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# Project Plan for <Project Name>

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Prepared by ABC Consulting

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(available online at [http://www.slostc.org/tools/project\\_plan\\_template.doc](http://www.slostc.org/tools/project_plan_template.doc))

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# Project Plan for <Project Name>

**T**his project plan serves as a coordinating tool, planning aid, and communication device to help identify and convey the key elements of a particular effort to be undertaken. The effort may be performed entirely within an organization or by outside parties. Specific requirements derived from RFPs (requests for proposal), clients, or funding agencies can be folded into the applicable sections below.

## 1.0 Project/Program Description

[Describe the long-term or “big picture” vision of the completed program or project. How will it look, smell, feel, taste, perform, increase productivity, help customers, or otherwise benefit human kind? What purposes and dimensions will it entail? How does it relate to your mission, strategies, problem statement, and any other project successes?]

## 2.0 Goals and Objectives

[What are you trying to accomplish? List the project or program goals and objectives in terms that are clear, concise, achievable, and measurable. **Example 1:** By May 2004, the Mayberry Community Center will have served 150 enrollees, 50% of whom will represent under-served populations. **Example 2:** The initial project goal entails producing a four-hour video training series on self defense with an accompanying training manual and resource database to be accessible by college students over the Internet by May 2004.]

## 3.0 Intended Audiences or Beneficiaries

[Who will be served by the project or program? Examples include customers, clients, clients’ customers, recipients of services provided, communities, wildlife, students, specific segments of the population, and so forth.]

## 4.0 Products to be Created (If Any)

[Examples include: Studies, reports, manuals, instructional materials, software and information systems, graphics, Web sites, widgets, databases, and the like. Distribution methods and media (such as CD-ROM, Internet, or printed documents) also should be identified. A detailed breakdown might appear in a separate Service Agreement.]

## 5.0 Services to be Provided (If Any)

[Examples include: Providing business software training, after-school activities, wildlife tours, nutritional counseling, copy editing services, day care, and customer satisfaction assessments. A detailed breakdown might appear in a separate Service Agreement.]

## 6.0 Methods

[What general approach and techniques will you use to provide services or develop products for your project or program? For example, will you start by researching and analyzing your audiences' needs, and continue with a series of design, implementation, pilot testing, and deployment activities? When the planning is finalized, you might include a detailed task and schedule breakdown as an attachment or appendix.]

## 7.0 Anticipated Phases, Milestones, and Schedule

[Will your project or program involve an incremental implementation process that will occur over many months or years? If so, what long-term phases do you anticipate? Are there important milestones that will occur within these phases? Can you identify a specific schedule for the aspects you will be performing in the short term?]

## 8.0 Potential Partners or Collaborators

[Do you anticipate joining forces with other agencies, organizations, or consultants to complete the program or project? What experience, infrastructure, expertise, funding, credibility, or other benefits will they bring to the table?]

## 9.0 Sources of Information and Expertise

[From what subject matter experts (SMEs) will you receive information and assistance? Will you need to do additional research, and if so, what sources will you tap? Examples include Internet resources, company documentation, customer feedback, trouble logs, service reports, surveys, evaluation forms, census data, research studies, and the like.]

## 10.0 Required Systems and Equipment

[Examples include: Servers, networks, computers and peripheral devices, and other types of equipment. If the organization will be acquiring these items, a breakdown might appear in a separate Technology Plan. If a service provider or contractor will provide the equipment, this responsibility can be explained here and/or discussed in Section 15.0.]

## 11.0 Tools, Templates, and Conventions to be Used

[Examples include: Style guides, typeface conventions, forms, file naming conventions, presentation guidelines, procedural outlines, specific software applications, standard operating procedures, and Web page templates.]

## 12.0 Evaluation Processes

[How will you evaluate the progress and effectiveness of your program or project? Will you be collecting information regarding how you are carrying out your stated objectives (process evaluations), and how well you are serving your target audiences (outcome evaluations) at various points in time? Will you be using any outside evaluators?]

## 13.0 Review and Approval Processes

[Who needs to review and approve each phase, service, product, or other deliverable of the project? What protocol will be used? How will reviewer comments be incorporated or otherwise addressed?]

## 14.0 Method for Managing Changes and Derivatives

[What is the expected life cycle (or life span) of the product or service to be developed? Will it continue in its current state, be updated intermittently, or phase out within some period? Might a product or service eventually be revamped for a different audience or purpose? What process or procedure will be followed when any changes to designs, products, or services occur? Who will participate in the change process?]

## 15.0 Project Responsibilities and Dependencies

[Who is responsible for producing the product(s); providing services; and for providing equipment, resources, and training? Who will perform proofing, editing, supervising, translating, and the like? For example, will the organization or agency be responsible for making available any equipment, facilities, subject matter experts, and reviewers? Is a contractor responsible for creating a specific set of products or performing evaluations?]

## 16.0 Risks to be Managed

[What potential risks exist with respect to funding, time, and resources? Are there cost, schedule, and quality trade-offs that should be evaluated? Does the undertaking have sustainability risks that would cause social hardship if the project ended? How will each risk be mitigated?]

## 17.0 Open Issues and Questions

[What questions and concerns remain after all topics above have been considered? How and when will these be resolved?]

## 18.0 Appendices and Attachments

[If preparing to use the project plan as a project agreement, appendices or attachments can include detailed content outlines, specific schedules, and signatures, for example.]