

PURPOSE BUILT

ABOUT THE PURPOSE BUILT SERIES

Capital projects often bring lasting benefits to nonprofit organizations and the people they serve. Each project affects an organization’s ability to achieve its mission— signaling its values, shaping interaction with its constituents, influencing its work processes and culture, and creating new financial realities. While many projects succeed in fulfilling their purpose, others fall short of their potential. Through a multi-year research study capturing lessons learned from a diverse set of completed projects around the world, MASS Design Group has created the *Purpose Built Series*— a set of core principles and tools aimed at untangling the often complex and opaque process of building for those considering or conducting capital projects. The series is based on the findings that the best results occur when a project is built with purpose— grounded in a clear and strategic mission that informs design decisions with a scope that matches what its organization can afford to build, operate, and maintain.

Learn more at:
massdesigngroup.org/purposebuilt
hello@massdesigngroup.org

IMPLEMENTATION PLAN

Within the *Purpose Built* process, the *Implementation Plan* is a key activity and deliverable from the *Planning* phase (*Planning for Impact*, pg. 11). An *Implementation Plan* lays out the critical staff and key decisions necessary to complete a major capital project. It will align the project with the organization’s long-term strategy and development planning. It should consist of a description of the project team (in-house, external, and the decision-making structure for the project), a fundraising plan, an assessment of the organization’s financial readiness, a strategy for organizational growth, a strategy for evaluation, and logistical strategies for achieving impact during the *Design*, *Construction*, and *Occupancy* phases of the project.

If you have not done so already, we recommend you read through *Planning For Impact*, a practical, comprehensive guide for those initiating capital projects, before beginning to develop your *Implementation Plan*. *Planning for Impact* will provide an essential overview of the process of implementation of a capital project, outline details of each phase of a capital project (1. *Visioning*, 2. *Planning*, 3. *Design*, 4. *Construction*, and 5. *Occupancy*), and offer an actionable framework across three key topics (*Mission*, *Design*, and *Feasibility*). Once you are familiar with the key topics, you will be ready to begin building out the pieces to your project’s *Implementation Plan*.

This tool will help you create a timeline that prepares your organization to move forward with your capital project and answer the following key questions.



What is our Mission?

Is our project aligned with organizational goals and the local context?

Do we understand our needs? Have we further refined our priorities and needs to ensure all stakeholders are thoughtfully incorporated?

How could a capital project support our mission?



Do we have the right project defined that will help us achieve and amplify impact?

How can the design have impact?

Have we defined the design vision?

Have we recalibrated project objectives to meet needs identified by engagement?



Are we ready?

What would it take for us to be ready?

How do we do it?

Have we developed a feasible implementation and operations plan for the proposed project?

HOW DO YOU USE THIS TOOL?

STEP 1: DEFINE YOUR GOAL (pg. 3)

What are you working towards?

STEP 2: IDENTIFY KEY MILESTONES (pg. 4)

What do you need to do to help get you there?

STEP 3: MAKE A TIMELINE (pg. 12)

Add the element of time to pace out or sequence how you'll accomplish these milestones to help you get to your goal!

STEP 1: DEFINE YOUR GOAL

The intent for the *Implementation Plan* is to help your team and organization outline where you want to go, and set up a plan to get there. Before diving into this tool, ask yourself: *What is my organization working towards? What should the Implementation Plan help us achieve?* Having a clear goal identified will help align the pieces of the Implementation Plan to support the key steps that will get you closer to achieving it. Examples of organizational goals might include upcoming board or leadership change, organization anniversary, seeking city or zoning approval, preparing a Request for Proposals (RFP), launching a capital campaign, hosting a fundraising event, hiring an architect or consultant, etc.

Feel free to use the space provided below, or on your own piece of paper, to define the goal your Implementation Plan will work towards.

