

Writing a project plan

There are many reasons to write a project plan – it might be that you are looking to start a project that may turn into an organisation (or may remain as a smaller scale project); or your organization is looking to start a new project and require funding for it. No matter where you are starting from, there are some simple steps you can take to make your project successful.

The first step is to write up a project plan.

Why have a project plan?

It is important to write a project plan before you start the project. This will clearly specify your project from the outset and by gaining agreement of the project plan from all involved will be a written definition of what is required, by when and by whom.

The project plan will help you decide what will be needed and when. It will also help prove that you know what you are doing if asking for funding.

The agreement of a written project plan has several benefits:

- It will avoid misunderstandings;
- It will expose practical details which may otherwise be overlooked;
- It will help all involved to think about the details and their implications.

A project plan generally includes the following:

1. Background

In the project plan, there should be a clear explanation of why you are carrying out the project. It should include background information and details of why it needs to be done, how it fits with your organisational aims and any research you have done into it.

If staff are to be employed on the project then you should draw up job descriptions, person specifications and a recruitment strategy. If the project is to use volunteers, you should draw up role descriptions. These can be mentioned in the background and attached as appendices. You should be clear about how both paid staff and volunteers will be managed.

2. Aims

The aim of a project should be a statement of what you intend to achieve. Think about why you are carrying out the project, what need did you identify and then say what you intend the project to do in solving that need. For example, if you identified a need to be high levels of obesity, you might set your aim as: To reduce obesity levels in Camberwell.

You should also ensure when setting the aims that these are measurable – see Monitoring and Evaluation below.

3. Objectives

Objectives are more specific and measurable than aims. You should set 'SMART' objectives. This means that objectives should be:

- Specific - clear about what will be achieved;
- Measurable - you can measure when objectives have been achieved;
- Achievable - they can be achieved;
- Realistic - they can be achieved using the resources available;
- Timed - they can be achieved within the timescale specified.

If you can't evaluate an objective it's not SMART.

For example, if our aim is To Reduce Obesity Levels in Camberwell, some objectives may be:

- Increase understanding of what causes obesity in each age bracket
- Increase knowledge of where to purchase healthier food for less in Camberwell
- Increase ability to cook healthy meals

4. Risk Management

All projects have associated risks. A risk analysis at the start of the project will help you predict the risks that could prevent your project from succeeding. It will also help you to manage the risks should they occur. A risk analysis addresses the following questions:

- What could possibly go wrong?
- What is the likelihood of it happening?
- How will it affect the project?
- What can be done about it?

Risks might be related to staff or volunteers, the organisation and external factors. Include an analysis of risks and contingencies against risk in your project plan.

This can easily be done in an Excel spreadsheet: use one tab as a matrix of Likelihood of happening v Impact if it did. You will find there are lots of everyday risks that are easily managed through basic policies and processes; some are simply a case of getting the correct insurance or licenses etc.

Once all the smaller risks have been dealt with, concentrate on the bigger risks – the ones that are quite likely to happen and would have a big impact if they did and ensure you have thought about what you can do to mitigate against them and contingency plans for if they do happen.

5. Partners

If the project involves partner, it will be important to ensure each partner knows exactly what their part to play is. Especially if it involves more than one partner, the partners should be formalised by a partnership agreement including a list of partners and the responsibilities of each, financial arrangements, arrangements for resolving disputes, ownership of project assets and ownership of project outputs.

For example, if getting funding for the project, which partner will be the lead? How will monitoring and evaluation take place across all partners? Who is responsible for which aspects? And so on.

6. Steering Group?

How will the project be managed? Ultimately the management committee is responsible for the project but day to day responsibility will often be delegated to a paid staff member.

Projects without paid staff (and even some with paid staff) might find that a steering group is helpful.

A steering group can provide a forum for discussion and decision making. The role of the steering group might be to:

- Steer and guide the project;
- Review project progress;
- Maximise the impact of the project outcomes;
- Advise the project team;
- Represent the interests of the project partners;
- Agree important decisions and changes to plan;
- Discuss risks, problems, and issues and suggest solutions;
- Give input on what could be improved.

The project plan should include the membership of the steering group and the group's remit.

7. Milestones and work packages

Project plans should include details of the work required. This should be broken down into work packages which will include tasks, start dates, completion dates, outputs, milestones, and person responsible for each task.

Again, a simple Excel spreadsheet can be used to create your Gantt Chart or other easy to use tool that will help everyone to keep track.

Make sure the steering group monitors this.

8. Project Budget

The project plan should include a project budget. This might include costs for: staffing, travel and subsistence, hardware, software, other equipment, dissemination activities, evaluation, training, administration.

If you have never run a project before, try a quick online search to find out what salary is usual for the type of staff member you need or how much trainers and consultants charge on average for example. This will help keep your budget as accurate as possible.

9. Monitoring and Evaluation

Your plan should include details of how you will measure the effectiveness of the project. How you have achieved what you set out in your project aims?

Most funders will require this information as part of their agreement with you.

When planning your project, you should ensure that you understand outputs and outcomes:

Outputs are easily measurable such as how many people used your service, how many of them were women, how many are from black and minority ethnic communities, and so on.

Outcomes are about describing the changes, benefits, learning or other effects that happen as a result of your work.

10. Marketing

It is sensible to include information about how you intend to market your project and disseminate information about the project before, during and after.

Effective marketing helps to raise awareness about your work by letting others know what you are doing; inform others of your experiences; and to promote your project outputs.

There are a wide variety of dissemination methods, including the use of a newsletter or website, press releases, meetings, leaflets, conferences, workshops, articles and reports. You might also use social media for more immediate dissemination.

The project plan should include which you will use to deliver your key messages.

But remember to target your messages – a funder will require different information that your beneficiaries’.

11. Sustainability

From the start projects need to plan for what will happen at the end of the project, as sustainability has implications for the work done during the project.

Will the project have a definite end date? If so, do you need an exit plan i.e. will you signpost users elsewhere; will you have a website that lives on after the project; will it develop a toolkit or an app for example?

If not how will you continue to fund it?

Will you approach another funder(s) to take over funding of the project? Funders like to find new innovative ideas. Merely taking over the funding of an existing project may not be very attractive to them, so what else can you do?

Will you be looking for the project to become commissioned by a statutory authority? This not an easy option – if you are planning it from the outset then you need to have a very clear understanding of the policy context of the relevant statutory body and how your project fits this as well as ensuring you are well networked with that authority.

Support

If you would like any support with governance or any other issues facing your organisation, please contact the Development Team at Community Southwark: development@communitysouthwark.org or 020 7358 7020.