

Planning chart

Use

The planning chart is the most important and central tool for the planning of a project. Its function is:

- to separate visions, aims and objectives (effects/results) from strategies and measures (activities)
- to specify and to clarify project aims and objectives
- to define indicators for success and desired target values
- to decide on strategies
- to break down the project into distinct stages marked by 'milestones'

Instructions

I. Classify visions and objectives

Visions are relatively abstract and generally ambitious declarations of intent with a timeframe that may stretch beyond the end of a project (5-20 years). A vision anticipates a desired state and the project aims to achieve it. To keep the vision in mind throughout the project can have a motivating effect and act as a guiding principle. It is for this reason that the top place in the planning chart (see figure 2) is given to the 'vision'.

Objectives or *targets* follow on from the vision and describe the results and effects that the project sets out to obtain.

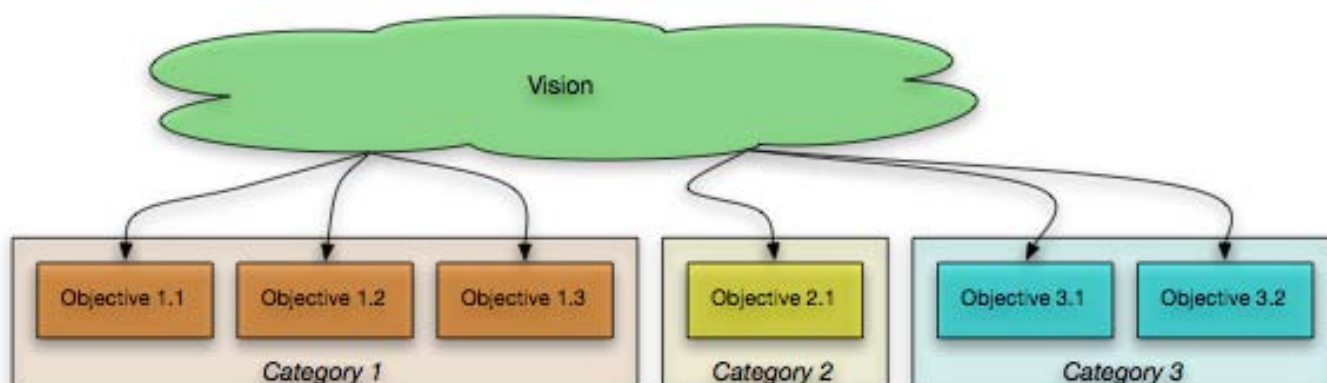


Figure 1: Hierarchy of objectives

There are different kinds of objectives and it is useful to group, categorize and number those together that refer to the same setting or target group – it will make planning and orientation easier. Categories of objectives can be entered as intermediary titles in the grey shaded cases of the planning chart (see Figure 2).

Project drafts or project designs often do not distinguish clearly between *visions/objectives* (what do we want to achieve?) and *strategies/measures* (how do we want to get there?). Put aside all objectives that include actions or activities as a first step. They will be treated later, i.e. when you define and describe strategies and interventions.

II. Redefine the objectives: stating the desired effects clearly and make them SMART

At the beginning of a project, objectives are often formulated in a vague and yet unspecific way and resemble visions rather than clearly defined objectives. When you reformulate objectives, think clearly about the *effects* that you expect to generate in a particular setting or target group. Describe the desired state of the setting or the target-group that you expect at the end of the project. More information on this subject is available under "Definition of objectives".

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Planning chart – [Project X]

General Planning

Vision						No	Time schedule	Milestones (dates)
						1		
						2		
						3		
						4		
						5		
						6		

No	Objectives	C	Indicators	Target values	EV	Strategies
1	[Category 1]					
1.1	[Objective 1.1]					
1.2						
2	[Category 2]					
2.1						
3						

Figure 2: Planning chart

In the next step, try to express the project objectives in a SMART way and test the way you formulated them with the following criteria:

- **Specific** (describe clearly and precisely what the envisaged change consists of)
- **Measurable and verifiable** (achieving the objective can be evaluated and measured)
- **Achievable and challenging** (the objective should provide you with a challenge and yet be achievable)
- **Realistic** (the objective(s) can be achieved with the available resources and within the stated timeframe)
- **Time-limited** (it is clearly stated when the objectives should be achieved – usually by the end of the project)

Reformulating objectives, strategies and measures is a time-consuming and challenging task and must not be underestimated; allow sufficient time. Project objectives are an integral part of the contract you negotiate with your client– marked in column 'C' -; later adjustments of the objectives will only be possible with consent.

Enter the reformulated objectives in the relevant column of the main chart (Figure 2) and make sure that you assign them to the correct category of objectives.

III. Establish indicators, desired target values and evaluation needs

In order to be motivational, the wording of objectives needs to be concise and memorable. This is not always compatible with the requirement that the objectives be measurable and verifiable. You have to establish indicators and desired target values so that your project's achievements can be measured.

Your own level of aspiration largely determines the degree to which an objective is achieved. You can express it quantitatively in the column "desired target values". More information is available under the topic 'Indicators'.

The formulation and nature of indicators and objectives determine how your project will be assessed. Accordingly, assessment will be possible immediately at the end of the project or an evaluation will be necessary after its conclusion. Objectives needing an evaluation will be entered in the column "EV" and will be copied to the evaluation table at a later stage.

IV. Define strategies

The definition of the strategy is as important as the formulation of objectives. A strategy describes the necessary steps needed to reach an objective. It does not yet determine who precisely will be doing what and by when. The last column of the main planning chart provides the space for a chronological listing of the strategic steps needed in order to achieve each objective.

V. Progression by 'milestones'

The implementation phase of longer projects should be divided into shorter stages by so-called 'milestones'. This will facilitate the management of the project. Depending on the project, this type of sub-division may be formally demanded by the client.

It is advisable to divide the implementation phase of a project into stages of 3 – 9 months. Indicate in the main planning chart the duration of each stage and the dates when each 'milestone' should be reached.