Making the Jump
Shaping Your Ideas into Successful Project Plans

Paul Stavast
Museum of Peoples and Cultures, BYU
What Do You Do With An Idea?

Written by Kobi Yamada
Illustrated by Mae Besom
Where did it come from?  Why did you have it?

What do you do with an idea?

What will people say about it?  Is it your idea?
Do you have any idea?

- Where do you start?

- Does your idea lend itself to becoming a project?
  - Is it action oriented, focused on change, longer-term effort

- Does the context of the idea support growing it into a project?
  - Research the policies, founding documents, and history of the museum
  - How do these items constrain/limit your idea?
  - How do these items open up possibilities?
Idea, Tasks, or Project

- **Task**: a single activity often done as a chore or out of duty
- **Task list**: multiple activities that need to be done but are unrelated or loosely related to each other.
- **Project**: a distinct defined collection of related activities performed to achieve a clear objective(s) by using dedicated and necessary resources.
Cost Benefit Analysis

Low Cost       High Cost

Low Benefit     High Benefit

Go for it

Why bother

Be Careful

Watch out

Opportunity costs: cost of not doing something or doing something different
• “I worried what others would think...I kept it to myself...I tried to act like everything was the same as it was before my idea showed up.”

• “but there was something magical about my idea ... I felt better and happier when it was around.”
What would people say about my idea?

- How do you feel about your idea?
- How does what others say about your idea make you feel about your idea?
Risk Assessment

- Threats-perceived vs real
- Resources
- Modifying factors
- Consequence of materialized threat
How do you give it your attention, grow it, develop it?

• Do you feel stronger (positively or negatively) about it the more you work with it?

• What other things do you do to support/enlarge your idea?

• How do you define your idea?
  • Defining the problem/issue the idea addresses can be as important as finding a path for a solution.

• For how long?
Growing (Planning) is a process

- Initial planning should be followed up by reviews and adjustments
- Plans should not be set in stone
- Costs of Not Planning
  - Multiple opportunities/directions cannot be explored
  - More money and resources likely to be spent as work meanders and changes indiscriminately
  - Encourages overspending and expensive mistakes
  - Meetings that are a hindrance, ineffective

- Effective planning meetings
  - produce results
  - Allow for a quick response to issues
  - Ensure project does not get away in money, concept, resources, etc.
Whose idea is it?

• If it’s yours, can you ever get away from it? Doesn’t it follow you?
• Who could benefit from your idea?
• Whose help do you need to develop your idea?
• How do you own it?
• When should you give it to someone else?
Who should Participate in Planning

• Identify stakeholders who should participate
  • May include: lower level staff, directors, volunteers, physical facilities, educators, the public, collection managers, registrars, conservators, lawyers, etc.

• Take the time to find out who might be a hidden stakeholders

• Involve stakeholders in meaningful ways

• Identify the objectives of the stakeholders
Tip - Keep Records

- Document the growth and changes
- Helps resolve concerns/issues as decisions are recorded
- Assists in communication
- Clarifies instruction and directions
- Records achievements and failures
How is your idea changing you?

- Can you exist without it?
Project Planning Worksheets
Tips for Writing an Project Proposal

- Focus on summary statements
- Use strong, positive language, will vs. might
- Use language to entice reading entire document
- Read it out loud while editing
- Tailor to specific audience-this implies knowing exactly who your audience is
Establish the Context of the Project

- Statement of Purpose
- Where does it fit within the history of institution
- Review of previous work
- Summary of what is already known
How are you going to accomplish the goals (Methods)

• Summary of techniques used, with detail
• Who will do what when
• Why did you do it a specific way (academics describe this as a theoretical approach)
• Why did you not use a different method
Make a schedule

- Include lead and lag time
- Use existing charts figure for estimates (or make your own)
- Benchmark and follow-up
- Hold effective meetings
What is a budget?

