

Planning Challenges

Scenario One

Situation

There is a lack of common understanding among team members/partners about things such as

- project vision, goals, objectives, and values;
- vision, goals, objectives, and values of individual team members/partners;
- who owns work products; and
- members/partners competing for funding.

Solutions

- ☐ Set (with all team members, if feasible and at appropriate stage of development) and put in writing team vision, goals, objectives, values.
- ☐ Frequently review and, if necessary, revise Terms of Reference.
- ☐ Establish commitment/agreement to Terms of Reference with the organizations – not just the individuals at the table.
- ☐ Discuss and put in writing the organizational (or, if volunteers, the personal) objectives of each team member/participant.
- ☐ Create a Letter of Understanding including common vision, risks/costs/gains analysis of each partner, and obligations/expectations

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Scenario Two

Situation

There are differing levels of commitment and participation from team members/partners based on

- whether they are participating as a volunteer vs. staff member of an organization,
- amount of time they are willing (volunteer) or able (staff) to give (e.g., attendance, acting on agenda action items promptly), and/or
- whether they were assigned to or chose project.

Solutions

- ☐ At initial meeting, set and put in writing ground rules about how decisions will be made (consensus, vote, etc.). Include *when* decisions will be made and what decision-making power people at the table must possess for their organization. Also, address how absent partners will or will not be involved in decision-making process.
- ☐ Put ground rules about meeting logistics (e.g., location, minutes) in writing.
- ☐ At the first meeting, negotiate and record (Terms of Reference) clear roles and responsibilities for each team member (including money and time). Use a RASCI analysis to guide this process.
- ☐ Keep good minutes that include action steps that have been agreed to, the person/people responsible and the date due.
- ☐ Ensure timely distribution of meeting minutes that clearly outline action items for each individual (but respect busy schedules).
- ☐ Be sure to follow-up on action items from each meeting.
- ☐ Consider a rotating chair.
- ☐ Acknowledge differing strengths/interests of team members/partners when agreeing on overall team/partnership roles/responsibilities. Put roles/responsibilities in writing.
- ☐ Frequently review and, if necessary, revise Terms of Reference.

- ☐ Consider using subcommittees.
- ☐ Recognize volunteers frequently.
- ☐ Involve all members in the decision-making process – do not have "token" members.
- ☐ Provide food at meetings!
- ☐ Develop job descriptions for volunteers, just as you would employees
- ☐ Ensure there is commitment to ongoing volunteer management

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Scenario Three

Situation

There are relationship challenges such as

- lack of trust due to historical issues,
- personality conflicts,
- power struggles, and/or
- hidden agendas.

Solutions

- ☐ Make a commitment to aim for consensus.
- ☐ Set, and put in writing, rules of conduct (e.g., respect for each other).
- ☐ Discuss and put in writing the organizational (or, if volunteer, the personal) objectives of each team member/participant.
- ☐ Set, and put in writing, ground rules at initial meeting about how decisions will be made (consensus, vote, etc.).
- ☐ Consider a rotating chair.
- ☐ Set time limits for each speaker/agenda item and have a timekeeper.
- ☐ Provide an anonymous comment box at meetings.
- ☐ Consider standing agenda items that provide each team member a chance to speak/debrief.
- ☐ Communicate frequently about activities happening between meetings.
- ☐ Conduct frequent debriefings about processes and commit to actively improving upon them.
- ☐ Involve all members in the decision-making process – do not have "token" members.
- ☐ Address all issues as they arise.
- ☐ Agree to the methods by which input from all team members/partners will be gathered.

- ☐ Meeting facilitator/chair should use various techniques to encourage participation from all present.
- ☐ Decisions from the "top" should be clearly explained and reactions and implications discussed.
- ☐ Ensure that there is proper 'space' and airtime provided to discuss tensions in a constructive way.
- ☐ Make a commitment to learning and following constructive feedback methods.
- ☐

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Scenario Four

Situation

Making decisions is difficult. This situation may be compounded by individuals at the table (either delegates or permanent members) who don't have decision-making power (and in some cases, don't have the background knowledge either).