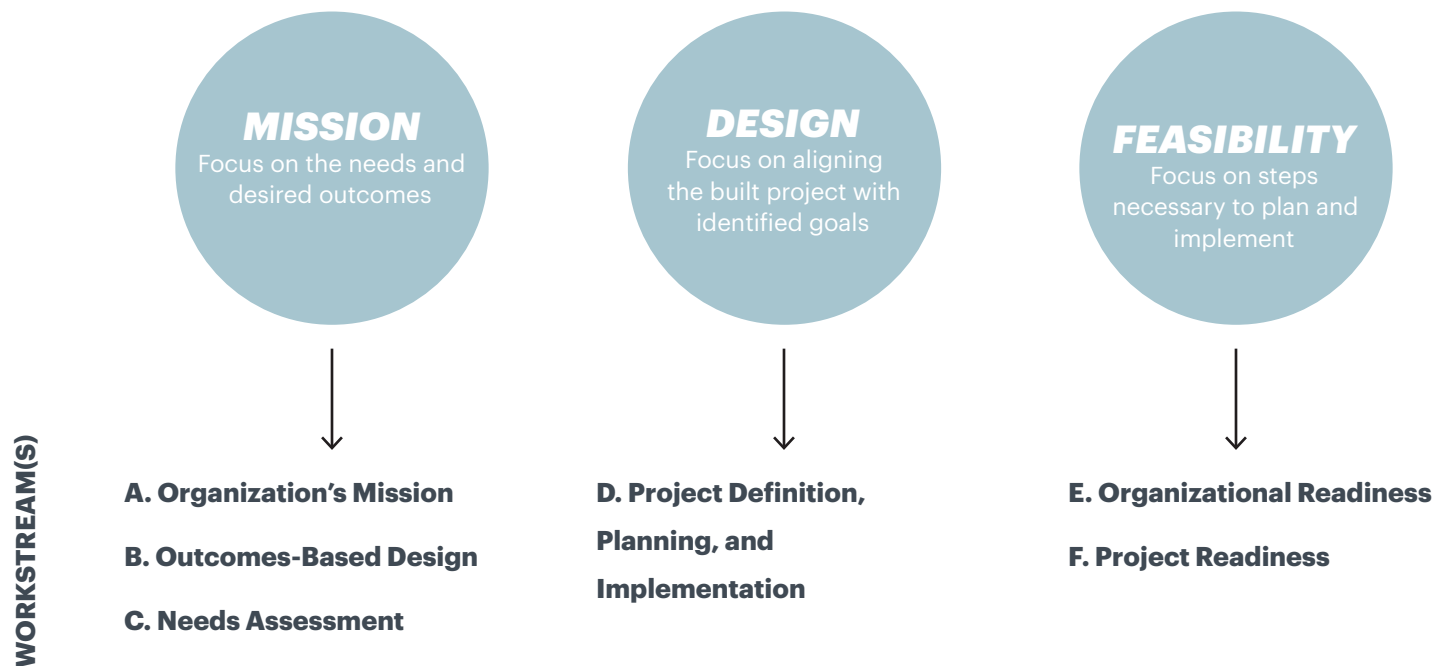
**The goal we are working towards is _____ and the
date we want to achieve this goal by
is _____.**

Once you determine what your goal is, copy it over to the end of your Implementation Plan Timeline (Step 3) where you can define the key milestones (Step 2) and timeframes (e.g., months, quarters) leading up to that date that will be needed to get you there.

STEP 2: IDENTIFY KEY MILESTONES

Planning for Impact has three workstreams that serve as the overarching framework for the phases of a capital project: Mission, Design, and Feasibility. For success, it is critical to provide balance across each of the three key topics and their associated bodies of work. Each key topic has associated workstreams that will span across the phases of the capital project and each is designed to help your team identify the steps necessary move your organization and idea forward as the project develops. These workstreams are summarized below by key topic.

The following worksheets represent each of the workstreams summarized below. Outlining key milestones to get you closer to completing each workstream. Use these key milestones to support your decision making process, but remember that your *Implementation Plan* should be reflective of your internal schedule, anticipated timeline, team capacity, and skill sets!



STEP 2: IDENTIFY KEY MILESTONES

WORKSHEET INSTRUCTIONS

Workstream name

Key Topic Area

Consult the resources for further guidance on this workstream!

