



Steps to Plan Your Project

Date & milestones are approximate and may change depending on the direction of your team and further training or coaching that would be helpful for your team more specifically.

[Skip to: NOT YET COMPLETED SESSIONS](#)

Timeline	Meeting Milestones for Each Project Planning Phase
COMPLETED SESSIONS	
January 18th - 19th	Coaching Meeting A potential agenda: ❖ Connecting bigger issues to local projects - spark idea's in them → go through a campaign we have done before as an example, or go through a solution/problem you are interested in as a team ➢ Coach through different project examples and critical thinking ❖ Intro to Relational/Listening Meetings: ➢ What is a relational meeting & best practices ➢ Practice hosting one (this will come later, not at this meeting!) ➢ Go over a template for emails ➢ We can go to your first relational meetings to show you what they look like ❖ Go through the Purpose & Outcomes for your next meeting ➢ Create an agenda for your team meeting together Outcomes: ❖ List of potential project ideas hopefully weaving in the bigger systemic issues ❖ Action item: watch the Iceberg Model video (22 mins)

	Additional trainings we can offer: ❖ Facilitation Workshop (for all teams) ❖ Intro to Community Organizing: in depth look at 2 previous campaign examples and the project planning process for each. ❖ How to do your own agenda and/or running team meetings.
January 25th - 26th	Team Meeting Purpose: ❖ Discuss & disseminate people to talk to in the community. Each team member should be taking away action items Outcomes: a. Create list of people to talk to in your community i. Relational Meetings Brainstorming Guide b. Disseminate who you will talk to c. Everyone takes away action items to: Consult community through relational meetings: i. Relational Meetings Guide ii. Relational Meetings Template d. Research action items for areas of interest
February 1st - 2nd	Coaching Meeting <i>**This meeting should be 1 ½ - 2 hours long to ensure you have time to achieve all the purposes & outcomes**</i> A potential agenda: ❖ Relational meeting practice ➢ Run through a loose agenda ➢ General notes/tips for meetings ➢ Practice some facilitation skills ➢ Create questions to ask at these meetings ❖ Go through the Purpose & Outcomes for your next meeting ➢ Create an agenda for your team meeting together Outcomes: ❖ A list of general relational meeting questions

	❖ Team feels prepared to run relational meetings ❖ Team is clear on the agenda for their next meeting Action items: ❖ Schedule relational meetings, if you haven't yet ❖ Conduct relational meetings, if any scheduled ❖ Read through the research questions and ask them to do some individual research to answer these, so they can have good discussion on them next week ➢ Also get them to think about: What are the sources of emissions in your community? What is most effective? ➢ Offer list of questions in section below: <i>"Some questions to ask when discussing researching community problems/solutions"</i> ❖ Go through the worksheet and identify the communities you are a part of (as an individual so the conversations at their team meetings are productive!) Additional trainings we can offer: ❖ Facilitation training ❖ Relational/Listening Meetings
February 8th - 9th	Team Meeting **This meeting should be 2 hours long to ensure you have time to achieve all the purposes & outcomes** Purpose: ❖ Debrief any relational meetings (check-in on outreach) ❖ Discuss what you've learned so far & other research to do or people to reach out to to further your knowledge ➢ Identify projects already happening in the community ➢ Take away action items to research solutions in the community based on the relational meetings you have had ❖ Discuss potential project ideas ❖ Discuss which community to do your project in (either your school, neighborhood or your broader community) Outcome:

- ❖ List more people to reach out to to further team's community knowledge (if necessary)
- ❖ Create a list of action items/roles which deepen your understanding of different climate solutions (see questions below for guidance). This might include:
 - Researching climate solution areas of interest based on the relational meetings (if possible!)
 - Creating a second general list of people/orgs you could meet with to learn about areas and potential solution opportunities. If they have several areas of interest, focus on priority contacts in those areas. (you will also want to reach out)
- ❖ List all communities your team is apart of:
 - Use the [Team Community Exercise guide](#) to help your team decide on which community to work in for your team's project
 - If your team feels confident after discussing communities, make a decision on which community to do your project in. (This should be done by verbal consensus and/or taking a vote).

Action items

- ❖ More research (general/relational meetings) on community climate solutions, in order to answer the questions below. Ideally, they have one or more areas of interest, and are doing research more specifically on these problems.

Some questions to ask when discussing researching community problems/solutions (if you don't know the answer you need to do more research!):

- ❖ What has been done previously on climate change? Why did it work or not work?
- ❖ What is currently being talked about? (This can be any issue that the community mentioned during relational meetings or things showing up in the newspaper that ARE NOT related to climate change. Maybe students at your school complain about heating issues or being too cold in certain classrooms. Note that, and then ask the other questions below.)
- ❖ Does the problem relate to climate change? Can it be tied into a solution in any way?

