08
PLAN

PLAN

Use the tools and resources in this guidebook to accomplish the goals below. Once your design team has achieved these objectives, you will be in a strong position to advance to the next phase in your design process. Use the reflection tools in the **Design Work Journal** to evaluate whether your design team is ready to move to the next phase.

Now that you are moving forward with your idea, use the criteria in this phase to reflect on how innovative your solution is


Discuss whether your solution is desirable to your stakeholders and if it is not, how you can improve it

Imagine how to implement your solution sustainably - Are there funds to support the idea? Will the solution create sustained impact?

Reflect on whether your solution is feasible. Will key decision makers (government, donors, management) support the solution? Does the necessary technology exist?
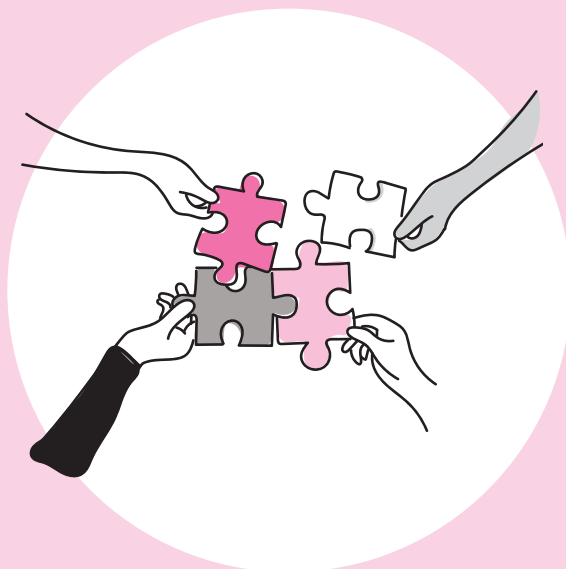
Refine your solution based on the feedback you received from stakeholders and your reflections as a team

Map out the assets of the organisation that can be leveraged to support implementation of the solution

Determine the resources your organization needs to secure in order to implement the solution

Plan the implementation strategy and timeline

PLAN

Now that we have tested our prototype and received feedback from stakeholders, it is time to begin to think about what implementing our solution might look like.

The planning process laid out in this guidebook is meant to help us think in a strategic way about what resources we might need to implement our solution. This process will help our team prepare to pitch to potential funders and partners in order to get them excited about getting involved in the project.

What steps can we take to plan out the potential implementation of the project? How might we keep the stakeholders we are serving and their needs in mindas we move into a strategic decision-making process?

