funding: Where is your funding coming from? (That's very important to ensure that no strings are attached.) Is it coming from one source or multiple? Does your funding match your project cost? Why not? If not, possibly evaluate where can you cut back on costs. Important: If you must fill out a funding template for your project, at this point, you have most of the information you need, if not all, for just about any template.

9. **Risk Likelihood + Mitigation**
One of the steps in project planning that many people overlook is contingency planning. If xyz (risk) happens, how might it affect your project? What would trigger xyz? How likely is it that XYZ will happen? If the likelihood is low, you might put that risk on the back burner or have a brief response plan. If it's high, you might create a fuller contingency plan to mitigate it or adapt your project.

10. **Final Timeline + Schedule**

    As you've been iterating through the steps in this stage (as well as using your preliminary timeline from the Needs Assessment stage), you build your project schedule—it can be as detailed as necessary for your project. The tasks in your schedule might include phases, milestones, priorities, and so on. They will also include dependencies: what must happen first for the next step to be possible? Establishing your project's dependencies enables you to better manage your schedule, identify possible roadblocks, and minimize delays. A distinction to keep in mind: Timelines are usually high-level while schedules are more detailed.

11. **Iteration + Reviewing/Testing**

    Iterate, iterate, iterate through these steps. At this stage, it might also be relevant to have various key people do a final review of your project plan, as well as do some testing on people who volunteer for it. When you're satisfied the planning for your project is done, you're ready to move forward to the implementation stage.

12. **Action Items + Compass**

    Action items (tasks), who's doing what and when (responsibilities and schedules), and clearly defined results (when you can)—at a minimum, that's *required* at this stage, and it's the only way forward to successfully implement your project. Also, remember your compass: Is your project still aligned with our team's purpose (see WAforYou.org: How-To)? Is your project still aligned with your compass specifically for your project? If not, it's essential to re-evaluate now and eliminate any "scope creep"—anything that's really not in alignment with your project or is simply unnecessary.

Checklist of Other Possible Information to Use During This Stage

- ✓ *Tools* to use for detailed project planning, such as online tools that you can easily share with your team
- ✓ A spreadsheet that shows equipment and material resources needed + costs
- ✓ Quality standards/quality assurance plan
- ✓ Scenario planning—using this method, you can also "plan" at a high level for various scenarios that could occur. This aids in flexibility and helps you adapt more quickly.
- ✓ Frameworks—using this planning element, you can plan gradually by first filling in the key areas of a project/bucket, and then *gradually* filling in the details as they become apparent (rather than starting with too many overwhelming details). Frameworks can be a great tool to use for large projects.
- ✓ So much information at this stage depends on the type of project you're planning

Implementation + Results Assessment

Now, you make a major shift into implementation + ongoing results assessment. It's a totally different mindset. The initial planning is done. Celebrate! You've come a long way.

1. **Are You Ready?**

   There are two prongs to this question. One is regarding someone who starts projects but doesn't pay much attention to planning. Are you *really* ready? Will your team have a great experience because of your and everyone's due diligence? If you're truthful and you're not ready, just hone the necessary areas with your team's help. The second prong of this question relates to perfectionists who succumb to analysis paralysis. Are you one of those? If you are, you might just need to dive in and trust that you're good to go. Your 80% might be someone else's 200%. Also, truthfully evaluate this question: Are you the right person to lead the Implementation stage? If not, find someone on your team who is.

2. **Go For It—Implement**

   Put your project plan into ACTION! Be a leader who IN-powers your team. Stay flexible where needed and make changes as needed. And, in other areas, what might be required is to stand firm, as well as to avoid the "scope creep" that we mentioned in the Project Planning stage. Gather reports at necessary intervals. Unanticipated issues will arise but if you look at them as opportunities to improve your project and enable you to possibly accomplish something even better,

just imagine that!

3. **Ongoing Project + Operations Management**
Does your project require ongoing project management? Most do. Who's the best person to do that? For example, for a natural healing center, who is your operational manager? Who is the front-end manager in the clinic who interacts with people? How do they coordinate? What's your role in ongoing operations, if any?

4. **Ongoing Results Assessment**
This circles all the way back to the beginning: Needs Assessment. Did you accomplish your intended results? If not, why not? Did you deliver unintended results that were also amazing, or not so much? What do you need to adjust, improve, or eliminate? Do you have testimonials from those you helped? Was your project effective; do you consider it a success? How do you feel about the project? How do the people, wildlife, and environment of Washington State feel? Celebrate! You've come a long way. And you've helped us all accomplish our vision: A bright future for Washington State. *Thank you.*