

Locality Evangelization Planning Tasks

LOCALITY EVANGELIZATION PLANNING TOOL

Below is one proposed list of planning tasks for Locality Evangelizations Planning. These tasks can easily be adjusted depending on how the locality maps out its planning process. For the purposes of this list of tasks, we have assumed the Project Sponsor is the RC Director (RCD). You can also use this helpful Excel [TOOL](#) to help map out the schedule.

TASK	ACCOUNTABLE
Detailed Phase Steps	
Phase 1: PREPARE FOR PLANNING	
Discuss Plan SCOPE and APPROACH with RCD	Planning Coord
Decide with RCD who should be on the Planning team	Planning Coord
Verify commitment from Planning Team	Planning Coord
Finalize timeline & high level planning scope, approach, timeline with RCD	Planning Coord
Establish Kick-Off Date/Put Time on Calendar	Planning Coord
Prepare for Kick-Off/Vet with RCD	Planning Coord
Final Walkthrough for Kick Off and Other Planning Dates	Planning Coord
Conduct Kick off with Planning Team	Planning Coord
OUTCOMES: A Plan for the Planning Process	
Assumptions for Phase 1: The best way to figure out the approach is to talk it through with another person(s); securing buy-in on the scope and approach is essential. Knowing the work that the team is committing to is also a critical factor.	
Phase 2: DISCERN OUR APOSTOLIC MISSION	
Discuss the steps of this phase with the RCD and scope of the SCAN	Planning Coord
Discuss the SCAN timeline and details desired including team leads	Planning Coord
Revisit the Mission/Purpose with RCD	Planning Coord
Discuss Vision -- is there one? Is a new one needed?	Planning Coord
Discuss any preconceived priorities prior to meeting with the team	Planning Coord

Review the Placemat (as the OUTCOME of this PHASE)	Planning Coord
Plan for Session with Team -- and Conduct final review	Planning Coord
Conduct this "Set the Foundation" Session(s)	RCD

OUTCOMES: Strawman of the Placemat

Assumptions for Phase 2:

The Mission is clear; the Vision is clear by the end; an internal/external scan will be conducted to ensure relevance to the plan; the team is heavily involved in some part of the SCAN and analysis; the SCAN will provide at least 80% of the clarity of your priorities.

Phase 3: DEVELOP THE PLAN

Validate the Strawman with the RCD	Planning Coord
Follow up with RCD with any additional Inputs Required	Planning Coord
Design Next Session for this Phase and vet with RCD	Planning Coord
Finalize Detail Design and Materials, Tech Design, etc.	Planning Coord
Conduct final walk through with RCD	Planning Coord
Execute Session(s)	Planning Coord

OUTCOMES: 12-18 Goals that align with the Vision and Priorities; Draft Action Plans

Assumptions for Phase 3:

The strawman (placemat) is 80-90% complete and validated before you begin. The team comes prepared to establish what is imminently needed for the next 12-18 and to create action plans (perhaps at the month to month level) around those priorities/goals. This phase is expected to take longer than the previous ones and best as a working session.

Phase 4: LIVE THE PLAN

Agree upon the follow up/status schedule and approach with RCD	Planning Coord
Design Status Sessions (team and 1:1) and vet with RCD	Planning Coord
Review Inputs and Expectations/Approach with designated leader(s)	Planning Coord
Finalize Detail Design and Materials, Tech Design, etc.	Planning Coord
Conduct final walk through with RCD	Planning Coord
Execute Session(s)	Planning Coord

OUTCOMES: Quarterly Status Report -- Planned vs Actual

Assumptions for Phase 4:

The plan is planned out by at least quarters; everyone is clear about what they committed to in the plan; a mechanism is in place to easily capture/report progress. It is helpful to have a rolling 30-60-90 Day view in meetings as well as the Planned vs Actual on milestones or goal targets