Solutions

- ☐ At the initial meeting, set, and put in writing, ground rules about how decisions will be made (consensus, vote, etc.). Include when decisions will be made and what decision-making power people at the table must possess for their organization. Also address how absent partners will or will not be involved in the decision-making process.
- ☐ Set (with all team members, if feasible and at appropriate stage of development) and put in writing team vision, goals, objectives and values.
- ☐ Consider using an outside facilitator.
- ☐ Review previous minutes prior to each meeting to ensure everyone is starting from the same understanding.
- ☐ Consider a rotating chair.
- ☐ Agree to, and outline the approach to, planning in the Terms of Reference. This should include the principles on which decisions should be based (e.g., evidence, recommended practices).
- ☐ Involve all members in the decision-making process – do not have "token" members.
- ☐ Agree to the methods by which input from all team members/partners will be gathered.

Planning Challenges

Scenario Five

Situation

There is rushing and resistance to planning process, as well as resistance to change in general (we've always done it this way).

Solutions

- ☐ Consider using an outside facilitator.
- ☐ Make use of existing evidence and experts.
- ☐ Find creative ways to minimize additional time commitments of team members/partners (e.g. combine events/meetings).
- ☐ Educate everyone about (and advocate for among team members) best practices in planning, rationale, potential impact on outcomes and specific processes that have been chosen for a particular effort.
- ☐ Agree to, and outline the approach to, planning in the Terms of Reference. This should include principles on which decisions should be based (e.g., evidence, recommended practices).
- ☐ Acknowledge differing strengths/interests of team members/partners when agreeing on overall team/partnership roles/responsibilities. Put roles/responsibilities in writing.
- ☐ Consider using subcommittees.
- ☐ Conduct frequent debriefings about processes and commit to actively improving upon processes.
- ☐ Involve all members in the decision-making process – do not have "token" members.
- ☐ _____
- ☐ _____

Planning Challenges

Scenario Six

Situation

Large project catchments areas may have partners that are quite far apart geographically.

Solutions

- ☐ Use technology creatively (e.g., web-facilitated phone meetings).

- ☐

- ☐

- ☐

Planning Challenges

Scenario Seven

Situation

Large amounts of data collected during the situational assessment, from stakeholders, literature and various other sources are overwhelming, making it difficult to decide which goals, objectives and populations of interest are most obviously linked to the data.

Solutions

- ☐ follow the 1-3-25 rule of Knowledge Exchange; aim to create a one-page summary with up to 7 bullet points, a 3-page executive summary, and a report that is up to a maximum of 25 pages
- ☐ Follow Pareto's Law; focus on the 20% of the information that conveys 80% of the most important findings
- ☐ Use charts and maps (e.g., mindmapping) to present visual representations of the information
- ☐ Start with the end in mind. Create a single document organized around the most important aspects and keep bringing in the best information to populate the most important sections.
- ☐ Organize around 3 key questions: what is the problem? What causes it? What are possible solutions?
- ☐ Use an information specialist
- ☐ Theme each piece of important information
- ☐ Split up the data among various planning committee members and ask them to review with a few specific questions in mind (e.g., what population of interest should be our focus?)
- ☐ Cull the data before analysis for only those aspects of most use
- ☐ Designate one person per research question, then have them review all data, but look only for answers to their particular research questions
- ☐ Sort the data based on the relative importance of the source, then starting at the top of the pile, deal with whatever amount you can handle

Planning Challenges

Scenario Eight

Situation

Difficulty choosing the best strategies and activities to meet the stated goals and objectives.

Solutions

- ☐ Use voting methods such as dotmocracy or online polls, to see where everyone stands on the selected alternatives
- ☐ Negotiate the decision process, with timelines, in advance
- ☐ Be clear as a group on what is meant by 'best'
- ☐ Establish criteria in advance of examining potential strategies
- ☐ Go with an existing set of well-respected strategies (e.g., Ottawa Charter for Health Promotion) and focus energy on selecting activities within those strategies
- ☐ Do a force field analysis on most likely choices
- ☐ Apply filters of need, impact, capacity and mandate to all possible choices