

Activity4 – “Planning”**Part 1 – The To-Do List**

Imagine you are hosting a large party for the anniversary of an organisation you know well. Quickly jot down as many tasks as possible required to make it happen.

Ref	Task Description	Done?
1		
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24		
25		

If you have noted a lot of tasks, you may now feel quite organised about throwing the party. A To-Do list is certainly a useful reference which you can ‘tick off’ to check progress towards your goal.

However, there are some key pieces of information that a To Do list will not give you. For example, supposing your list includes the following 5 tasks...

1. Book venue
2. Issue Invites
3. Obtain catering quotes
4. Order catering
5. Decide on guest list

If you had completed tasks 1 and 3, this is not the same as saying you are 2/5ths ready. Not all these tasks are of equal importance. A party without guests is not a party! Until the guest

list is decided, invites cannot be issued, and without inviting people you have not organised a party, you have simply hired a room! Unless you know how many people are going to come, it is unwise to commit to a catering order. You risk overspending or underpreparing if the quantities are significantly misjudged.

There is an inherent optimal sequencing within this set of tasks that a simple list does not tell you. There are also material time variations between the tasks. “Book venue” may be as simple as completing a quick phonecall or may involve completing a complicated online order form. You may need to visit a few venues to select one that is appropriate. Issuing invites on the other hand, could have a long lag before it is fully complete ie you may have bespoke invitations to order, time needed to gather address information, and the time between issuing invites and understanding attendees could be several weeks if people do not send responses back promptly.

2. Turning a to do list into a plan

A PLAN on the other hand would provide and drive out much more meaningful information.

1. **Define** - First and foremost, a plan would have to be clear on its goal. Who/what is the party for? Without this information we would not have detail to know how to proceed. What is the budget available to spend? This information will materially impact the number of attendees and type of venue and type of catering.

Party Name/ Description:

Budget:

Numbers:

2. **Segment - Group/structure the tasks** - Now take a look back through your list. Are there themes you could group the tasks under? . Eg Food/ Entertainment/ Décor. Note them here and split your task list into each group:

Theme 1 –	Theme 2 -	Theme 3 -	Theme 4 -	Theme 5 -

3. **Refine** - In categorising the tasks, you may find that it triggers additional tasks in your mind you had not already thought of. Add them to your list.

4. **Dependencies** - Next, look at the sequencing of the tasks – are there any which are dependent on each other? If so, simply link them with an arrow to show the direction of what needs to follow what.
5. **Order** - If reading the table has become difficult and complicated due to the arrows, you may want to re-write the tasks in the sequential order now on the next page.
6. **Lag** - Next consider any task lag-times. If any of the tasks need more than half a day to complete, mark them with a note of the days lag required. For example, if ordering food, how long before the party do final numbers need to be given? If it was 2 days before the party, you could simply write “t-2”. You may have had to pick the menu a week before. In this case, write “select menu” as a task, with lag of t-7 days.

Theme 1	days	Theme 2 -	Days	Theme 3	days	Theme 4	days	Theme 5	days
-				-		-		-	

7. **Constraints** - Now check there are no additional constraining pieces of information or opportunities to take into account. For example, Bank Holidays to be aware of for posting dates/getting in touch with suppliers? Holiday dates of key people you will need to rely on? If a party is being planned for Spring, can you take advantage in of Easter seasonal sales for any of the supplies? If a previous similar event was held, what worked well, what didn't? Were there any lessons to learn about things to avoid?

Now you have all the information you need to create a plan. The last step is to use a calendar to align the tasks with when they need to happen. In a real life scenario, if it was a big event you would most likely involve others – so you would also need to make sure that you are clear who would own each task.

Planning a complex project or working around limited resources may require further techniques but following these simple steps for any event will at least flesh out the ‘To Do’ list into a much richer, more meaningful and actionable plan.

You can apply steps 1-7 for any project or event. The answers may vary depending upon the context but the process will be valid/ will be beneficial for a variety of situations.

Month:	Month:	Month:
Key tasks...	Key tasks...	Key tasks...

Worked example

NB – there are no right or wrong answers in this type of case study. Below is a potential ‘model’ answer to demonstrate the thinking, but every individual will have their own ideas on content.

In the example below, Laura based her party plan on a 25th anniversary event for her daughter’s school...

Ref	Task Description
1	Contact Parent Teacher committee
2	Agree event theme / style
3	Get catering quotes
4	Select menu option
5	Choose venue – school hall?
6	Invite former teachers
7	Publicise event to former pupils
8	Decorate hall
9	Involve kids
10	Choose date
11	Hire music
12	Finalise numbers for catering
13	Tidy Up
14	Print Tickets
15	Collect Ticket money
16	Buy balloons
17	Review music options
18	Get music quotes
19	

Putting into sequence within table and working out leadtimes provided the following view...

Theme 1 - Comms	days	Theme 2 – Food	days	Theme 3 – Venue	days	Theme 4 - Music	days	Theme 5 - other	days
Contact PTA	t-70	Get quotes	t-35	Choose venue	t-49	Review options	t-56	Print Tickets	t-28
Involve kids	t-42	Select menu option	t-7d	Buy balloons	t-1d	Get quotes	t-56	Collect Ticket Money	t-7
Contact former teachers	t-42	Final numbers	t-2d	Decorate hall	t-1d	Hire music	t-49	Choose date	t-56
Publicise for former pupils	t-35			Tidy Up	t+1d				
Agree theme	t-42								

Notes –

Laura allowed 7weeks notice for teachers, 5 weeks for former pupils, with tickets on sale 4 weeks before. This drove latest dates for finalising the venue and music so that details could be included on tickets and comms.

Adding the task ‘hire music’ identified the need to review the available options and get some quotes first.

Adding the dependency between buy balloons and decorate hall, highlights the need to make sure balloons are available in advance – it would be sensible to change the lag on buy balloons to at least t-2days.

Armed with the information above, Laura’s can now map this to a calendar to identify specific dates for key tasks and ask others to lead on some, with clear expectations set on when they have to complete.

Calendar view...

April	May	June
Contact PTA	Theme agreed, venue selected	Select menu
Music options reviewed	Publicise party	Final numbers, decorate hall
Quotes received	Tickets on sale	PARTY 30 th June