Workstream description

Assess where your project team and organization are in this workstream and outline key milestones to help advance the work that needs to be done to complete this workstream!

Use this space to list steps that will get you closer to completing your key milestones!

Use as many or as few of these spaces as you need

IMPLEMENTATION PLAN

STEP 2: IDENTIFY KEY MILESTONES

Workstream

A. ORGANIZATION'S MISSION

What's the goal?

Confirm you have a clear mission for your organization.

Creating, articulating, testing, and communicating a unified vision and mission is crucial for every organization! Don't have a mission statement yet? Leverage this as an opportunity to coalesce various stakeholders around a single goal to drive your organization forward and envision who you want to be in the next 10-15 years. Have a mission statement already? Leverage this opportunity to seek alignment from your team and various stakeholders with the values articulated in the mission and revise if needed!

Resources you can use!

You may find the following resources helpful in completing this workstream.

- 1A. **MISSION:** Articulate organization's vision and mission (*Planning for Impact* p. 9)
- Tool: Impact-based Design Methodology. [Click here to download](#)

Key milestones

KEY MILESTONE:
These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

STEPS:
Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

MASS.

To help funders and their nonprofit partners make the most of capital projects, MASS Design Group created the *Purpose Built* series in partnership with The Atlantic Philanthropies and the S. D. Bechtel, Jr. Foundation. The series includes tools and resources and is the result of a multi-faceted, multi-year research study that found the best results occur when a project is built with purpose, balancing mission, design, and feasibility. This tool is built by MASS Design Group for the van Beuren Charitable Foundation as part of the *Purpose Built* toolkit. You can find the full series at [massdesigngroup.org/purposebuilt](#)

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STEP 2: IDENTIFY KEY MILESTONES

Workstream



A. ORGANIZATION’S MISSION

What’s the goal?

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Resources you can use!

You may find the following resources helpful in completing this workstream.

- 1A. MISSION: Articulate organization’s vision and mission (Planning for Impact p. 9)
- Tool: Impact-based Design Methodology. [Click here to download](#)

Key milestones

KEY MILESTONE:

These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

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STEPS:

Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

1					
2					
3					

STEP 2: IDENTIFY KEY MILESTONES

Workstream



B. NEEDS ASSESSMENT

What’s the goal?

Figure out what your organization really needs (not just wants).

Every project starts from a perceived need. Take this step as a way to gut check before you dig deep. Ask yourself: *Is it really a need? Is the solution I’m assuming will solve this need the right one?* To do this, you want to take careful stock of your current and historical infrastructural, programmatic, and operational needs. Bring an objective eye! Use input from various stakeholders to help identify less obvious and equally important needs and priorities, as well as validate if you’ve articulated the right needs.

Resources you can use!

You may find the following resources helpful in completing this workstream.

- 1A. MISSION: Needs Assessment (Planning for Impact p. 9)
- Tool: Field Immersion Methodology (Planning for Impact p. 53)

Key milestones

KEY MILESTONE:

These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

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STEPS:

Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

1				
2				
3				

STEP 2: IDENTIFY KEY MILESTONES

Workstream



C. OUTCOMES-BASED DESIGN

What’s the goal?

Define a clear mission for the project.

The project mission should support your organization’s mission. But don’t conflate the two; they are separate things! As you think about the project’s mission, remember that capital projects can serve as powerful symbols such as raising expectations or catalyzing momentum. You should not be afraid to ask: what more can design do? Just like with your organization’s mission, define the theory of change behind the capital project and identify indicators and criteria that will help track progress and plan for evaluation efforts once the project is complete.

Resources you can use!

You may find the following resources helpful in completing this workstream.

- 1A. MISSION: Outcomes-Based Design (Planning for Impact p. 10)
- Tool: Outcomes-based Design (Planning for Impact p. 38)

Key milestones

KEY MILESTONE:

These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

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STEPS:

Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

1					
2					
3					

STEP 2: IDENTIFY KEY MILESTONES

Workstream



D. PROJECT DEFINITION, DEVELOPMENT, & IMPLEMENTATION

What's the goal?

