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## Project Planning: Connecting KNOWLEDGE, ACTION, and SHARING Framework

If you are taking on a project in your school or community, it's good to do it in an informed and strategic way. We like to think of exploring both the **KNOWLEDGE** and **ACTION** we're planning and taking and making sure they match for more sustainable and impactful change. As you take on your project and after you can increase your learning and impact by also **SHARING**.

You can use this model by simply asking the questions to yourself as you go along or you can break it out like a worksheet answering each section's point for your project.

### KNOWLEDGE

#### What do you need to KNOW to organize a successful project?

- **ENVIRONMENTAL/SOCIAL ISSUE – What is it you're trying to change or address?**
  - **What?**

What is the issue you want to address and what is it you want to do about it? What are the facts and stories you should know before proceeding that can strengthen your project and build a team to help you?
  - **Why?**

Why do you care and want to act on this? This can be tied into the “telling your story” aspect of the Fellowship. You can reference the “telling your story” resources and webinar.
  - **Who is already working on this?**

Consider who in your school, community, or outside organizations that are working on this project or issue already. Exploring these resources can give you new ideas on how to tackle the issue at hand, without recreating what has already been done. Know who these people are and what they are doing that could help you achieve your goals!
  - **What can you do about it?**

How do you engage with topic? What solutions are out there and are you choosing the most impactful and effective one for your group?



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- **SYSTEM – What are the systems in which you are working in or trying to change?**
  - **Structures**  
What is in place that supports or limits collective and individual behavior?
  - **Individual & Collective Behavior**  
How are people engaging with structures, policies, values?
  - **Shared Culture**  
Consider the values, perceptions, knowledge of those engaging with this system.
  
- **STAKEHOLDERS – Who should you be aware of or be working with that could impact your project's success?**
  - **Demographics & Roles**  
What roles or people are involved or impacted? Who may you be excluding or not building this project for that could strengthen or diversify what our impact is?
  - **Needs & Concerns**  
What are their needs or concerns? Are there ways you can plan this project so that you can meet some of them? How can your project be a win-win? If you don't consider them, will you create additional resistance for yourselves?
  - **Knowledge & Support**  
What type of support, wisdom, or information can these people provide? Getting advice from people often brings them in to be engaged and more invested in your project, when other times they may not be interested or even against it!
  
- **TEAM – Who are you working with?**
  - **Strengths & Weaknesses**  
What are your strengths and weaknesses as a team? Are there any gaps that you could invite others in to fill?
  - **Resources & Connections**  
What resources could you access as a team? Are there connections that any of you have that could help your success, either through advice or accessing additional resources? Do you have the resources to do this project? If not, how can you get them?
  - **Capacity**  
What level of commitment and time availability do the various people on your team have? Do you need more people or people with different schedules, commitments, or skill levels?



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## ACTION

What do you need to **DO** and be **CLEAR ON** in taking informed action? For this part you bring the **KNOWLEDGE** you collected into your actions and project plan.

- **COMMON VISION – What brings us all together?**
  - **What?**

Do you all have a common vision? What exactly is it? What can we all agree on supporting and standing up for? What do we all want to see happen?
  - **Why?**

Why does this vision connect to our community and team? Be clear on why this project matters.
  
- **GOALS – To support your vision, what type of change do you want to focus on and accomplish?**
  - **Systems & Infrastructure**

Do you want to change any infrastructure (such as social panels, expanded garden's etc)? Do you want to change any systems (removing garbage bins, adding or moving bins, or bringing in reusable mugs, etc)? If so, it is important to know and consult with your stakeholders! (see above)
  - **Culture & Actions**

What shifts in culture or behaviour do you want to see? Know what matters to the people you are hoping to educate and influence and bring in some of our other tools, such as the Integral Model, Engagement Ladder and 5 Ss. Your team could set goals along each of the engagement ladder categories, or even just focus in on one category (consider how you'll evaluate your success here).
  - **Relationships**

Do you hope to build longstanding relationships or collaborations that may go beyond this project or help with its long-term sustainability? If so, state it and make sure you are doing the right actions for those longer-term outcomes. Make sure to go back to the stakeholders questions for this.
  - **Community Engagement**

Do you want to engage certain people? If so, in which way? Many organizations that focus on education collect "engagement numbers." Make sure to clarify if this is something that is important, who you want to engage and how, and track your engagement (through surveys, head counts, enrollment numbers, etc.).
  - **What does success look like?**

For each of your goals, consider what would make the team feel the project was 'successful'. You can set numbers and qualitative goals all along the BTCEA Engagement Ladder or use the integral model to articulate what change you want to see in each quadrant or one quadrant.



