

Compass for Project Planning

The below table is designed to help you think through each step of your program, regardless of where you are in the process. It highlights key actions, important considerations, and points to helpful tools and templates in the Roadmap. You do not need to follow the table in order; you can start with the sections that best match your current needs and skip around as needed.

The table is meant to be used actively—print it out, make notes, and use it in meetings to guide discussions and next steps. The table is available as a standalone document and is also [accessible online](#), including on mobile devices for convenience.

Current Location	Route Overview	Key Milestones and Decision Points	Navigation Tools and Resources
Reflecting prior to startup	<p>Before meeting with partners and starting activities, take time to reflect on the issue that you're trying to address.</p> <p>All partners should work through questions together and reflect on the problem and co-design the project.</p>	<ul style="list-style-type: none"> • What deeply matters to you, and how does it connect to the issue you want to address? • What is your current understanding of the issue, and what gap or need are you hoping to fill? • How does our community currently understand or experience this issue? • What does meaningful success look like in this effort? • Who can support or collaborate with you to make this vision a reality? 	<ul style="list-style-type: none"> • Section 3.0: Planning for Lasting Impact • Section 3.1: Building a Program to Last • See Program Planning Worksheet • See SMART Goals Template • See SWOT Analysis Template • See Community Pulse Survey
Engaging early with intention	<p>Building trust and collaboration from the start ensures that the research addresses the community's most important issues and encourages continued teamwork.</p>	<ul style="list-style-type: none"> • Listen to the community and find shared goals. • Build relationships with trusted community leaders and groups. • Be open about the project and involve partners in planning from the start. • Be transparent about what research can offer, what participation will look like, and how decisions will be made. 	<ul style="list-style-type: none"> • Section 1.3: Why does Community Engagement Matter? • Section 4.2: Identifying a Program Partner • Section 4.5: Establishing Goals and Metrics • See Preparing for Community Partnerships Checklist • See Community Demographics Template
Identifying the question and refining the problem	<p>Finding a specific, focused question can help guide the program as it solves a problem or fills a knowledge gap.</p> <p>Program collaborators may already know the problem they are trying to solve--asking these questions may help refine it.</p>	<ul style="list-style-type: none"> • What specific problem, challenge, or unmet need is our community experiencing? • How can this question be more specific? • How will the question be measured? • Are there resources available to solve the problem? • What are the goals of the program, initiative, or event? 	<ul style="list-style-type: none"> • Section 1.3: Why does Community Engagement Matter? • Section 3.0: Planning for Lasting Impact • Section 4.0: Building the Program Framework • Section 4.1: Partnering with a Community • See SMART Goals Template • See Community Pulse Survey • See SWOT Analysis Template

<p>Designing the program</p>	<p>A well-designed initiative, large or small, involves creating a detailed plan that outlines how it will be run. Answering key questions can help guide the design process.</p>	<ul style="list-style-type: none"> • Who will participate, and how will we ensure they represent our community? • What ethical considerations and protections are needed for participants? • What resources, strengths, and partnerships can support this effort? • How will the program operate, including data collection and evaluation? 	<ul style="list-style-type: none"> • Section 3.0: Planning for Lasting Impact • Section 4.0: Building the Program Framework • See Program Planning Worksheet • See SMART Goals Template • See Gathering and Displaying Program Data Information Sheet • See Communications Plan Template
<p>Organizing resources</p>	<p>Programs require funds for staff, equipment, and participant compensation, and may receive funding through grants, foundations, or grassroots fundraising. Collaborators must plan how to best use those funds.</p>	<ul style="list-style-type: none"> • What resources and tools (such as: staff, equipment, and materials) are needed, and how will we budget for them? • How will we monitor spending and address potential challenges (like supply delays) to stay on track? 	<ul style="list-style-type: none"> • Section 3.0: Planning for Lasting Impact • Section 3.5: Adjusting to Change • Section 3.6: Budget and Financial Planning • Section 4.2: Building a Team • Section 5.2: Distributing Program Supplies • See Program Planning Worksheet • See SWOT Analysis Template • See SMART Goals Template
<p>Collecting information</p>	<p>Programs gather the information needed to answer their research questions. This involves using the methods and tools established when designing the program.</p>	<ul style="list-style-type: none"> • Decide how you'll collect data—like surveys, interviews, or observations. • Train your team, test your tools, and make a schedule. • Check your data as it comes in and write down any changes or problems. • Keep private info safe and store everything in a clear system. 	<ul style="list-style-type: none"> • Section 4.5: Understanding Research Requirements • Section 4.6: Determining Data Needs • Section 5.5: Collecting Data and Monitoring Progress • See Community Pulse Survey • See Gathering and Displaying Program Data Information Sheet • See Community Partner Feedback Survey
<p>Understanding the data and sharing what you learned</p>	<p>Once the data is collected, examine it to find patterns, test ideas, and draw conclusions. Communicating results ensures program findings reach the right people, such as community members, policymakers, or the broader public.</p>	<ul style="list-style-type: none"> • Fix mistakes and remove incomplete answers. • Find trends, common ideas, or differences in the data. • See how the data helps you understand your topic—or shows you something new. • Decide who needs to hear your results. • Use charts, graphs, or pictures to make your data easy to understand. • Share your findings through presentations, posters, websites, or social media. • Protect people's privacy and give credit to those who helped. 	<ul style="list-style-type: none"> • Section 4.6: Determining Data Needs • Section 5.5: Collecting Data and Monitoring Progress • Section 5.6: Gathering Feedback and Sharing Updates • Section 6.2: Reflecting • Section 6.3: Sharing Finding and Results • See Gathering and Displaying Program Data Information Sheet • See Community Partner Feedback Survey • See Program Reflection and Debrief Worksheet
<p>Reflecting and improving</p>	<p>Reflection strengthens future research, builds strong partnerships, and develops a culture of learning and growth.</p>	<ul style="list-style-type: none"> • Check if your program met its goals. • Get feedback from everyone involved. • Talk about challenges and solutions. • Note successes and lessons learned and share them. • Celebrate and thank your team. 	<ul style="list-style-type: none"> • Section 6.2: Reflecting • Section 6.3 Sharing Findings and Results • Section 6.4: Maintaining Relationships • See Program Reflection and Debrief Worksheet • See Community Partner Feedback Survey • See Community Pulse Survey • See Gathering and Displaying Program Data Information Sheet