

Useful Tools for Program Planning



at the Centre for Health Promotion
University of Toronto

Process	Tools	Examples or recommended references	Comments
Step One: Pre-planning and project management			
Finding and engaging partners and other stakeholders	Blue Book/211 online guides – (directories of community, social, health and gov services)	http://www.211toronto.ca/index.jsp	
	THCU's Stakeholder Wheel	Introduction to Health Promotion Program Planning www.thcu.ca	A tool to help identify stakeholders at various levels.
	Power/interest grid	http://www.odi.org.uk/Rapid/Tools/Toolkits/Communication/Stakeholder_analysis.html (Overseas Development Institute webpage on stakeholder analysis)	A map of stakeholder power and interest in your work to determine how and how much to engage stakeholders during a project.
	Terms of reference		
	RACI/RASCI model	http://www.12manage.com/methods_raci.html (Value Based Management.net)	A tool for identifying roles and responsibilities for project processes. RASCI is an acronym meaning: responsible, accountable, supportive, consulted and informed.

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Developing timelines	Gantt Charts		A graphical representation of a schedule. Useful for small and medium sized projects to track timelines and ensure that things occur in the right sequence. For larger projects consider Critical Path Analysis.
	Critical Path Method/Program Evaluation and Review Technique (PERT)	MS Project	A critical path method is useful for very complex projects. It provides a graphical overview of a project, predicts the time required to complete the project and shows which activities are critical to maintaining the schedule and which are not.
Creating and managing budgets			
Choosing and managing decision-making processes	Paired Comparison Analysis		A technique involving comparison of each option with each other option, one by one. Particularly useful when objective data is not available.

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	Six hats thinking	http://www.mindtools.com/pages/article/newTED_07.htm (Mind Tools Career Training Site webpage) http://www.edwdebono.com/ (Edward De Bono's website, creator of the technique)	A method that forces people to assess a situation from a variety of perspectives, rounding out their usual thinking style for a more complete assessment.
	Force Field Analysis	Explanations and examples http://www.crossroad.to/Quotes/brainwashing/force-field.htm http://www.mindtools.com/pages/article/newTED_06.htm http://www.psywww.com/mtsite/forcefld.html computer software http://www.skymark.com/resources/tools/force_field_diagram.asp	A method of assessing the source and strength of different forces acting on an issue.
	Pareto analysis (80/20 rule)	http://www.managers-net.com/paretoanalysis.html	A tool to help identify the changes that will have the biggest benefit. Most useful when many things are competing for your attention. Involves generation of a list of solutions, then scoring them on potential level of impact.

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	Decision tree analysis	http://www.mindtools.com/dectree.html (Mind Tools website)	A comparative method of mapping out the possible solutions to a problem, then the results that may ensue from each solution.
Managing the data collection process			
Step Two: Situational Assessment			
Consultation with stakeholders			
Literature reviews			
Review evaluation findings			
Mandate review	Scenario Testing	http://ag.arizona.edu/futures/tou/tut2-buildscenarios.html	A system of developing alternative futures based on different combinations of assumptions, situations, environmental forces.

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	Visioning	http://ag.arizona.edu/futures/tou/tut2-buildscenarios.html	An exercise to make the problem and solution visual.
Trends analysis	PEEST		An assessment of political, economic, environmental, social and technological factors affecting an issue or problem.
Environmental scan	SWOT		An assessment of strengths, weaknesses, opportunities and threats.
	Risk Analysis		A technique to consider the 'perceived extent of possible loss by: identifying threats, estimating likelihood of the threat occurring, then generating a list of ways to minimize the risk in cost effective ways.
Steps Three-Four: Identification of goals, Populations of Interest, Objectives, Strategies, Activities, Resources			
Goals			

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Populations	Scenarios, case studies, story-telling		
Objectives	Menus of objectives	www.thcu.ca	
Strategies, activities	Structured innovation	http://www.idrc.ca/uploads/user-S/11491456331Comms_tools_web.pdf	A method to investigate the total set of potential combinations and approaches to solving complex problems.
	Reframing matrix		A technique that examines problems (including currently functioning programs that need improvement) from a variety of viewpoints to come up with unique possible solutions.
	Peer assists	http://www.odi.org.uk/RAPID/publications/Documents/KM_toolkit_web.pdf http://www.km4dev.org/wiki/index.php/Peer_Assists	A method of building on existing expertise to generate solutions to a problem and/or clarify how to approach an activity.
	Affinity diagrams to gather, organize and prioritize ideas	http://www.sytsma.com/tqmttools/affin.html	

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	Mindmapping to capture and organize information	http://thinksmart.com/mission/workout/mindmapping_intro.html http://www.mindtools.com/pages/article/newISS_01.htm	A non-linear technique that captures the natural flow of ideas
	Context diagram to show relationships and info flow	http://www.vcds.forces.gc.ca/dgsp/pubs/dp_m/intro_e.asp	
	Brainstorming		A creative thinking technique where ideas as broad, odd and radical as possible are developed as fast as you can, to break out of your usual thinking patterns.
	Attribute Listing, Morphology	http://creatingminds.org/tools/attribute_listing.htm http://www.mindtools.com/pages/article/newCT_03.htm	A method of generating ideas. List attributes of a product, service or strategy (e.g., setting, audience, delivery mechanism, timing, etc.) and come up with as many variations as possible for each attribute. Then consider novel combinations of attributes for new ideas.
	Reversal		Generating a list of solutions by asking the opposite of the question you want to ask. E.g. ask, 'How would I <i>reduce</i> customer satisfaction?'

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	Provocation		A technique to shock our minds out of existing ways of thinking by making deliberately silly or provocative statements. E.g., houses should not have roofs. Then proceeding to consider the consequences of the statement, what the benefits would be, what special circumstances would make it a sensible solution, what would make it work, what would happen, moment-to-moment, etc.
	Concept fan		A way of finding different approaches to a problem when you have rejected all obvious solutions. Involves 'stepping back' to get a broader perspective on the problem (e.g. instead of considering how to control service wait times, consider how to reduce demand for services in the first place).
	Q sorting	http://www.mycoted.com/Q-Sort	

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Resources			
Step Five: Indicators			
Indicators			
Step Six: Review the Program Plan			
Review, decide, reflect, evaluate	Logic model	Logic models workbook www.thcu.ca	