PROJECT PLANNING

1. Set your **scope**, or the parameters, of your event or program.
   A. Define the **features** of what you are delivering
   B. Define your **budget** and your resources
   C. Establish a **timeline**
2. Set up tasks
3. Execute your plan

1. It is important to set the scope of your project down in writing. This allows you to review it throughout your project as new ideas come up to see if they fit in with the objectives you have set. Possibly the new idea could cause you to go over budget or would cause you to miss important deadlines. "Scope creep" is a common problem on all projects. Having your objectives written down in advance – ***and periodically cross-checking against them as you proceed*** – is an easy way to stay on track.

   A. The first step in defining the scope is to **determine what your "product" (i.e., event or program) should look and feel lik**e. The first things to consider are: What parameters for this event or program have been established by the PTSA Executive Committee or Board? What preliminary budget has been identified by the membership? With this context as your starting point, you'll then need to flesh out the specifics. Consider the following questions: What are we trying to accomplish or achieve with this program? Is this a community event for families or is the focus on the kids? Is it a fundraiser or is it a family fun event that will break even? Will it benefit kids academically or is it something outside of the curriculum? Are you going to emphasize this as a building year or as a changing year? Build the features of your program or event around the answers to these kinds of questions. Once you have this part of your scope outlines, review it with your Executive Committee or Board VP.

   B. Once you've determined what you think your program or event should look and feel like, you need to **establish a functional budget**, taking into account all resources available to you. This budget goes beyond the preliminary budget established for your program by the membership and includes a much more detailed accounting of what your real expenses and projected income will be. Attached you will find a sample budget for the Science Fair. In this example you can see that they've thought of what will cost money and done some research into the cost of these items. Other resources they may list include how many volunteers they have to work with and any free tools they can take advantage of. For example, if Sally Smith has

agreed to donate all the film required to take pictures of each child with their exhibit, this would be considered a resource, and you would not need to budget for buying the film.

If it appears your detailed budget will exceed the amount allotted in the original PTSA budget, you must quickly review the situation with your Executive Committee or Board VP. The Board has the authority to grant budget changes up to a certain, relatively small amount. Any amount in excess of that, must be voted on by the General Membership at a planned meeting. If this is not possible, it may be necessary to go back and revisit parts of the scope of your program or event.

Please note: Standard budgeting procedure in any company or organization does not allow you to budget for expenses in excess of what the approved budget states. You cannot, for example, say that you will spend $500 instead of the budgeted expense amount of $400 because you are planning to raise at least $100 in concession sales.

C. The final step in defining the scope is to **establish a time line**. Most times this is done by backing out your deliverable date. To use the Science Fair as an example again, let's say the Science Fair is scheduled for April 4th. Starting with this date you develop a calendar that allows you to see, for example, what dates information packets need to be sent out on, which lets you see when participation interest slips need to be turned in by, which lets you see when demonstrations need to be done by, which lets you see when you need to start advertising, and so on and so on.

2. Now that your scope is defined you should begin to detail what tasks need to take place from the beginning to the end. Assign an approximate length of time for each task to be completed as well as the person responsible.

3. Execute your plan with regular review periods to make sure that "scope creep" is not occurring, that committee members have not hit any snags and that everyone is staying on target with the budget and the timeline. Stay in close contact with your Executive Committee or Board VP to raise any issues or concerns early. You may be asked to attend one or more Board meetings to review your plans with the committee and answer questions.

Hypothetical Budget – Science Fair

(numbers for example purposes only)

Expenses:	
In Class Demonstrations to Kick-Off Science Fair	$ 50
Science Fair Participants Pictures	$ 90
Certificates	$ 80
Student Interactivities at Science Fair	$ 300
Demonstrations for Science Fair	$ 280
Science Fair Packets	$ 100
Concessions (expense offset by income)	$ 300
Total	$1200

Income:	
PTSA Budget	$ 600
Concessions at Fair	$ 600
Total	$1200

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