CAPTURE YOUR WORK

PROCESS TIPS

MINDSET TIPS

EQUITY STRATEGY

CO-DESIGN STRATEGY

FIELDWORK

USAID
FROM THE AMERICAN PEOPLE

AGA KHAN FOUNDATION

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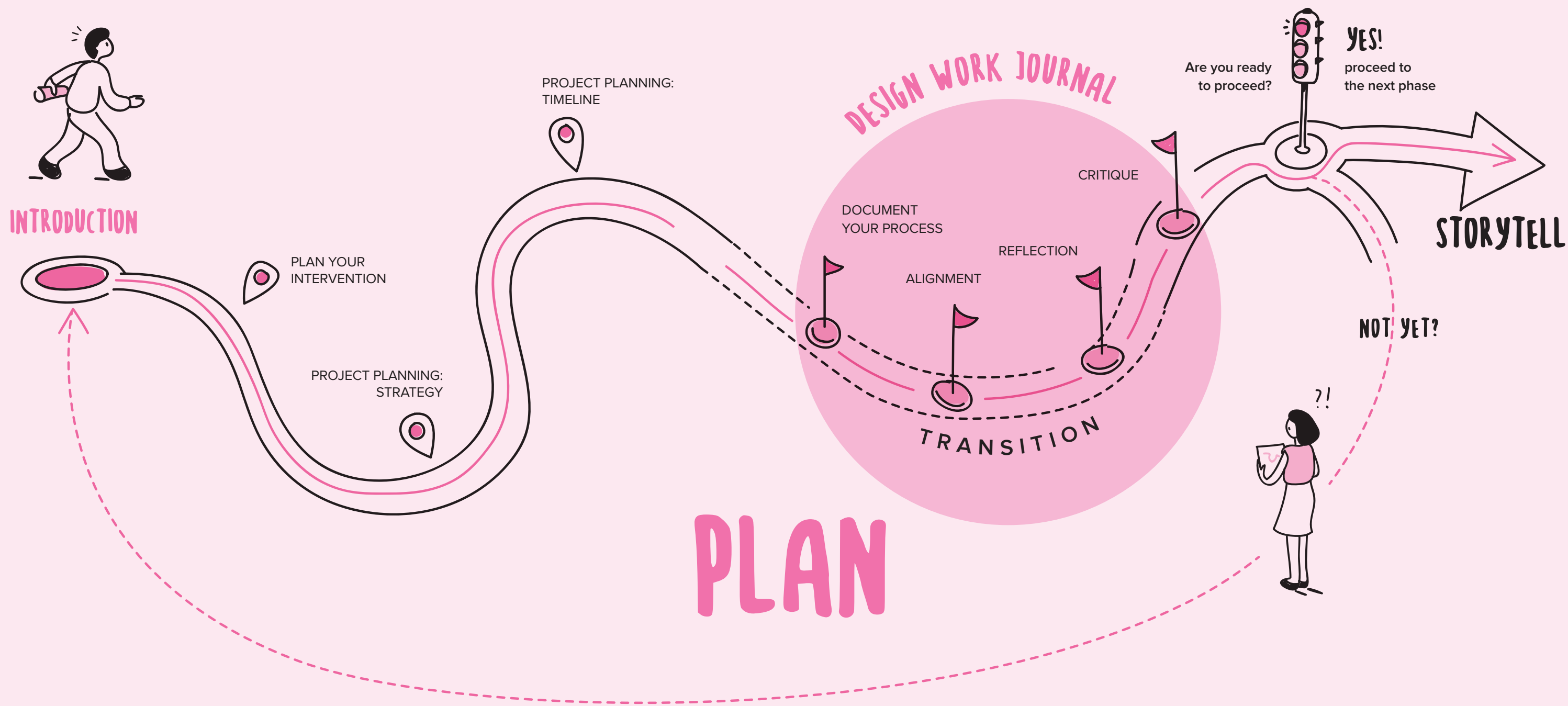
You can find a video lecture as well as more articles on this phase of the **Human-Centred Design** process in the **Resource Book**. You will also find a full demonstration example of each of the tools in there. Scan the QR code to access this resource.

INTRODUCTION

PLAN YOUR INTERVENTION

PROJECT PLANNING: STRATEGY

PROJECT PLANNING: TIMELINE

DESIGN WORK JOURNAL

DOCUMENT YOUR PROCESS

ALIGNMENT

REFLECTION

CRITIQUE

TRANSITION

PLAN

Are you ready to proceed?

YES! proceed to the next phase

NOT YET?

STORYTELL

OVERVIEW OF PLAN PHASE

The tools in the **Plan Phase** are designed to help your team think about how you might implement your solution if you were to receive funding.

At this phase of the design project, you are moving from an idea you are developing to a concept you are working to implement. A concept is a robust idea that has been developed through multiple rounds of prototyping.

OBJECTIVES OF PLAN PHASE

The goal of this phase is to get your design team aligned around what the next steps are to implement your concept. Also, consider your long-term goals for improving the outcomes for your stakeholders.

At the end of this phase, all team members should be clear on what needs to happen next.

MINDSETS OF PLAN PHASE

- Work together to understand the context
- Look carefully to understand potential problems and opportunities
- Start small to make big change

Scan the QR codes on page 26 for the following resources:

- Plan Phase **Mural Template**
- **Design Work Journal** PDF
- Design Work Journal Mural Template

PLAN:
TEAM ACTIVITIES

When you convene your design team, use these hands-on, immersive activities to help build your design skills and mindsets. An important part of these activities is the debrief after - don't forget to make time to reflect on what you learned as a team.

Begin the collaborative session with one the following activities:

HOW TO DRAW TOAST

Goal: This exercise is designed to help participants think through a process or procedure in all of its component parts.