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- **THE PLAN – How will you and your team accomplish your goals?**
  - ***Creative Informed Projects***

Give time and space for the group’s creativity to come forth. Consider using your ‘Group Norms’ in giving space for people to ‘Step forward, Step Back’. For the informed part, make sure to bring your ‘knowledge’ into what you are able to do in the time you have.
  - ***Timeline***

Some people work backwards from their final goal, others start from the current day and map what they think is possible.
  - ***Identify Resources***

Map out what resources you have and what you’ll need. Make a plan and delegate tasks to your team to gather necessary resources.
  - ***Team Roles***

Get clear on who’s doing what and how you are taking actions for this project to continue to have long-term impact. Make sure to reference your knowledge on your group’s capacity.
  - ***Sustainability Check***

Are you and your team doing something that has lasting impact? If not, how can you make it have longer standing impact? You could document the process and give it to the next green team, build part of the project into a teacher’s class that will then want to do it next year if it’s successful, or add an infrastructure change that will help shift people’s behaviour over the long term, etc.
  
- **IMPLEMENTATION – What do you need to remember as you execute your plan?**
  - ***Document***

Look at your goals – how will you be recording what you need to assess if you were successful? Record the numbers you are wanting to track, ask the questions you are curious about during the project and take pictures. You will be happy you did that along the way, instead of trying to remember and recreate the moments later when you want to share the experience, impact, or do the project again.
  - ***Persevere/Adapt***

Things normally don’t go as planned, be prepared and be ready to be flexible and problem solve through what shows up. The best leaders bring forth a combination of being prepared, relational, and adaptable, making the most of what arises.
  - ***Stay reflective***

Sometimes we have little wins and things calling for our attention along the way, but we are too busy to acknowledge or even realize it. Don’t forget to take note of what’s happening around you, celebrate, look up and see what’s going on around you, in your community and with your own progress.



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## SHARING

How can you effectively **SHARE** your stories, impact, and learning to inspire others, and create greater sustainability and support for this project and future ones? If people know the impact your project had they will be more likely to support future projects and take action themselves.

- **WHO – Do you know who you want to reach and who will be able to reach them?**
  - ***Which Stakeholders***

Who would you like to, or need to, share your impact with? Looping back to the KNOWLEDGE you gained on who the stakeholders for this issue and system are, consider sharing with them! To be more effective, knowing who your audience is will help with WHAT and HOW to best communicate with them and inform the types of sharing it would be best to create.
  - ***Appreciations & Updates***

Which of your stakeholders should you be thanking and informing on the progress or challenges faced? This will build relationships in a way that everyone can feel good about the work that happened and also these people may be more likely to support yours or others projects in the future.
  - ***Team & Legacy***

Who on your team has the time, skills, and networks to take on the various aspects of effective sharing? Do you have a team member that will be staying with the project or team longer that can hold on to the documentation for future groups to continue or do it again? If not, who could hold on to or ensure that it's passed along?
  
- **WHAT – Are you clear on what your communicating and why?**
  - ***Your Common Vision***

Make sure your communications are framed in steps towards your common vision. What values and types of stories should be conveyed to impact the people you are wanting to impact? Why is your vision important?
  - ***Evaluating what worked, what didn't, and what your "successes" were***

Go back to your goals and how you defined success. What was accomplished in infrastructure change, building relationships, community engagement, actions and culture change? Is there anything that you learned along the way that others could benefit from knowing? That could benefit you in the future to record and keep safe for future dates?
  - ***Your Story***

Together as a team a series of events happened to get you to where you are today. We've talked about the power of stories to reach people that otherwise may not care and also how stories often stick with people longer than numbers, charts, or even results. Consider how you individually or collective have a



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story  
to tell  
and  
what

exactly that story is.

- **HOW & WHEN – How and when will you convey your impact?**

- ***The Medium Used***

What is the best way to share your story and impact? There are many creative ways you could share your story that could leave an impact with the audience you choose to share it with. You could write a report, make a video, a poster, a presentation, or a combination of things that you could share with your desired audience. Get creative and remember who your audience is and what you want your impact on them to be.

- ***Your Tools***

Use your 5 Ss and story templates for effective sharing. You can also look up how other people have shared their impact and use it for inspiration.

- ***The Timing***

Stakeholders often like updates and thank yous in a timely manner. It's also easiest to create and distribute your sharing when you and your team are still inspired, and the information and experience is fresh. Also consider what else may be happening that you can piggyback your sharing onto such as Earth month or week, a special event, staff or Board of Trustees meetings, etc.