

FACT SHEET: How to Plan Your Project

Project Planning

'Project Planning' is all about getting the job done by planning each stage of a project before it happens – from your first ideas through to completion.

Your project might be as simple as organising a 'one-off' school trip, or a one day sports event through to a training programme, a festival, or a more complex project such as a new building project.

Project Planning is one of the key stages of over-all 'Project Management' – it is the work you do to plan your programme or activity so you can achieve it in an organised and efficient way.

There are various methods you can choose to do this. This fact sheet discusses some basic processes and suggests where to find further information.

Why Plan?

Planning helps you to achieve your goals. If you're responsible for a project, planning ahead may help your project to happen more easily.

It could help to save you or your group time, money, stress and in the worse case scenario, the failure of your project.

Project Planning may go a long way to helping you achieve the goals or targets set out in your Business or Operational Plan. See our related fact sheet 'How to Develop a Business Plan' (if you don't have one we recommend you read this).

It is important when you are applying for funding with a special project or programme in mind, to be able to show that you've thought carefully about how you're going to make your project happen. This could help the funding agency assessing your application to understand your goals and have more confidence in your project.

Stages of Project Planning

Once you know broadly what it is you need to do – then you need to work out exactly what you need to do to get it done.

Section 2 on 'Planning' in the 'Community Resource Kit' available on www.community.net.nz suggests a useful framework for project planning.

The following sections offer suggestions adapted from this framework.

Another method of planning is available on the Funding Information Service website www.fis.org.nz – check the 'How to Guide' on 'Planning Your Project'

STAGE ONE: 'Starting Up' your project

In the first stage of your project you need to work out what you want to do, what you need to do to get it done and how you will know whether you have achieved what you set out to do. At this point you can draft the 'Terms of Reference' for the project – i.e. write down the reasons for the project, and its 'terms' (what it involves).

Decide on your project;

- **Name** – give your project a name so everyone knows which project it is – busy people often have a lot of activities on the go!
- **Co-ordinator** – even though 'many hands make light work' – 'too many cooks can spoil the broth' - make sure you have one person responsible for keeping the project on track – who will it be?
- **Objective/s** – why you are doing it and what do you want to achieve?
- **Deliverables** – what are the specific things you want to achieve? – What will be produced at the end?
- **Scope** – what is included in the project and what is not? – e.g. if the project is to build a new playground – what equipment and activities are involved?
- **Relationships** – what other projects or people might relate to or affect your project? Is there some way you can involve them in your plan?
- **Resources** – what resources do you need to make it happen? e.g. Money, People, Skills, Time, Space, Equipment, Training?
- **Schedule** – create a time-line – when will the project start? what is going to happen at what stage? when will it be completed?
- **Risks** – what might go wrong? what can you do to reduce risks?. This is also known as 'Risk Management' and it has become an increasingly important aspect of project planning in today's business climate.

STAGE TWO: Planning Your Project

At this stage you need to decide on the 'specifics' - the 'what, when, why, how and who'?. It is sensible to create a chart or 'project schedule' for this activity. There are many ways of doing this.

For very simple projects needing a minimum of preparation it might be enough to create a simple 'Action Plan' listing:

- What needs to be done? (Objectives/ Scope/ Deliverables/ Risks)
- What you need to do it? (Resources)
- Who will do it? (Co-ordinator/ People Responsible)
- When will it be done by? (Schedule)
- What follow up is needed? (Evaluation and Monitoring)

For more complicated projects other methods can be helpful.

The 'Community Resource Kit' www.community.net.nz suggests using a simple 'GANTT Chart' - see page 4 of this fact sheet for an example of this. The Gantt chart is a 'bar chart' used to record the task at hand, who is responsible for each aspect, and the date this needs to be done by. The chart provides a time-line and helps you to see which tasks need doing first and how each task or step in the process relates to the next.

Stage Two continued:

During this planning stage you can organise your:

Project Budget - estimate what costs are going to be involved to get the job done from start to finish (see our Fact Sheet on 'How to Develop a Business Plan'). See page 5, Section 6 of the 'Community Resource Kit' www.community.net.nz. Think ahead about any budget 'blow-outs' that might occur. Identify possible sources of funding for your project – if you are unable to identify a funding source you may need to think about re-assessing your project objectives and scope in order to be eligible.

Monitoring and Reporting systems - set up a simple system for monitoring and reporting on how the project is progressing, how the budget is going and any risks or issues to be dealt with – who do you need to inform?

Risk Management Plan – plan how you are going to manage any potential risks involved. 'Risks' can range from such things as financial and 'PR' risks through to Health and Safety risks which might affect the project. See page 16 – 17, Section 2 of the 'Community Resource Kit' www.community.net.nz for further details on Risk Management planning.

Health and Safety / Hazard Management - if you are organising a project such as an event, or using volunteers or contractors to implement a project, it is very important to know your responsibilities. For projects involving potential 'Health and Safety' risks – find out what your responsibilities are – see www.acc.govt.nz for further information on Health and Safety and Hazard Management or talk to your local Community Law Office for further information.

See www.osh.dol.govt.nz/law/quickguide/who/volunteers for information on the how the Health and Safety in Employment Act relates to Volunteers

Communications Plan – how to communicate with your 'stakeholders' (people with an interest in the project), the public and media about your project. To find out how to develop a Communications Plan see Section 9 of the 'Community Resource Kit' www.community.net.nz

STAGE THREE: Implementing Your Project

As you will be busy doing the project at this stage it is important to use your systems to regularly monitor and report how your project is progressing. You may start facing problems or 'issues' and you'll need to deal with them and ensure you 'control' them – e.g.: budget blow-outs, hold-ups due to commercial, regulatory or legal issues, bad weather etc. This is when your 'Risk Management Plan' becomes useful. However if you didn't count on the problem that is occurring – make sure you have a system to revise your plans if needed!

STAGE FOUR: Finishing your project

At this stage your project is coming to a close, however there is still work to do. It is important to finish off any outstanding jobs, work out what tasks need to be carried on if any, and evaluate and report on your project. How well did the project go? Did you achieve what you set out to do? What did you learn from the project? – could this be shared with others? Make a record of the project including any photos, news clippings, and useful documents to keep.

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To create a project schedule (or Gantt chart)

1. On a whiteboard or large piece of paper, draw up the following template:

Figure 1: Project Schedule (or GANTT chart)

TASK (EXAMPLES ONLY)	RESPONSIBILITY	FEB	MARCH	APRIL	MAY	JUNE
Develop the project plan	Jack	→				
Obtain sponsorship	Hine	→				
Finalise programme	Esme		→	→		
Print programme					→	
etc.						

2. List the action steps (tasks) down the left hand side.
3. Next to each action, write the name of the person responsible.
4. Mark on the calendar the deadline for each step, and the length of time the step will take. Note the interrelationships between the steps where you may see critical times when a number of things are scheduled to happen at the same time.
5. Keep track of the progress against the plan.

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