Instructions: Ask everyone to get a piece of paper and a pen. Explain the challenge: Everyone will have 3 minutes to draw the process of making toast (or something else culturally-relevant, like making breakfast). Set a timer for three minutes. Give a warning once every minute. At the end of the three minutes, ask everyone to show their drawings.
Watch Tom Wujec's TED Talk about this exercise.

Online Adaptation: Follow the instructions above. Use a polling tool to capture reflections.

Scan the QR code to Watch Tom Wujec's TED Talk.

Debrief Questions: What did you learn about breaking an idea into its component parts? How does this help you think strategically about implementing the idea?

This phase of the design requires your team to shift from a generative exploration mode into more strategic thinking.

Use this exercise to help your team make the mental shift.

PLAN:
INTRODUCTION TO TOOLS AND METHODS

At the top of each tool description is the recommended amount of time to complete the tool. Try to spend only the recommended time. If you spend significantly less time on the tool you might not do enough rigorous thinking to advance your project. Also, keep up your project momentum by not spending too much time on each tool.

Design Leads should review this page before the design team is scheduled to meet. Take note of opportunities to engage the community and plan for that. Gather needed materials. Take note of fieldwork and help your teammates plan for that work.

Documentation Strategy: Be sure to capture all of your work throughout this process, using the tools provided as the main place to capture your thoughts and reflections. **Remember:** if it isn't written down or captured, you have no evidence of it! Be sure to take photographs and/or screenshots, especially when working with stakeholders and community members. Be sure to ask permission before you take photos of people.

Co-Design Strategy: If you are only engaging with community members as co-designers on a part time basis, the Plan Phase of the process is a great time to engagement them. Inviting community members to join for this exercise helps bring their knowledge of the community into the process.

Equity Strategy: Make sure that your design team is working to identify those stakeholders, communities and organizations who are under-represented, under-resourced and whose voices are not often heard. Consider those stakeholders as you are designing your strategy for implementing your concept.

PLAN: TOOLS AND METHODS

60 minutes

#1 PLAN YOUR INTERVENTION

WHAT IS THIS TOOL?

The **Plan Your Intervention** tool will help your design team transition from an exploratory design mode to implementation mode. This is the time to begin to imagine more concrete, strategic actions your team will need to take in order to implement this idea.

WHAT IS YOUR GOAL?

Transitioning from open-ended design work to implementing an idea requires a significant shift in how the team is working. Use this framework to support that shift to more strategic, tactical thinking.

60 minutes

#2 PROJECT PLANNING: STRATEGY

WHAT IS THIS TOOL?

The **Project Planning: Strategy** tool will help your team transition from an exploratory design mode to implementation mode and map out the next steps required to implement your solution.

WHAT IS YOUR GOAL?

Transitioning from open-ended design work to implementing an idea requires a significant shift in how the team is working. Use this framework to support that shift.

60 minutes

#3 PROJECT PLANNING: TIMELINE

WHAT IS THIS TOOL?

The **Project Planning: Timeline** tool will help your team map out the next steps required to implement your solution based on a timeline.

WHAT IS YOUR GOAL?

Use this tool to break down the implementation of your concept into specific parts with deadlines. When you have completed these tools, your team should be aligned around the next steps needed.

PLAN YOUR INTERVENTION

Instructions: Use this tool to determine the details of your project and begin to draft a plan for implementing your solution.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 251.

Push your team to get specific about the details of your concept.

Now is the time to begin imagining what they would need to do in order to make this idea a real solution that is implemented at scale.

1. TEAM & CAPABILITIES

Take a look at your existing team.

- How are you going to start the project?
- What skills do you need on the team to implement your solution?
- Who would be most essential members of the implementation team? Who will be responsible for leading this project?
- How should the team be organized?
- Are there any specific skills that you are missing in your team?
- Is there a need for consultancies or outsourcing to fill the skills gap?
- Be sure to consider the gender balance of the team.

2. BUDGET

Review your budget options.

- How much will implementing your solution cost?
- What do you need the money for? Consider elements like travel, staff, equipment, developing materials and other items.
- Are you able to generate revenue from the project?
- Where will the rest of the money come from?

3. STAKEHOLDERS & PARTNERS

Gather the key stakeholders for your project and discuss potential partners and key stakeholders.