• A plan expressed in numerical terms of an organization’s dreams (or needs) which establishes acceptable and quantifiable performance
Common Budget Problems

• Inaccuracy
• Timeliness
• Unshared/unknown assumptions
• Perceived inflexibility
• Beginning gets more than end
• It’s only about money
• No contingency (minimum 5%)
What if you’re short of time

• Trading Time—give up something to get more time
  • Change the project scope
  • Spend more money to create more time
  • Adjust the quality of work (Gold vs Silver)
  • Change the risks that are acceptable
Planning and Evaluation

- Can’t evaluate effectively things not planned
- Planning sets where you’re going
- Evaluation helps determine if you’re on the path you want and if you got where you wanted to go
What do you evaluate?

- The project itself
- Individuals working on project
- Meaningful aspects
What Needs to be in place for effective evaluation

- Previously established standards
- Performance that can be judged against the standards
- Corrective action or suggestions to move toward standard
“And then, I realized what you do with an idea... You change the world.”
Challenge

• Add to your idea this week. Keep your egg and add slips (feed) your idea.

• Bring your egg with 10 added slips to me on Friday at the end of the conference and you’ll get a prize (first 10 people).
Building Up Ideas Activity

Over the course of the conference answer these questions. Write your answers on a slip of paper and put into your egg. On Friday, find me, Paul Stavast, and discuss 10 things you’ve added to your idea egg and you’ll receive a prize.

My Idea is:
• I had my idea because:
• I can overcome challenges to my idea by:
• I can own my idea more by:
• Thinking about my idea inspires, energizes, or makes me happier because:
• I can pay more attention/encourage my idea by:
• I can help my idea develop, deepen, expand by:
• Thinking about my idea has helped me in other areas such as:
• My idea has helped me to see ________________________ differently?
• I can’t imagine my life without my idea because:
• My idea will change the world of ________________ by:
PROJECT PROPOSAL WORKSHEET

PROJECT INFO:

<table>
<thead>
<tr>
<th>Title</th>
<th>Project Begin Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Leader</th>
<th>Avg hrs/wk</th>
<th>Project End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Departments Impacted:</th>
<th>Collections</th>
<th>Custodial</th>
<th>Education</th>
<th>Exhibits</th>
<th>Facilities/Grounds</th>
<th>Fundraising</th>
<th>Graphics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Project Summary

What are the project outcomes/objectives and products?

How does this project support the mission of the MPC?

Who is the audience? (who are they and what are their needs)

How does this project fill a unique niche? Who/what is the competition?

How will the project be advertised/promoted?

TIMELINE:

<table>
<thead>
<tr>
<th>PROJECT PHASE</th>
<th>MAJOR MILESTONE</th>
<th>EST. COMPL. DATE</th>
<th>FUNDING SOURCE(S)</th>
<th>AMOUNT/ VALUE</th>
<th>% OF BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLANNING</td>
<td></td>
<td></td>
<td>BYU Budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NEEDS ASSESSMENT</td>
<td></td>
<td></td>
<td>Gift/Donations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DESIGN/CONSTRUCTION</td>
<td></td>
<td></td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXECUTION</td>
<td></td>
<td></td>
<td>Total Est. Cost</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASSESSMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRANSFER/CLOSING</td>
<td></td>
<td></td>
<td>Est. Income</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ESTIMATED FUNDING:

<table>
<thead>
<tr>
<th>GROUP</th>
<th>PROJECTED #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stud. Mentored</td>
<td></td>
</tr>
<tr>
<td>Attendance</td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

ANTICIPATED IMPACT:
NEEDS ASSESSMENT WORKSHEET

AUDIENCE’S NEEDS

What are the project’s anticipated outcomes for the audience? What will the audience do/be as a result of the project?

What is the gap between the current state of the audience and the anticipated outcomes? How do you know this?

Why is it important to fill the gap? What are likely consequences for the audience if the project does not meet the anticipated outcomes?

Based on the characteristics of the audience (intellectual, emotional, social, logistical), what is the best way to fill this gap?

What barriers/issues keep the audience from reaching the outcomes on their own?

What must be done to remove barriers/assist the audience in moving toward the outcomes/objectives?

What indicators will show that the audience achieved the anticipated outcomes?

PROJECT TEAM NEEDS

What knowledge, skills, abilities does the project team need to execute the project? We need staff who can...

What training do project staff need to successfully complete the project?