Determine the right solution that will help resolve your needs.

Ideas need to be developed and refined beyond the initial vision. Consider and compare potential project ideas and ask yourself: *What's the right project to best achieve and amplify your desired impact? What type and size is appropriate?* Explore a variety of comparable projects or precedents to help you reach a decision. If your solution is a building, be sure to convey your desired qualities and characteristics of spaces in and around the building and analyze the feasibility of the project's chosen location.

Resources you can use!

- You may find the following resources helpful in completing this workstream.
- 1B. DESIGN: Project Definition (Planning for Impact p. 11)
 - 2B. DESIGN (Planning for Impact p. 16)
 - Tool: Design Opportunities

Key milestones

KEY MILESTONE:

These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

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STEPS:

Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

1				
2				
3				

STEP 2: IDENTIFY KEY MILESTONES

Workstream



E. ORGANIZATIONAL READINESS & PREPARATION

What's the goal?

Confirm if your organization is ready, and if not, take steps to be ready.

No matter how big or small, new capital projects will have long-lasting impacts to an organization, some of which will carry long into the lifetime of the facility. Capital projects require major investments in time, staff, and finances, which demand an honest look at your current capabilities and an assessment of who and what you'll need to help your organization navigate this major change over time.

Resources you can use!

You may find the following resources helpful in completing this workstream.

- 1C. FEASIBILITY (Planning for Impact p. 11)
- 2C. FEASIBILITY (Planning for Impact p. 18)
- SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats). <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-andresources/swot-analysis/main>

Key milestones

KEY MILESTONE:

These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

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STEPS:

Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

1				
2				
3				

STEP 2: IDENTIFY KEY MILESTONES

Workstream



F. PROJECT READINESS & PREPARATION

What’s the goal?

Test project feasibility from many angles: cost, time, team.

Conduct key preparation and decision-making activities necessary to implement your capital project. Invest in careful preparation of a project budget, team, and schedule that will align and amplify the project’s intended mission.

Resources you can use!

You may find the following resources helpful in completing this workstream.

- 1C. FEASIBILITY (Planning for Impact p. 11)
- 2C. FEASIBILITY (Planning for Impact p. 18)
- Capital Project Budgeting Worksheet (Planning for Impact p. 47)

Key milestones

KEY MILESTONE:

These are important deliverables and touch points in the workstream process. Use as many of the blank spots provided or add more if you need to!

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STEPS:

