

2014 Rhode Island Land & Water Summit  
**Make a 12-month Work Plan in One Hour**  
*(or How So Few, Do So Much, with So Little)*

We all have too much to do, in too little time, with too few people. Our only hope for long-term success is to make good use of limited resources.

A good first step is to compile a master list of potential events, projects and activities for the coming year. The essential second step is to manage the timing, mix and number of activities to deliver your mission without burning out board members and volunteers. We'll do this on a 12-month timeline.

In this hands-on session, we will draft an action plan for the coming year using events, projects and activities suggested by participants. Our subject "organization" will be an amalgam of the groups you represent.

### Get Ready

- Consider whom to involve in this planning activity.
  - Board of directors
  - Advisors
  - Organizational partners
  - Or, just the executive committee or an ad hoc team to prepare a first-draft for the board
- Create a "Magic Wall."
  - Gather materials
    - 8.5 by 11 blank copy paper (or one-side-blank from recycling bin)
      - White – you'll need about 20 half-sheets per person and about 50 more in reserve
      - A small supply of color paper for headings
    - Ruler with a sharp edge (or a paper cutter)
    - Roll of masking tape
    - Chisel-point marker pens
      - Blue or black – one for every participant
      - Red – one or two
    - Package of one-inch sticky dots
  - Tear/cut the paper into half-sheets – 5½" by 8½"
- Arrange for a comfortable, suitable room
  - Wall suitable for masking tape and free of windows and wall-hangings – 8 to 16 feet long. Even better would be to have two clear wall surfaces adjacent to one another.
  - This could be your normal meeting room, but it would be better to hold this session in an unusual place.
- Arrange for tasty refreshments: *Happy people are creative, cooperative people.*



## Set up the Room

- Clear the wall and set up tables and chairs
- Place at each place:
  - Half-sheets of white paper
  - A marker pen and
  - A few sticky dots of one color
- Keep 50 sheets in reserve
- Tear masking tape into one- to two-inch bits and stockpile them along the margins of the wall
- Using color half-sheets,
  - Label one color with months of the year: one month per sheet
  - Label another color with major categories of events and activities you expect
- On the left-hand side of your blank wall, tape up the category headings randomly
- On the right-hand side of your blank wall, tape the monthly headings across the top

## Get Started

- Preview the process
  - One item per sheet in a landscape (sideways) format
  - Write in big letters so we can read your ideas
  - Don't worry about duplicate ideas; write up every item that is important to you.
- Make agreements on how you will work together
- Clarify any lingering questions and give the group five to 10 minutes of silence to write up a list of planned and potential:
  - Public events
  - Ribbon-cuttings
  - Work days
  - Publications
  - Campaigns
  - Board activities
  - In-house events
  - .....
- Once the sound of markers subsides, ask a volunteer to come to the Magic Wall and post his or her half-sheets under the appropriate categories while describing each one clearly to the group.
- Once everyone has posted their ideas, ask the group to consider what they see. This is an excellent moment to reflect on the organization and the menu of ideas.

## Screen for Priorities

- Highlight with sticky dots or red marker
  - Imperatives
  - Contractual obligations
  - Perishable opportunities
  - Strategic plan priorities
  - .....



## **Create a Calendar**

- Place highlighted half-sheets on a 12-month timeline.
  - Begin with the rock-solid obligations
- Look for ways to adjust the timing and sequence of activities for efficiency and momentum. This is where your board will begin to do some truly strategic thinking.

## **Deal with the Leftovers**

- Compile the items that don't reach the calendar into a Tickler List.
- Some are good ideas waiting for the right time; others will slide into the trash someday.

## **Revisit in Six Months**

- Revisit the calendar at your mid-year board meeting.
  - What's working well?
  - What conditions have changed to disrupt your planning?
  - What adjustments would make the calendar better?
  - What have we learned that will inform our calendar planning for next year?
  - Reflect for a few minutes on how well you are delivering on your mission and taking good care of your people.

## **Important Note about this Powerful Tool**

The Magic Wall technique is useful for myriad purposes. In my work, it replaces flip charts completely. Consider using a Magic Wall any time you wish to generate new ideas, sort, rank and organize next steps.

I will be happy to offer follow-up suggestions on how to make full use of this powerful tool. Call me!

## **Technical Assistance Available**

**The Rivers & Trails Program provides technical assistance to community and regional groups interested in making public improvements related to conservation and recreation, including parks, trails, greenways and stewardship.**

**Requests are due on August 1<sup>st</sup> for assistance beginning in October. Find information and application materials at [www.nps.gov/rtca](http://www.nps.gov/rtca).**

