How to plan a pilot

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Notes document:
https://etherpad.wikimedia.org/p/Pilot_planning

Agenda

- What is a pilot?
- Why would you run a pilot?
- How do you plan a pilot?

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What is a pilot?

No, not an airplane pilot

Pilot
Experiment
Test
Trial
Proof-of-concept

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A pilot is...

“An experimental or preliminary
trial or test
of your solution
on a limited scale.” [1]

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A pilot...

- **Tests an idea.** You're trying to prove your idea can be done.
- Is **small**. Less than 20 people. Less that 3 events.
- Is **simple**. It is a place where **you can easily make mistakes, easily change things**. Nothing is permanent or irreversible.
- Leads to **incremental benefits.** The impact of a pilot will likely be small, and that's okay.

When would you pilot?
Why would you pilot?

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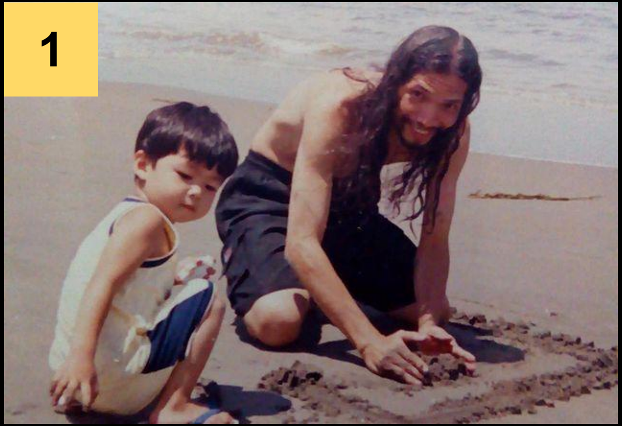
Sandcastle (n.)

a small model of a castle or other building that is made with wet sand on a beach[2]

Situation:
You’re at the beach

Problem:
There are no sand castles on the beach.

Solution:
You will build a sand castle.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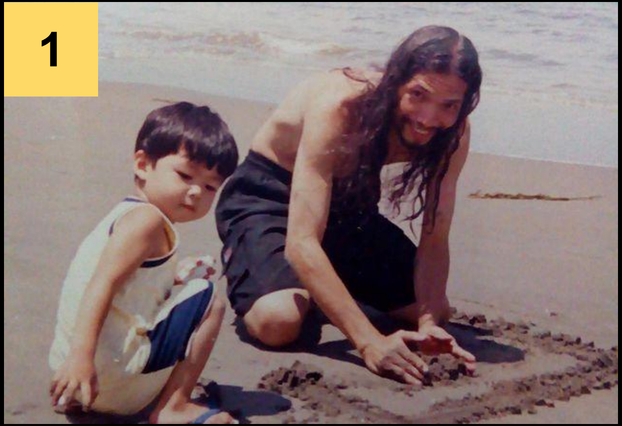

When would you pilot?

Not until you have the basic skills down first.

Why would you pilot?

A pilot allows you to try things. Make mistakes at low risk. Refine. Perfect.

We pilot...

- **To test feasibility.** We want to be sure our idea is can be done.
  - We want to know that we have the skills, resources, support, policies, processes, etc. to succeed.
- **To understand impact.** We want to be sure our idea is worthwhile.
- **To minimize future risk.** The risk of not testing our idea is usually high. We want to lower the risk of volunteer burnout, wasting money, losing trust...

Questions?

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How to plan a pilot?

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5 steps:

1. Define the problem
2. Define the solution. List your assumptions
3. List your constraints, resources, activities
4. Create a monitoring plan (this is optional)
5. Create an evaluation plan (this is critical)

#1:

Define the problem.
The problem should be
small.

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What is “small” enough?

- The pilot can be **done within the human, financial and technical resources available**.
    - Example: Less than 20 participants. Only 1 partner (if any). Less than 3 events.

- At the end of your pilot, you have **a very clear sense of success or failure** in addressing that problem.

Example

Initial problem: There aren't enough **biographies about women scientists** on Wikipedia.

- ... about **African American** women **engineers** on **English WP**.
- ...about African American women engineers **within the field of Electrical Engineering** on English WP.
- ...about African American women engineers within the field of Electrical Engineering on English WP, **born after 1950.**

Exercise #1 (5 min)

Work by yourself.

Identify a problem you’d like to solve.

Write three versions of this problem that are smaller than your initial one.

Remember!

#2:

Define the solution you want to test.
It should be **simple**.

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What is “simple” enough?

- List about your assumptions. **Are your assumptions realistic?**
- Consider your skills and experience, and that of your project team. How experienced are you? How much are you experimenting with? **You should only be testing one thing.**
- Who will participate? Are you asking your people to do too many things? Complex things? **Keep the tasks as simple as possible. Too much training can be costly and complex.**
- Who will be affected by your pilot? **Get their buy in first.**

Exercise #2 (10 min)

Work by yourself.

For the smallest problem you wrote down before, write down a solution to the problem.

Under your solution:

- List 3 assumptions about your project, and why you think those assumptions are true.
- List 3 skills you **don't** have, that you need for this project to succeed.

Exercise #3 (15 min)

Find a partner.

With your partner, share your problem, solution, and assumptions.

Discuss these questions with your partner:

- Do you think my problem is **small enough?**
- Do you think my solution is **simple enough?**
- Do you think my **assumptions are realistic?**

Now let the other person share.

#3: List your constraints, resources and then activities

Resources: How many volunteers or staff? How much budget (if any)? Any tools you can use?

Constraints: Do you have a deadline? Do you have limited resources? Are there cultural behaviors that prevent or inhibit this work?

With these in mind, list your activities and create a timeline and task list, if needed.

#4: Create a monitoring plan (this may be optional)

How will you know how things are going?

For example,

- How will you monitor volunteer motivation and burnout?
- How will you know about obstacles that occur?

If your are the central coordinator, you may not need this.

#5: Create an evaluation plan

Caveat: We won't be covering how to create an evaluation plan.

#1: How will you know if you are successful?

What results do you want to see?

- Think in terms of change: “From X to Y”.

Who or what will benefit from this change? How?

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#2: What will you do with the results of your pilot?

Here are four things that could happen:

- The pilot was **successful**, and you decide to **scale it up**.
- The pilot was **successful**, but you **decide not to scale it up**.
- The pilot was **unsuccessful**, and you **give up the idea**.
- The pilot was **unsuccessful**, but you **learned something useful**, such as what you could change to make your idea successful. You'll try again.

5 steps:

1. Define the problem.
2. Define the solution. List your assumptions.
3. List your constraints, resources, activities.
4. Create a monitoring plan
5. Create an evaluation plan

THANK YOU

Questions?

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Notes & References

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Notes:

- [1] http://sixsigmastudyguide.com/pilot-implementation-planning/
- [2] https://www.merriam-webster.com/dictionary/sand%20castle

Additional resources

- http://apps.who.int/iris/bitstream/10665/44708/1/9789241502320_eng.pdf
- http://sixsigmastudyguide.com/pilot-implementation-planning/
- http://www.quickbase.com/blog/conducting-a-pilot-may-be-the-best-bet-for-project-success
- https://resources.sei.cmu.edu/asset_files/Presentation/2004_017_001_22829.pdf

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A pilot...

- **Tests an idea**
- Is **small**
- Is **simple**
- Leads to **incremental benefits or has a small impact**