

# Project Planning Tools



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**How to plan a project that will help  
you achieve the goals in your annual  
plan.**



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# What do you need to plan a project?



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# You need:

1. **A clear goal**
2. **Background research**
3. **Task lists & timelines**
4. **People & resources**
5. **A communication plan**



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# 1. A clear goal

- What you hope will change as a result of the project?
- Why is the outcome of this project is important?
- What methods, rules or activities can help achieve these goals?



**“I want to do \_\_\_\_\_ so that  
\_\_\_\_\_ happens.”**

**Right now, \_\_\_\_\_.  
After this, I hope \_\_\_\_\_.”**



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# Example 1: Wiki Loves Africa

“I want to host Wiki Loves Africa so that more articles about African culture can be illustrated.

Right now, only 20 of 300 articles about Ghanaian Fashion have images. By the end of this project, we hope 70 of 300 articles have images.”



## 2. Background research

- What similar projects have you seen in the movement and beyond?
- What lessons can you learn from grant reports?
- Are there tools that can be used or adapted for your project?

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# 3. Task lists & timelines

- Does the timeline interfere with planned work and events?
- What tasks depend on the completion of previous tasks?
- How can someone ask for help if they cannot complete a task?

## Iberocoop:Iberoconf 2017/Cronograma

Deadline	Descripción del trabajo	Responsable	Status
05.01.2017	Decisión de la Comisión Directiva de <a href="#">Wikimedia Argentina</a> de organizar Iberoconf 2017	Comisión Directiva <a href="#">Wikimedia Argentina</a>	hecho
07.01.2017	Comunicación del evento a <a href="#">Iberocoop</a>	<a href="#">Galileo Vidoni</a>	hecho
12.01.2016	Organización del Comité de Selección	<a href="#">Anna Torres (WMAR)</a>	hecho
25.01.2017	Envío encuesta para definir participantes	Comité de Selección	hecho
30.01.2017	Entrega encuesta organizaciones interesadas	Comité de Selección	hecho
05.02.2017	Presentación de los criterios para definir a los participantes en meta	Comité de Selección	hecho
07.02.2017	Publicación resultados participantes Iberoconf 2017	Comité de Selección	hecho
07.02.2017	Publicación página del evento en meta	<a href="#">Anna Torres (WMAR)</a>	hecho
07.02.2017	Publicación "Preguntas y Necesidades"	<a href="#">Anna Torres (WMAR)</a>	hecho
10.02.2017	Respuestas "Preguntas y Necesidades"	<a href="#">Constanza Verón (WMAR)</a>	hecho
14.02.2017	Presupuesto final Iberoconf 2017	<a href="#">Sebastián Kersner</a>	hecho
14.02.2017	Traducción del grant	<a href="#">Anna Torres (WMAR)</a>	hecho
21.02.2017	Definición fechas y venue	<a href="#">Giselle Bordoy (WMAR)</a>	hecho
23.02.2017	Definición inicial programa Iberoconf 2017	<a href="#">Anna Torres (WMAR)</a> / <a href="#">Luisina Ferrante (WMAR)</a>	Pendiente
26.02.2017	<b>Presentación del Grant</b>	<a href="#">Anna Torres (WMAR)</a>	hecho

# 4. People & resources

- Space
- Reliable internet and power
- Snacks for attendees
- Experts (editors, photographers, etc.)
- The right participants

Details:

[meta.wikimedia.org/wiki/Grants:Project/Rapid/Plan](https://meta.wikimedia.org/wiki/Grants:Project/Rapid/Plan)



Project task	Volunteer responsible	Task dates	Notes	Estimated time commitment
Manage mailing lists	Josephina	ongoing through May 2015	This person will need to start the project mailing list in January and send out emails every 30 days until May 2015.	5 hours
Media outreach	Vijay	April 1 through May 15 2015	This person will be responsible for contacting the media before the event, and posting links to media mentions on project page after the event.	8-10 hours
Event facilitator	(Volunteer needed)	April 1 through April 30 2015	This person will help develop the event agenda and lead activities at the event on April 30th.	8 hours
Event note taker	Jorge	April 30th 2015	This person will need to attend the event and take notes for four hours on April 30th.	4 hours





# What might we look back on?



# How do we know how it went?

We want to learn **with you** what works for your community so that you can increase your impact.

Examples:

- New editors or volunteers
- Results from a survey
- Things that went wrong



Project roles:

[https://meta.wikimedia.org/wiki/Grants:Learning\\_patterns/Project\\_roles](https://meta.wikimedia.org/wiki/Grants:Learning_patterns/Project_roles)

Timeline for tasks:

[https://meta.wikimedia.org/wiki/lberocoop:lberoconf\\_2017/Cronograma](https://meta.wikimedia.org/wiki/lberocoop:lberoconf_2017/Cronograma)

[https://meta.wikimedia.org/wiki/Wikimedia\\_CEE\\_Spring\\_2015/Timeframe](https://meta.wikimedia.org/wiki/Wikimedia_CEE_Spring_2015/Timeframe)

Plan for how to meet goals:

[https://meta.wikimedia.org/wiki/Wikimedia\\_CEE\\_Spring\\_2016/Goals](https://meta.wikimedia.org/wiki/Wikimedia_CEE_Spring_2016/Goals)

Communication protocols: [https://meta.wikimedia.org/wiki/Wikimedia\\_CEE\\_Spring\\_2015/Meetings](https://meta.wikimedia.org/wiki/Wikimedia_CEE_Spring_2015/Meetings)

Project planning cheat sheet:

[https://docs.google.com/spreadsheets/d/1gJWP7beA9176loexgnTj5fxsdjJ57\\_iyI1JIFzX45ho/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1gJWP7beA9176loexgnTj5fxsdjJ57_iyI1JIFzX45ho/edit?usp=sharing)

Collaborative planning tools:

- Phabricator - WM SE uses it, Venezuela, Education Collab, engineering tasks
- Google Docs - commenting is much easier
- Telegram and WhatsApps - have polling functions



# Questions? Tools to share?



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