	❖ How does your area of interest tie into your community? Would that solution work there? What does that vision look like? ❖ Who is affected by this climate solution? ❖ Who makes the final decision on this solution happening? ❖ What is the biggest source of emissions in our community? What is the most effective project we can work on to tackle this? What you need to do before this meeting: ❖ Conduct some relational meetings What you need to learn before or during this meeting: ❖ How to think about the communities you're a part of when figuring out how to make change (coaching meeting)
February 12th - 14th	Project Planning Workshop (2 hours) Purpose: ❖ Teach each team the process of choosing a project ➢ Different types of goals: mountaintop vs nested, SMART goals (introduce some mountaintop goals). How to plan strong long and short term goals. ➢ What is strategy? What is a Theory of Change? ➢ Introduce the strategy questions ➢ What are tactics? ➢ What are decision makers? Who holds power? ❖ How to take research and community feedback and turn it into a winnable impactful project ❖ Go through the Project Guidelines ❖ Go through the Strategy Questions doc ❖ Go through the Project Strategy + Tactics doc so that teams know where they're trying to get to. ❖ Explain the iceberg model ❖ Go through the plan for the next few weeks Outcome: ❖ Each team understands the project planning process before entering any team strategy conversations ❖ Team members have a better understanding of projects based on community organizing examples

	❖ Teams have a chance to read through the strategy questions together and ask any questions they have. Take away research or action items based on the strategy sections that they haven't talked about before with their project ideas (Convo's they have after this will be through the lens of these questions) ❖ Each team member has a chance to ask questions of mentors so they can understand the project planning process and be trained accordingly Action item: ❖ Review the guides about these concepts in order to ensure they are fully learned
February 15th - 16th	Coaching Meeting <i>Teams are leading intros, ideally self-facilitating debriefing relational meetings</i> A potential agenda: ❖ Debrief findings on research & relational meetings ❖ Brainstorm potential goals, develop 2 - 4 areas of interest based on your research and relational meetings so far ➢ Talk about using the Iceberg model for these goals to ensure they tackle the largest systemic issues (if possible) ➢ Offer potential project ideas/goals for the team, related to their conversations. ❖ Go through the Purpose & Outcomes for your next meeting ➢ Create an agenda for your team meeting together Outcomes: ❖ Team understands how to create a SMART goal based on research and by learning about bigger movement goals that they can create an actionable project within. ❖ Team has a few potentially project goal ideas ➢ Framing it as trying to articulate a problem could help focus their thinking! ➢ Aim to have a few key areas of focus for the project ❖ Team decides further relational meetings to have or research to take away to further understand the potential project goal ideas ❖ <i>Team understands the problem they are trying to solve</i> What you need to do before this meeting: ❖ <i>Some relational meetings conducted</i> ❖ <i>All relational meetings scheduled</i>

	What you need to learn before or during this meeting: ❖ What an effective goal is, and what the difference between different levels of goals are (Project Planning Workshop) ❖ Understand different areas of climate solutions, and which produce the most emissions and thus can be the most impactful to target (done before the break) ❖ Good familiarity with the iceberg model (they've done this training, it should be reinforced in multiple meetings before) Discussion Questions: Some questions to ask when discussing researching community problems/solutions (if you don't know the answer you need to do more research!): ❖ These should have been discussed already, but come back to them again if you have done more relational meetings. Your answers may change! ➢ What has been done previously on climate change? Why did it work or not work? ➢ What is currently being talked about? (This can be any issue that the community mentioned during relational meetings or things showing up in the newspaper that ARE NOT related to climate change. Maybe students at your school complain about heating issues or being too cold in certain classrooms. Note that, and then ask the other questions below.) ➢ Does the problem relate to climate change? Can it be tied into a solution in any way? ❖ How does your area of interest tie into your community? Would that solution work there? What does that vision look like? ❖ Who is affected by this climate solution in your community? ❖ Who makes the final decision on this solution happening? ❖ What is the biggest source of emissions in our community? What is the most effective project we can work on to tackle this?
February 22nd - 23rd	Coaching Meeting Purpose: ❖ Debrief findings on research & relational meetings ❖ Run through the qualifications for a SMART goal and decide which potential project goal ideas fit into a SMART goal. Adjust accordingly to make them all SMART goals

- ❖ Come up with a list of barriers or questions you still do not know for your project goal idea (*who can you talk to, where can you find this info?*)
- ❖ Read through the strategy questions and discuss what research is needed going forward

Outcome:

- ❖ Try to work through the first section of the strategy questions
- ❖ Start to workshop SMART goal
 - Try to write one based on the team's collective area of interest
 - DON'T need to have completely finished writing their SMART goal, but should have defined a problem area that they want to address
 - (Second time) Offer potential project ideas/goals for the team, related to their conversations.
- ❖ List of barriers and questions for each that project goal