- Which stakeholders need to participate in the implementation of the solution?
- Are there organizations your team needs or wants to partner with?
- Are they development agencies, civil society organizations or private companies?
- What added value will they bring?
- How will you manage those partnerships?
- What roles and responsibilities will each party have?

4. TIMELINE

Gather the key stakeholders for your project and create a communication plan.

- For this project to be successfully implemented, what do you need to communicate? And to whom?
- Do you need to get approvals from those supervising the project? From external partners?
- Given the key stakeholders you identified, what is your plan for communicating to each group?
- What needs to be communicated in the next month? In three months? In a year? Discuss key dates with your team.

PLAN YOUR INTERVENTION

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 253.

Use these tools to brainstorm everything that needs to be accomplished in order to successfully launch the project. Then, use the tools on the next pages for making specific project plans.

8. RISK MITIGATION

Gather the key stakeholders for your project and discuss the potential risks of the project.

- What could limit the success of your concept?
- For each risk you identified, what strategies could you use to investigate those risks?
- How will you ensure your initiative does not reinforce existing inequalities between men and women (boys and girls), and/or create new ones?
- What must be avoided to ensure that potential unintended harm to people or the planet is avoided when implementing this solution? How might your design team work to ensure these unintended consequences do not become a part of the intervention?

9. MONITORING & EVALUATION

Gather the key stakeholders and M&E experts to collectively map out a strategy for measuring the impact of the solution.

- How will you know if your concept is working?
- How do you plan to measure and evaluate your results?
- Who will help you in this effort?
- What qualitative and quantitative indicators do you want to track and monitor?
- What decisions can be made with those indicators?

10. PROJECT MILESTONES

Gather the key stakeholders for your project and collectively map out a timeline for implementation. Think about the major milestones in your project timeline:

- When will you launch the project implementation?
- What approvals do you need to secure before the launch of project implementation?
- By when will you need to complete the development of any resources?
- When will you kick off a communications plan?

11. TIMELINE

Gather the key stakeholders in your project and collectively map out a timeline for implementation. Brainstorm key dates with your team.

- What needs to happen in the next month?
- In three months?
- In six months?
- In a year?

PROJECT PLANNING: STRATEGY

Instructions: Map out the next steps needed to move from concept to implementation. Possible next steps include: project planning, raising funds, hiring a team, piloting the project, etc. Once you have identified the steps, place them on the timeline below. Some of the tasks may be overlapping.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 255.

*It is a common mistake during the **Plan Phase** for teams to be hesitant to think strategically about their idea. Push yourselves to think concretely about the solution as if it really were going to happen.*

A high-quality concept should excite your team and raise hopes for lasting impact. It is important to consider a concept that the team is committed to implementing.

Step 1:
What?

Who?

Deadline:

Step 2:
What?

Who?

Deadline:

Step 3:
What?

Who?

Deadline:

Step 4:
What?

Who?

Deadline:

Step 5:
What?

Who?

Deadline:

Step 6:
What?

Who?

Deadline:

Step 7:
What?

Who?

Deadline:

Step 8:
What?

Who?

Deadline:

Step 9:
What?

Who?

Deadline:

Step 10:
What?

Who?

Deadline:

Step 11:
What?

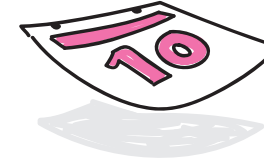Who?

Deadline:

Step 12:
What?

Who?

Deadline:

PROJECT PLANNING: TIMELINE

Instructions: Use this tool to map out key dates and milestones for implementing the project. Label the timeline with months, identify different steps for implementation and break down tasks into small deadlines.

START

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6

PROJECT PLANNING: TIMELINE

CONTINUED -- ⟶ END
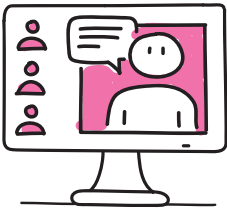
Step 7

Step 8

Step 9

Step 10

Step 11

Step 12

PLAN: DIGITAL TEMPLATES

PLAN: DIGITAL TEMPLATES

All of the **tools and resources** have **digital versions** that will allow your design team to capture your work, share it with others and collaborate while working remotely. Scan the **QR codes** below to access these resources.

