PLANNING TEAM BINDER GUIDELINES

Planning Team Binder for the second session contains the following:

- Within each tactic section is the following in this order:
  - Cover Letter*
  - Plan 1*
  - Cost-benefit 1*
  - Plan 2*
  - Cost-benefit 2*
  - Continue through all plans for that tactic
  - Research reports

At the end of this meeting, you’re either done or you’re planning to meet one more time to finish up.

COVER LETTER GUIDELINES

The purpose of the cover letter to the Planning Team is to tell the story of the work your team did throughout all of the meetings. It should be approximately a page and include the following:

- The tactic your team addressed
- Any operational definitions you think the Planning Team might need (e.g., you narrowed a term to one specific part of the definition)
- Significant decisions or things your team considered along the way that influenced your outcome
- A high level review of the Action Plans (e.g., how they relate to each other)
- Why it is important for the Planning Team to accept your plans (how they support the mission & objectives)
- Thank them for their time and effort in considering your plans

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PRESENTATION GUIDELINES
The purpose of the presentation is to walk the Planning Team through the work that you did as a team. The Planning Team will have had your cover letter, research reports, Action Plans and Cost Benefit analyses to review for about a week but that is pretty overwhelming! Consider the following when planning your presentation:

- Clearly explain how your group interpreted the tactic. You can use some of the initial analysis info here.
- Discuss how you arrived at your results statements. You can tie this into outside resources you found especially helpful from the research.
- Discuss how the plans fit together – which might come first, second, etc.
- Make a case for why the plans are so important
- If there are any which are ‘resource rich’ you should explain how the benefits outweigh the costs
- Make it clear how the plans support the mission and objectives

Remember all you know about adult learning theory.
- Limit how much you include on a slide and add detail in what you say – people need to see and hear to understand
- Use quotations, video or still pictures to make it interesting. Explain any jargon or educational terms you use.
- Determine the 3-4 main points you want the Planning Team to remember and focus on those
- Start with a quick overview and end with a summary using your main points. Don’t read the slides word-for-word!

*STRONGLY RECOMMEND: The powerpoint provided is just a guide to get you started. At least change the background & fonts to make it unique…otherwise your planning team will see the same slide show several times on day 3 & nothing will stand out to them.

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