

# 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 and measures
- to break down the project into distinct stages marked by *milestones*

## Instructions

### I. Formulating a vision

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 recommended that the *vision* be introduced into the planning chart (see Figure 2).

### II. Defining strategies

Strategic approaches to the project, i.e. the outlines of the implementation, are defined in parallel with the objectives. Strategies and objectives are inter-related and are therefore developed in an iterative process. Usually, one strategic approach applies to several objectives and it is for this reason that strategic approaches are usually presented above project objectives. In the appropriate table, make a list of the strategies chosen for the project.

### III. Establishing a timeframe (beginning, end and milestones)

Subdividing the implementation phase of a project into shorter stages will facilitate its management. This type of subdivision is sometimes formally demanded by the client. It is advisable to establish milestones at regular intervals (3 – 9 months) throughout the implementation phase, and to use them in order to review progress (see topic *milestone meetings*). Indicate the name and date of each milestone in the main planning chart.

### IV. Defining objectives

Project objectives are lower down in the hierarchy than visions (see Figure 2). They represent the concrete results that ought to be achieved by the end of the project. At the beginning of a project, objectives are often formulated in a vague and unspecific way, and resemble visions rather than clearly defined objectives. When reformulating your objectives, think about the effect that you wish (and are able) to generate in a particular setting and/or target group(s) by the end of the project. Describe the

desired state of the system in which you intervene and that you expect at that point in time. More information on this subject is available under 'Definition of objectives'.

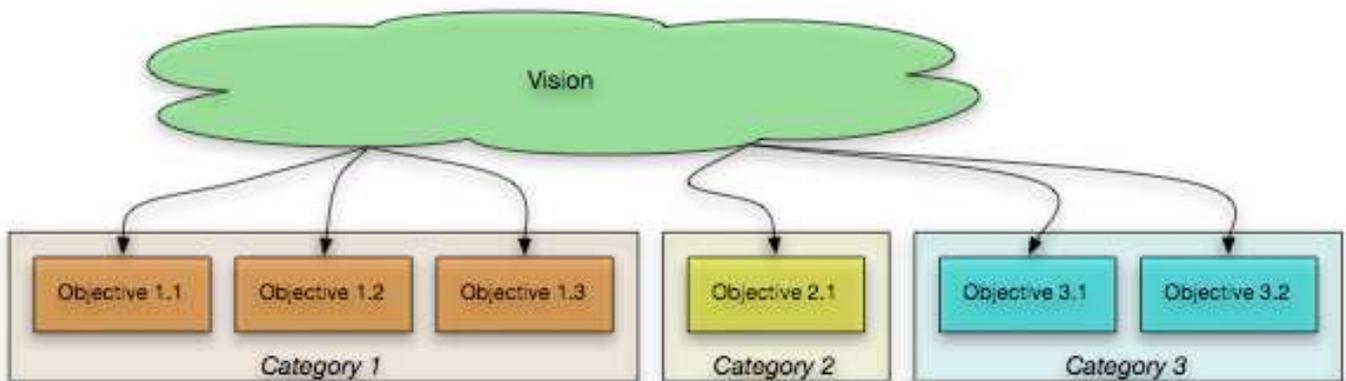


Figure 1: Hierarchy of objectives

Objectives regarding the same system (setting, target group) or the same strategy should be grouped, categorized and numbered. This will make orientation easier later on. Categories of objectives can be entered as intermediary titles in the grey shaded boxes 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?). As a first step, put aside all 'objectives' that contain actions or activities. They will be treated later, i.e. when you define and describe strategies and interventions.

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

- **Specific** (describe clearly and precisely what the envisaged change consists of)
- **Measurable** (achieving the objective can be evaluated and measured)
- **Attractive** (efforts are needed in order to achieve the objective.)
- **Realistic** (the objective(s) can be achieved with the available resources and within the stated timeframe)
- **Time-framed** (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 his or her 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.

## Planning chart – [Project X]

Vision	No	Title milestones	Dates
		Beginning	
	1		
	2		
	3		
	4		
	...	End	

No	Strategies
1	
2	
3	

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

Key: C = Contract objectives (contractually binding objectives), EV = Evaluation (objectives needing special evaluation measures)

Figure 2: Planning chart

## V. Establishing indicators, desired target values and evaluation needs

In order to be motivational, objectives need to be formulated concisely and memorably. 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. In the column *desired target values*, you enter for each objective the level (expressed quantitatively) of achievement that you aspire to. More information is available under the topic *Indicators*. The formulation and nature of indicators and objectives determines how your project will be assessed. It may be possible to see immediately after the end of the project if the stated objectives have been achieved, or an evaluation will be necessary. Objectives needing an evaluation will be entered in the column 'EV' and will be copied to the evaluation table at a later stage.

## VI. Defining measures

Once project objectives and strategies have been defined, concrete measures are deduced from these and assigned to the relevant objectives. After checking the feasibility of the concrete measures, it is possible that some objectives and strategies may need to be redefined once more so that they correspond to the measures.