



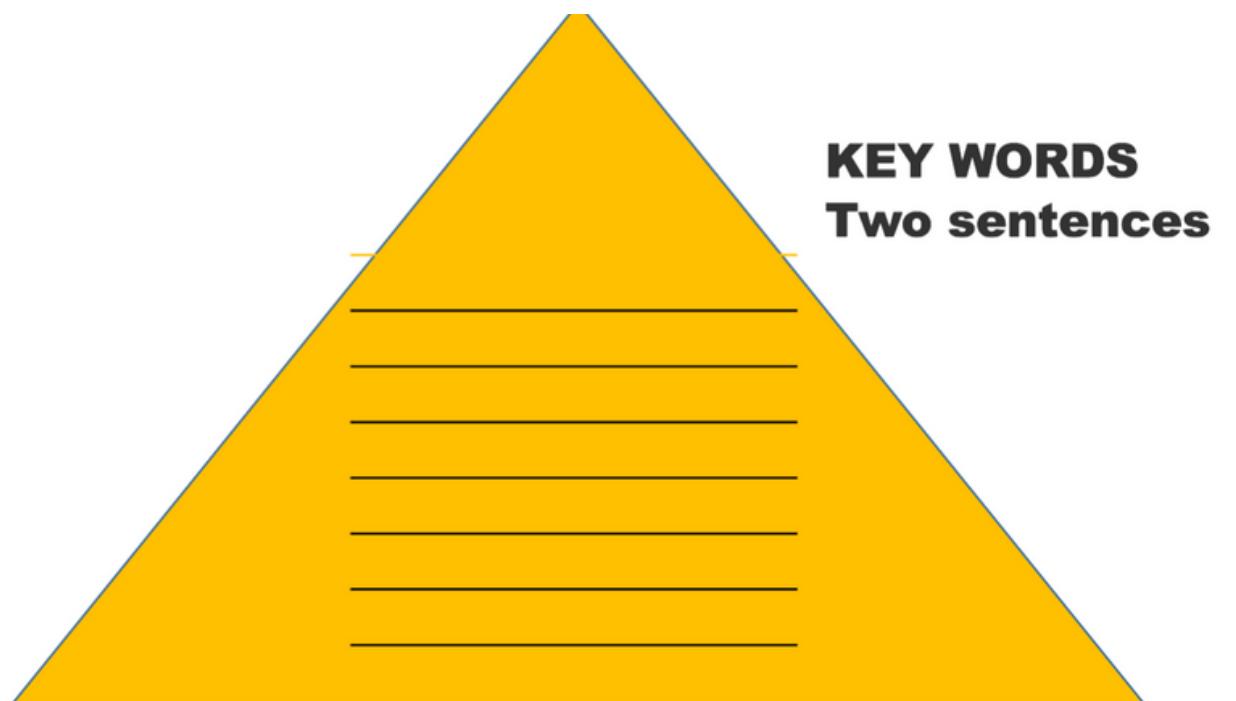
Meet the Funders
Transformation Cornwall and Diocese of Truro

