Creating an Implementation Plan

Why Planning is Essential

- Aligns coalition staff and stakeholders on mission, vision, and goals
- Ensures coalition activities are designed to create mission impact
- Enables coalition to develop strategies to build capacity and resources needed to achieve goals
- Ensures resources are assigned and used effectively and efficiently toward mission impact
- Helps clarify team roles for implementation
- Provides detail to support realistic project timelines
- Provides a baseline to show accomplishments

Other reasons for planning?

Why is planning sometimes deprioritized?



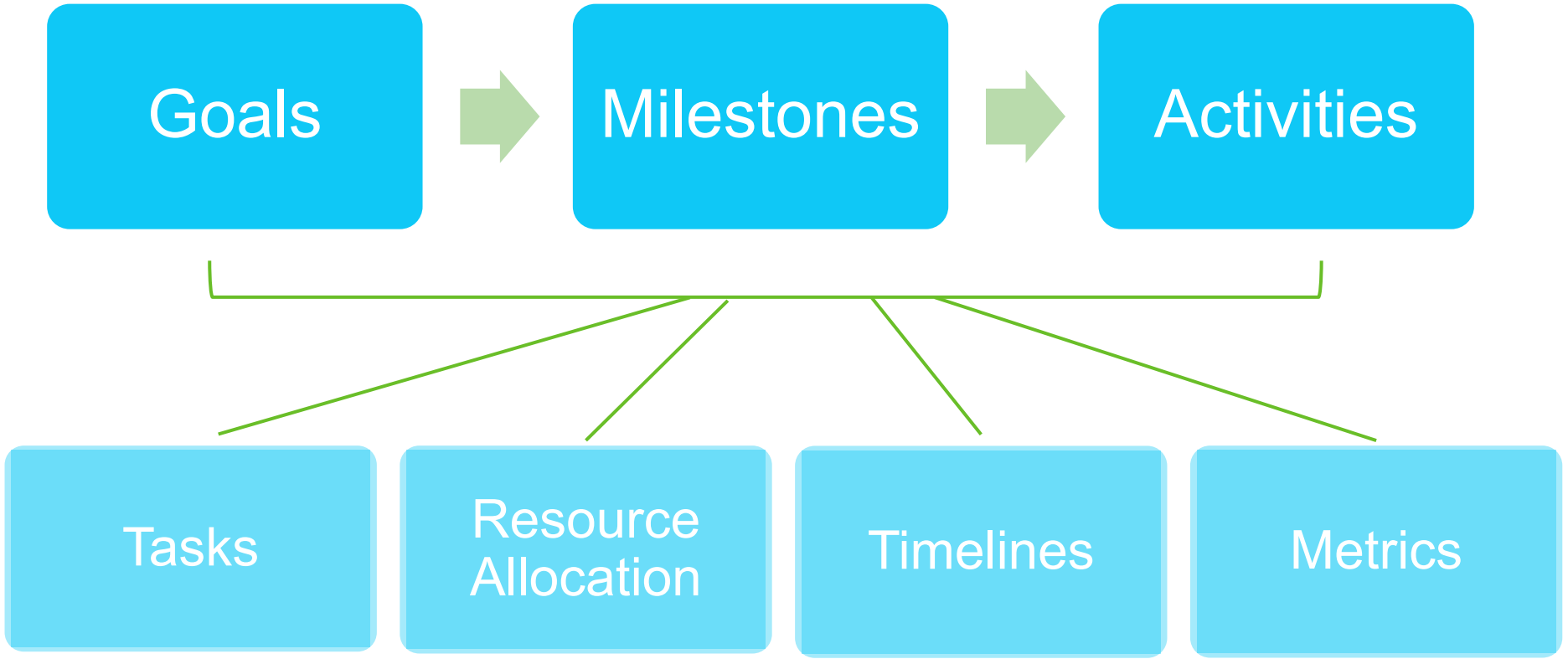
Examples of Planning Documentation

- **Transportation energy landscape:** Comprehensive profile of local transportation systems, energy use, and market dynamics.
- **Strategic plan:** Documented strategies for achieving coalition mission impact in the medium- or long-term (approx. 2–5 years). Communicates multi-year organizational goals and activities to achieve those goals.
- **Annual plan:** Documented annual coalition goals and objectives, activities, and milestones. Can include details such as staffing and resource allocation.
- **Other** detailed documentation of how coalition will achieve mission impact.