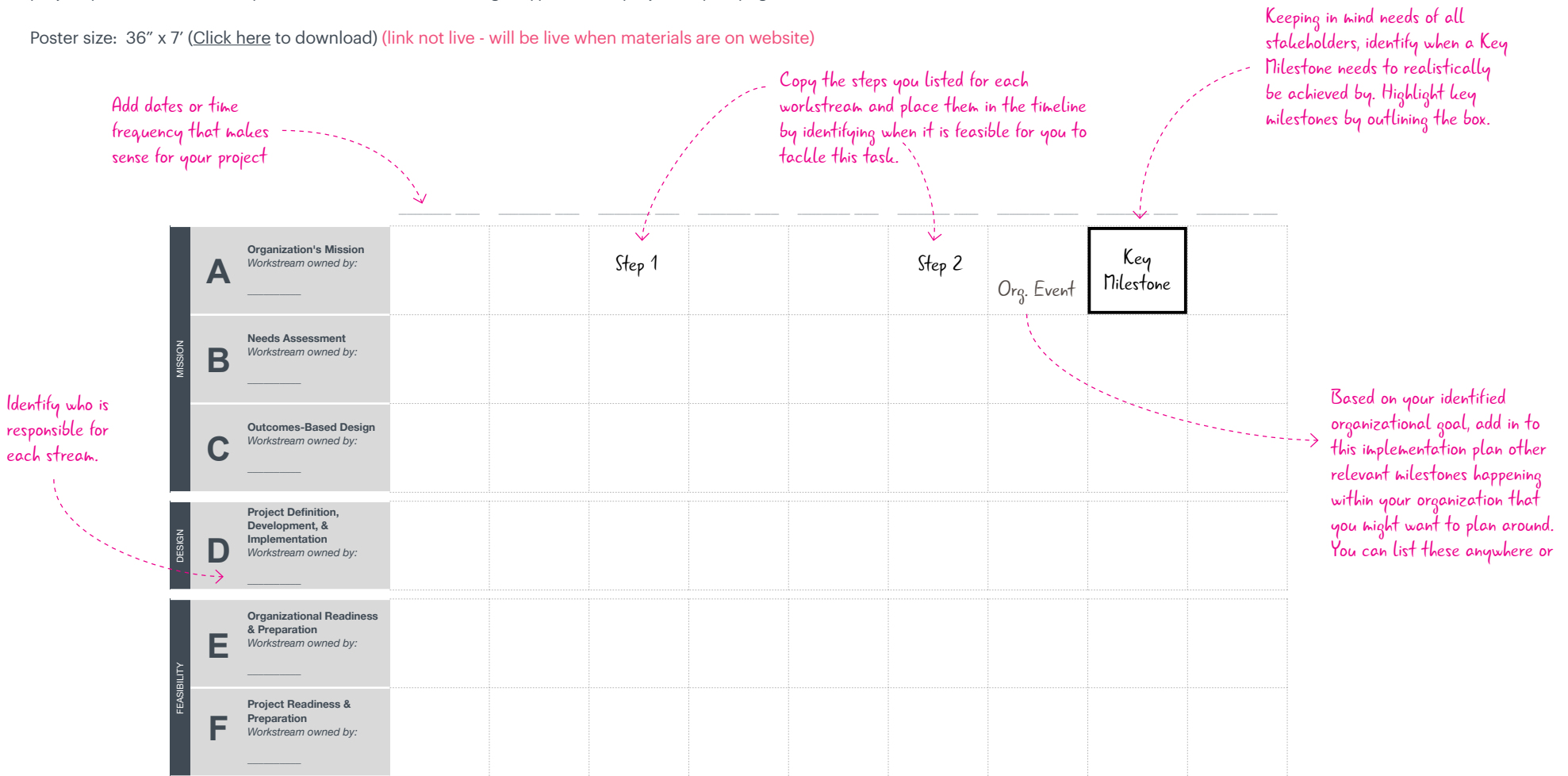
Key milestones are arrived at through a process of smaller steps. List these here, and continue on a separate piece of paper if needed.

1				
2				
3				

STEP 3: MAKE A TIMELINE

Now it's time to plot your goal and key milestones towards achieving that goal onto a timeline! We have provided two timeline template options you can use for this step: a printable 8.5" x 11" landscape template on page 13 and a printable 36" x 72" large-format poster. Feel free to use these templates or recreate it using your preferred format, with materials you have at hand, or on a virtual whiteboard like MIRO or Mural. This timeline template is a great way to visualize your key milestones all in one place and assign someone on your team to be responsible for that task. Having your timeline displayed within your project space can further help keep you on track through the capital project phases. For an example of a filled out timeline using a hypothetical project, flip to page 14!

Poster size: 36" x 7' ([Click here](#) to download) (link not live - will be live when materials are on website)



IMPLEMENTATION PLAN

STEP 3: MAKE A TIMELINE!

Print as many copies of this template as you need to complete for your project timeline.

Input your stages or timeframe here

MISSION	A	Organization's Mission Workstream owned by: _____								
	B	Needs Assessment Workstream owned by: _____								
	C	Outcomes-Based Design Workstream owned by: _____								
DESIGN	D	Project Definition, Development, & Implementation Workstream owned by: _____								
FEASIBILITY	E	Organizational Readiness & Preparation Workstream owned by: _____								
	F	Project Readiness & Preparation Workstream owned by: _____								