What you need to do before this meeting:

- ❖ Conclude primary relational meetings
- ❖ Conclude preliminary research about climate solutions in your community
- ❖ Each team member has a fairly solid idea of a few projects they'd be interested in working on

What you need to learn before this meeting:

- ❖ What a SMART goal is, why they are important, and how to create one (completed in coaching session)

Potential (if teams are divided on multiple potential project area's):

- ❖ 2 - 4 potential project SMART goals
- ❖ List of barriers and questions for each potential project goal

NOT YET COMPLETED

**March
1st - 2nd**

Goal Setting Meeting

****This meeting should be 2 hours long to ensure you have time to achieve all the purposes & outcomes****

Purpose:

- ❖ To discuss and decide on a team project SMART goal
- ❖ To discuss how your goal can be in line with the project guidelines

	❖ To discuss whether the goal is as deep as it can go: Is it just addressing an issue or a structure? ➤ Workshop your goal using the Iceberg model and try to find a goal that suits your team's capacity but tackles the deepest layer of the problem Outcomes: ❖ Complete part 1 of strategy session questions ❖ Go over the remainder of strategy session questions, and identify what research needs to be done in order to complete them. What you need to do before this meeting: ❖ Completed primary relational meetings ❖ One (or multiple) potential project SMART goals What you need to learn before this meeting: ❖ Learned about iceberg model ❖ Learned about different levels of goals and how to create a good goal (project planning workshop) Potential trainings: ❖ Anti-oppression & Inclusivity ❖ Self care & Boundaries ❖ Recruitment for your project ❖ Event Planning & Social Media
March 8th - 9th	Strategy Meeting (2 hours) Potentially run with multiple teams and facilitators using breakouts Purpose: ❖ A clear Strategy & Theory of Change statement for your goal ❖ Answer most of these questions: Strategy Questions ➤ Which questions can you not answer? Can you take away research to find the answers? What you need to do before this meeting: ❖ Have a SMART goal ❖ Completed section 1 of strategy questions What you need to learn before this meeting: ❖ Know what a theory of change is (project planning workshop)

	❖ Understand what a strategy is, how there can be a variety of different strategies, and how to choose which is most effective (project planning workshop) ❖ Understand how to determine who a decision maker is and how to evaluate their power (project planning workshop) Outcomes: ❖ Decision on a team project goal by a democratic vote ❖ SMART goal is written down and sent to your mentors ❖ The project goal is in line with the project guidelines ❖ A Theory of Change statement for your project ❖ Run through the Strategy Questions and takeaway action items for the ones you cannot answer (for example: further research, etc.)
March 15th - 16th	Project Planning Meeting (2 hours) Purpose: ❖ Fill out the project planning template together! This will be your project's timeline including tactics. ➢ Mentors may need to workshop your team's SMART goal if it seems there is something missing. This will stay in line with what you voted on, but we can offer some critical perspectives if we think another brainstorm is needed! ➢ Mentor-led Strategy session ❖ Clear roles and responsibilities for each team member for your project ➢ These should be: tactic specific roles and team meeting roles What you need before this meeting: ❖ A clear SMART goal for your project ❖ A Theory of Change for your project ❖ Your project falls within the project guidelines ❖ You know the answer to all the Strategy Questions ➢ Most importantly: Opponents, Allies, Barriers, and Our Power sections ❖ Completed a minimum of 10 relational meetings What you need to learn before (or during) this meeting: ❖ Tactics: what they are (definition and examples), what makes one effective, how to choose which to use, how to plan an event ❖ Concept of campaign escalation - examples

	Potential trainings: ❖ Anti-oppression & Inclusivity ❖ Self care & Boundaries ❖ Event Planning
April - May 30	Team Meetings & Coaching Sessions throughout Project ❖ Decide how often you need to meet (usually during a project you don't need to meet every week as you'll be busy doing your roles and tactics) ❖ Continue to meet to ensure everyone is checking in and debrief how the project is going ❖ Mentors can step in and help as necessary (keep open dialogue so we know what is happening!) Potential trainings: ❖ Anti-oppression & Inclusivity ❖ Self care & Boundaries ❖ Recruitment for your project ❖ Event Planning A loose timeline: ❖ Run through your tactics ➤ Host an event, etc. ❖ Decide if strategy or tactics need to be re-done based on how project is going ➤ Re-strategize if necessary ❖ Measure emissions from project is possible ❖ Debrief how the project went! ❖ Celebrate & reflect on the project and program. ❖ Enjoy social time together!
June	Project Ends, Now What? ❖ Debrief how the project went! ➤ Team debrief project ➤ Social celebration! ➤ What's next for us?

	❖ Program Certificates are distributed Outcomes: ❖ BTC collects end of program data via surveys, testimonials, qualitative debrief etc.
--	---