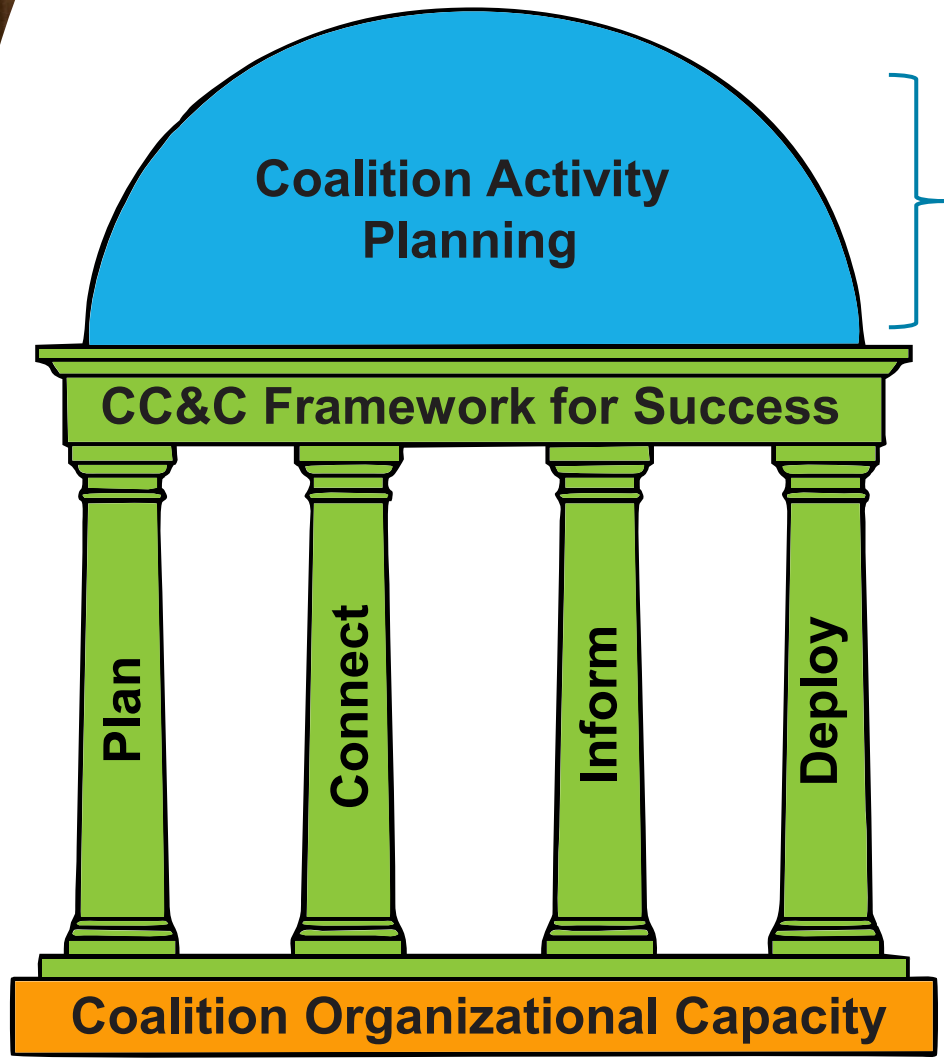
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What type of planning will we focus on today? Implementation plans.







Mission-driven work from various mechanisms (including Coalition Cooperative Agreement)

Elements to consider when developing coalition plans to achieve mission impact

Foundation for a coalition's ability to perform work, manage funding mechanisms, and train and retain staff

"Want To Do" Coalition Activities (possibilities)

- **Strategic activities** that align with coalition goals/priorities (could repeat past work, replicate others' successes, pursue new innovative ideas, etc.).
- Ideas included in a coalition's **transportation energy landscape**'s Opportunities for Mission Impact section or other planning documentation.
- Ideas developed in **collaboration with coalition stakeholders** to pursue local priorities and address barriers.

"Must Do" Coalition Activities (fulfils an essential function or meets a requirement)

- Activities necessary for the coalition to have the **organizational capacity** to exist as a legal entity, enter into funding agreements, perform funded work, and maintain operational continuity in the event of staff changes.
- Activities necessary to **execute scopes of work** for all funding agreements (including the Coalition Cooperative Agreement).
- Activities necessary to **maintain DOE-designation status**
  - A&E Requirements
  - Partnership renewal letter
  - Re-designation process.