IMPLEMENTATION PLAN

EXAMPLE TIMELINE FILLED OUT USING A HYPOTHETICAL PROJECT EXAMPLE

		MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9
MISSION	A Organization's Mission Workstream owned by: <i>Sarah Commons, Executive Director</i>									
	B Needs Assessment Workstream owned by: <i>Brian Jones, CFO</i>	Make a final determination on whether or not a building project is the right thing to prioritize for the 100 yr. anniversary capital campaign. If not, determine how to solve for current pain points without campaign		Finalize Case Statement / Development Pitch: short document that synthesizes the need, vision and strategy for the capital project; tells a cohesive narrative, builds case for project, outlines implementation strategy.						
	C Outcomes-Based Design Workstream owned by: <i>Maria Garza, Project Manager</i>		Create a theory of change model to help with design decision prioritization later in the project; define the indicators and criteria you'll use to track project impact							
DESIGN	D Project Definition, Development, & Implementation Workstream owned by: <i>Maria Garza, Project Manager</i>			Begin to define the right project scope; define the fit-for-purpose type and size	Explore if you should build in phases or all at once in an ideal scenario; identify if you need to build a new building or if renovation of the current space will meet your needs	Finalize the project scope and phasing strategy for the ideal-state project	If it's determined a new site is required, develop site selection criteria before beginning to look for sites. Use that criteria to evaluate each site's potential.	If it's determined a new site is required, begin exploration of potential new sites. Note that this process may unfold over the course of several months, so a planned approach may make the most sense.	Study other project precedents; use learnings from those explorations to help reinforce the case statement/development pitch	
FEASIBILITY	E Organizational Readiness & Preparation Workstream owned by: <i>Brian Jones, CFO</i>			Develop a RACI-style accountability matrix for the project			Begin to draft communications campaign: key messages, plan for rollout	Begin development of required visuals for use in campaign	Finalize communications campaign, prepare team to act on it	
	F Project Readiness & Preparation Workstream owned by: <i>Maria Garza, Project Manager</i>	Identify what an ideal project team should look like and identify if any board and staff members have capacity and capabilities to support	Plan for how to fill any capacity gaps; internal and external resources		Conduct an evaluation of your internal budgeting process; us insights to inform future capital project budget development	Complete a Project Team Worksheet from the "Planning for Impact" document aligned with the finalized project scope; revisit expertise and responsibility gaps and plan for ways to fill those	Complete Draft of Capital Project Budgeting Worksheet; review with professional consultants; develop a draft project schedule work backwards from a final "move in" date	Conduct capital campaign feasibility study; Develop a campaign timeline; concurrently develop internal and external communications plan	Finalize associated tools to support the development pitch; equip fundraising ambassadors and weave key partners into this process	Explore if you need a capital campaign accountability consultant to help avoid derailment.

IMPLEMENTATION PLAN

EXAMPLE TIMELINE FILLED OUT USING A HYPOTHETICAL PROJECT EXAMPLE, CONTINUED

		MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16
MISSION	A Organization's Mission Workstream owned by: <i>Sarah Commons, Executive Director</i>			Decision to Proceed Milestone: Is the project feasible and strategically aligned with mission and vision for impact? Makes sense to launch a campaign for a building?				Launch Capital Campaign
	B Needs Assessment Workstream owned by: <i>Brian Jones, CFO</i>	Revisit needs - has anything changed that should adjust the project size or type?						
	C Outcomes-Based Design Workstream owned by: <i>Maria Garza, Project Manager</i>	Review/refine project's theory of change, indicators & criteria, and mission & goals. What have you uncovered to date that might change your original thinking? Anything that verifies or refutes assumptions?						
DESIGN	D Project Definition, Development, & Implementation Workstream owned by: <i>Maria Garza, Project Manager</i>		Revisit project size and type; determine if anything needs to adjust based on what you've learned in the last 6 months		Define if you can or should associate a new site with the launch of the capital campaign, or wait until after the campaign begins to secure a site			Launch Capital Campaign
FEASIBILITY	E Organizational Readiness & Preparation Workstream owned by: <i>Brian Jones, CFO</i>		Finalize development of required visuals for use in campaign					Launch Capital Campaign
	F Project Readiness & Preparation Workstream owned by: <i>Maria Garza, Project Manager</i>		Finalize Capital Project Budget + Schedule		Begin to act on fundraising plan quietly			