#1

PLAN PHASE SLIDE DECK TEMPLATE

Use this slide deck template to create presentations thoughout your design project.

Scan this QR Code to access a slide deck template for the Plan Phase.

#3

DESIGN WORK JOURNAL

Use this PDF of the **Design Work Journal** to capture the most important information from each phase of the design process, as well as reflect on and improve the quality of your design work. Your design team will use the same **Design Work Journal** throughout your project.
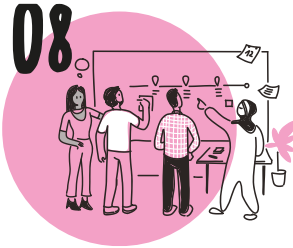
Scan this QR Code to access a PDF of the Design Work Journal.

#2

PLAN PHASE MURAL TEMPLATE

Use this Mural template to complete your team's **Plan Phase.**

Scan this QR Code to access a template in Mural, an online collaborative platform.

#4

DESIGN WORK JOURNAL MURAL TEMPLATE

Use this Mural template of the **Design Work Journal** to capture the most important information from each phase of the design process, as well as reflect on and improve the quality of your design work. Your design team will use the same **Design Work Journal** throughout your project.

Scan this QR Code to access a template in Mural, an online collaborative platform.

PLAN: CHECKLIST
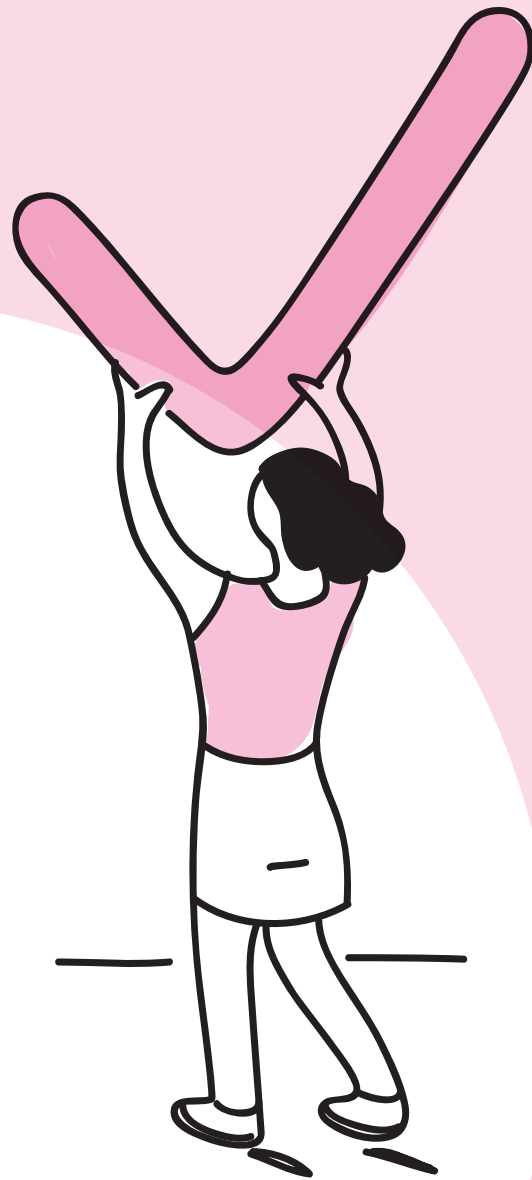
Congratulations on completing the **Plan Phase** of your design challenge. At the end of this step, your design team should feel aligned around how you might go about implementing the solution you have developed.

At the end of every phase of the design process, use the checklist provided to make sure you are making progress and are ready to move forward.

BY NOW, YOU SHOULD HAVE COMPLETED THE FOLLOWING:

☐ Complete the tools of the **Plan Phase** that were listed in your design pathway; depending on your design pathway, you may skip this phase

☐ **Document your work** in your Design Work Journal through pictures and reflections on what you learned

☐ Complete the **Team Alignment** exercises in your **Design Work Journal**

☐ Complete the **Equity Reflection** exercise in your **Design Work Journal**

☐ Complete the **Process Reflection** exercise in your **Design Work Journal**

☐ Use the Process Critique tools in your **Design Work Journal** to reflect on the quality of your design work

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