Session 3: Work Planning and Setting SMART/Sprint Goals (13:00–14:30)

Objective

Translate big-picture ideas into concrete plans. Learn to break down an agroforestry project into manageable components and set both long-term and short-term (Agile "sprint") goals. Participants practice developing a Work Breakdown Structure (WBS) and formulating short-term objectives from a long-term vision linked to the theory or change.

Key Topics

Project Phases Overview

Begin by revisiting the standard project lifecycle phases – Initiation, Planning, Execution, Monitoring & Control, Closure – and map them to agroforestry. For example-

Initiation: site selection & stakeholder signup;

Planning: designing the agroforestry system & schedule;

Execution: planting trees, training farmers;

Monitoring: tracking tree growth and community feedback;

Closure: final reports and handover.

This reinforces where we are in the process (we are moving from Initiation into Planning now). You can illustrate this with a simple timeline on a slide or flipchart.

Work Breakdown Structure (WBS)

Introduce the WBS as a critical planning tool for organizing work. A **WBS** https://www.mindmeister.com is a hierarchical breakdown of the project into **phases → deliverables → tasks**. Explain how it helps **"chunk"** a multi-faceted project into smaller, actionable pieces so nothing is overlooked. Use an agroforestry example to demonstrate:

- *Phase 1:* Project Initiation (deliverables: stakeholder map, project charter)
- *Phase 2:* Site Preparation (deliverables: site survey, land prep)
- *Phase 3:* Planting or seeding (deliverables: seedlings sourced, planting completed)
- *Phase 4:* Monitoring & Maintenance (deliverables: quarterly reports, maintenance runs). Each deliverable can be broken into milestones following specific tasks. For instance, *Planting* might include tasks: "Train planting team," "Dig planting holes," "Plant trees/shrubs," "Install fencing." Mention that each task will later be assigned to someone and given a timeline. The WBS focuses on *what* has to be done, not when or by whom (that comes next).

Creating a WBS: Best done as a tree diagram or outline. Note that there are templates and mind-mapping tools (e.g. **Mind Meister**) that help create WBS diagrams easily. The key is to be comprehensive but not over-detailed; typically 3-4 levels deep is enough for small projects.

Gantt Charts & Timelines

Once tasks are identified via WBS, a **Gantt Chart** https://www.ganttproject.biz/ is used to schedule them over time. Show or draw a simplified Gantt chart: a calendar view with bars representing task durations, possibly overlapping. Explain elements: tasks, start/end dates, durations, dependencies (e.g., " tree protectors or fencing

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must happen after planting"). Gantt charts help visualize the timeline and ensure a realistic schedule. Mention free tools like **Gantt Project** (open-source software) or even Excel/Google Sheets that can be used to create simple Gantt charts.

Agile Planning – Sprints

Contrast the above "waterfall" style planning with an **Agile** approach. Agile is iterative, instead of planning everything in detail upfront, the project is executed in short cycles or **sprints** (e.g., 2-week or 1-month cycles) with continuous learning. In agroforestry, agile can be useful during implementation when adapting to new information (for example, if a certain tree species is not thriving, adjust in next sprint). Introduce the idea of a **sprint goal** – a short-term objective that contributes to the longer project goal. For example, a sprint goal could be "In the next 2 weeks, prepare 5 hectares and plant 500 saplings of species X." Agile does not replace long-term planning but complements it by encouraging flexibility.

- Use an analogy: The **SMART long-term goal** sets our destination, and **sprint goals** define the next steps on the path. We need both – a compass and a map that we update as we go.

Linking to Theory of Change

Ensure participants see how the breakdown of tasks and short-term goals still ties back to the Theory of Change and ultimate outcomes. Each task or sprint should ideally link to an outcome in the theory of change (e.g., planting trees leads to increased carbon sequestration).

Activity – Building a WBS and Timeline (45 min)

Now let teams apply these concepts. This exercise can be done in small groups (4-6 people each) with flipcharts or using a laptop with a template:

1. **Define the Project:** Assign each group a sample agroforestry project (or let them choose one they are interested in). For example: *"Establish a community food forest on 10 hectares"*, or *"Integrate an agrisilviculture practice alley cropping (trees + crops) on a 50 ha arable farm"*, or even use one of the earlier case examples like the Netherlands living lab.
2. **Create a WBS:** Give groups 15-20 minutes to draft a Work Breakdown Structure for their project on paper. They should identify 3-4 major phases and then break down a few key tasks under each phase. Trainers should circulate to assist. Encourage them to think of all critical tasks (obtaining permits, training farmers, site prep, etc.).
3. **Develop a Timeline:** Next, have them draw a simple timeline (e.g., a horizontal line divided by months or quarters) and place their tasks/phases along it (~10 minutes). They should estimate what happens in sequence and what can happen in parallel. If possible, identify any dependencies (e.g., "must finish site prep before planting starts in spring"). They do not need software – rough hand-drawn Gantt-style timeline is fine. Alternatively, if a projector and a prepared Excel/Gantt chart template are available, one group could demo populating it live.
4. **Set a Sprint Goal:** Now ask each group to imagine they are following an Agile approach during execution. What would be a sensible 2-week "sprint goal" at some point in their project? (5 min) For instance, in the forest farming such as food forest project, a sprint goal could be "Organize community volunteer day to plant 100 fruit trees in Plot A and install drip irrigation." They should ensure it's Specific and Achievable in that short time frame.

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5. **Group Presentations:** Give time to each group to briefly presentone aspect of their plan – either their WBS outline or their timeline and sprint goal (each group 2-3 minutes). Encourage others to ask questions or offer suggestions.

Debrief Discussion: Highlight how breaking the work down made the projects feel more manageable. Did they recall any tasks they might have forgotten without a systematic approach? Also, discuss how setting a short sprint goal can help motivate the team and reveal issues early (e.g., "We realized we needed more volunteers to meet our 2-week planting target – better to know that early!").

Tips for Success:

"Use free online tools to simplify planning." For instance, Trello https://trello.com/ can serve as a simple task board, and Gantt Project or Google Sheets can help track timelines. Demonstrate or describe Trello: tasks as cards that move from *To-Do* to *Doing* to *Done*, which is great for Agile workflows.

Develop a Resource Allocation Matrix alongside the plan (a table listing each task with required resources: people, materials, budget). This helps ensure you have the right resources at the right time. (Note: A RACI chart could also be introduced here to assign Responsible/Accountable persons to tasks in the WBS, but it might be advanced for some. If participants are comfortable, discuss how a RACI matrix would assign roles for each major task in their WBS). https://www.teamgantt.com/blog/raci-chart-definition-tips-and-example

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