Information To Factor Into Your Plans

- Coalition mission and vision (internal files)
- Coalition goals and CC&C partnership goals (internal files, Coalition Toolbox)
- Funded commitments, e.g., Coalition Cooperative Agreement or external grants (internal files)
- Local transportation systems, energy use, and market dynamics (stakeholder/web sources)
- Opportunities for mission impact (documented TEL)
- Stakeholder interests, priorities, and contributions (stakeholder mapping and engagement)
- Activities necessary to maintain coalition organizational capacity and meet A&E Requirements (internal files, Coalition Toolbox)
- Established CC&C strategic activities demonstrated by others (Coalition Toolbox and Forum)
- Skills and unique value of coalition (internal insights)
- Financial and staff capacity of coalition (internal insights)

Stakeholder Engagement To Inform Plans—Boards, Committees, and Staff

- Key stakeholders should be involved in the planning process from early stages.
- Stakeholder groups and staff should help shape the coalition's goals for the planning horizon.
- Can help identify strategies for the coalition to use toward those goals (e.g., activities, coalition contributions, opportunities for funding).

Engagement Ideas

- Facilitate interactive working meetings during regularly scheduled meetings.
- Meet one-on-one to get more in-depth input from board members.
- Gather feedback and input on written drafts.
- Partner with stakeholder group to host broader convenings or draft questionnaires for additional stakeholder input.

Questions To Inform Plans—Boards, Committees, and Staff



What are your goals for the coalition over the next year?



What activities (e.g., programs, projects) should the coalition prioritize next year to get us closer to X goal?



What, if any, key goals are missing from this draft plan?



How would you rank the priority of the activities we drafted in this plan?

Stakeholder Engagement To Inform Plans—Stakeholder Network

- Stakeholder network can provide important context and creative ideas for how the coalition can contribute to mission impact.
- Input can be gathered prior to drafting plans and after a draft is developed.
- Stakeholder input can help shape coalition goals and can help you identify the activities that have the most enthusiasm.
- Stakeholder engagement and involvement in your planning can increase their contributions to successful implementation.

Engagement Ideas

- Facilitate sector- or organization-type-specific meetings or working groups.
- Administer questionnaire to broad set of stakeholders to gather more insights more quickly.
- Learn about their goals for the coalition and gaps they think the coalition could fill.
- Gather input on how they'd like to work with the coalition toward goals.

Questions To Inform Plans—Stakeholder Network



What do you see as the most important near-term (1 year) priorities in your sector or for your organization?



What types of activities (e.g., programs, projects) should the coalition prioritize next year to get us closer to this goal?



Rank these draft goals/priorities based on your importance and timeliness.



Are important goals or activities missing from this draft plan? If so, what?

Tips for Stakeholder Engagement

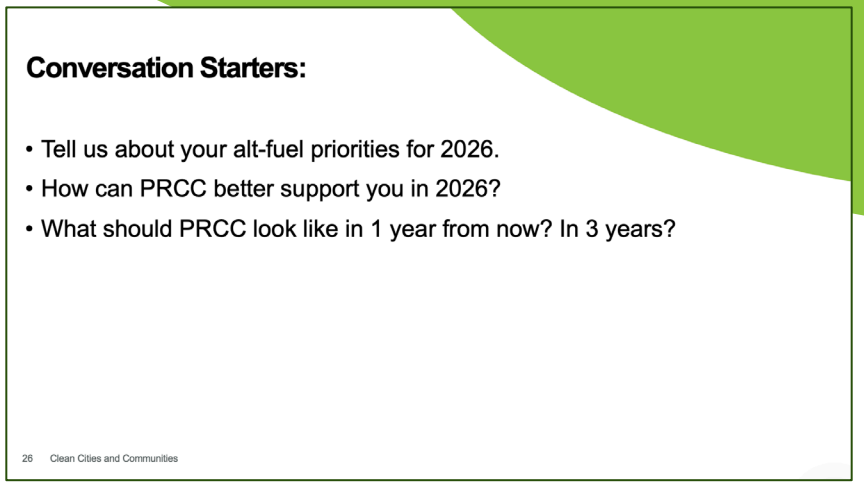
- **Be interactive and engaging:** Use sticky notes, table discussions, virtual tools, and more to keep the energy up.
- **Make it fun!** Create spaces where people want to be.
- **Be curious and ask good questions:** Avoid yes/no questions and ask follow-ups.
- **Be thorough:** Share insights and demonstrate how you used their input.

What Other Stakeholder Engagement Strategies Have You Used To Inform Coalition Plans?



Stakeholder Engagement for Strategic Planning

- Strategic plan kick-off/annual refresh (Winter)
  - Facilitated listening session series
    - SWOT/SOAR session
    - Coalition-building session
    - SMART goals session
    - Technical considerations
  - Hybrid offering to encourage attendance
  - Minimal presentation with three to four prepared topics
  - Open forum w/ notetaking
  - Include interactive tools like Mural whiteboards
- Annual stakeholder meeting (early Summer) and present results



Q&A