Project Planning and Vision Setting Workbook

Our Vision Is

- Clear
- Concise
- Future
- Challenging
- Inspiring
- Stable

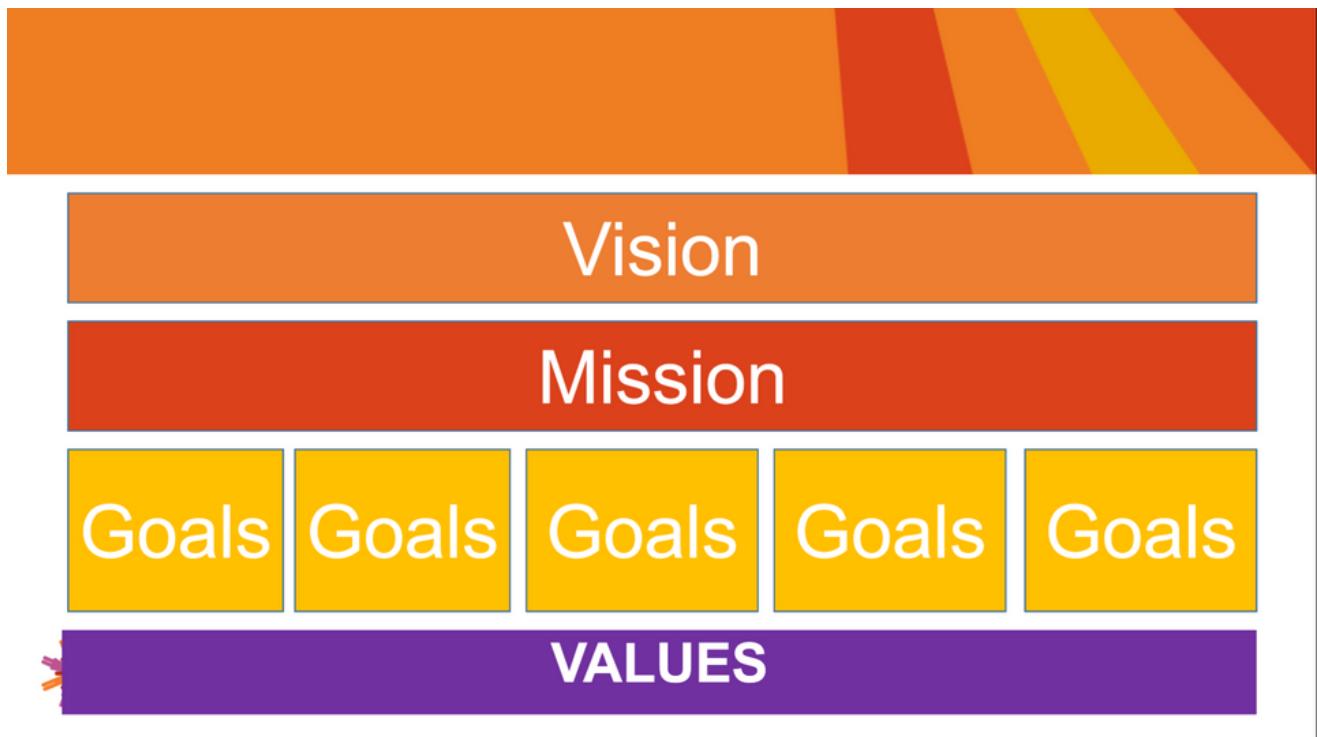
Write Key Words in Triangle



Vision , Mission, Goals, Values and Objectives



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Vision , Mission, Goals, Values and Objectives

Vision: the 'bigger picture' and provides:
* cohesion * inspiration * purpose.

Key words that should be in our vision are

.....
.....

Mission Statement: a broad statement of what the organisation will do in pursuit of its vision. Key words that should be in our mission statement are

.....
.....

Values: the underpinning beliefs of the organisation, in relation to the work to be done. Our key values are

.....
.....

Goals: Aims tangible aims and outcomes that are measurable and achievable to get to the vision. Our goals are

.....
.....



Successful Project Management

6 Step Project Management

1. Idea and Vision

What is the issue we are trying to address?

- Who are our beneficiaries?
- What do our beneficiaries have to say about our idea?
- What will our project achieve in the broadest terms?

2. Objectives and Outcomes

Requirements of the project

- Map out the story of the project and its users
- Identify the deliverables required for the project
- Examine any 'pain points' that might affect your project

3. The Project Plan

What will the project look like

- Map tasks against timescales
- Assign workstreams and tasks within team
- Define budget and funding requirements

4. Funding

Successfully funding the project

- Identify funding sources
- Set funding targets and timelines
- Seek advice from Transformation Cornwall/Diocese if necessary

5. Execution

Rolling out the project

- Consider a small scale rollout of your service at first
- Keep communicating with your users and community
- Repeat this cycle for any alterations to the project

6. Follow-Up

Evaluating your project

- Is the project delivering on its vision?
- Are we within budget?
- How can it be further improved?

Project Planning Workbook

Outcomes	Beneficiaries	Change/Impact

Skills/Resources We Have	Skills/Resources We Need	Connections



What is your timeline and where are the milestones?



What are our contingencies or Plan B?



Example Skills Audit

Skills, expertise, knowledge qualifications	Level of Expertise				Comments
	1	2	3	4	
Administration					
Board/committee experience					
Campaigning					
Change management					
Charity/voluntary organisation governance					
Conflict resolutions					
Customer care					
Digital					
Enterprise/business development					
Facilitating meetings					
Finance					
Fundraising					
HR/Training					
Income generation					
Influencing					
IT/systems					
Leadership					
Legal					
Listening					
Marketing					
People management					
PR/communications					
Presentations					
Project management					
Property					
Relationship management					
Risk management					
Service user/beneficiary of the organisation					
Strategic management					
Team development					
Voluntary sector experience					
Other (Specialist experience or qualification relevant to voluntary organisations e.g. medical, campaigning, advice, etc.)					

