Managing projects

Fact sheet 1: The importance of project planning

What is project planning?

Planning entails a series of decisions, from general and strategic decisions to specific operational ones, based on the gathering and analysis of information. The field of planning encompasses a broad range of different approaches, including strategic planning, program planning and operational planning.

Project planning is a form of operational planning, whereby the <u>consecutive steps to implement the project activities are carefully mapped out</u>, based on an analysis of relevant information and linked to the program in which the project takes place and to which it should contribute. Essentially, project planning involves establishing the scope, aims and objectives of a project, the way in which the project will be performed, the roles and responsibilities of those involved, and the time and cost estimates. It answers questions such as:

- what are the project objectives?

- what will be done to reach the project objective?

- how it will be done?

- who will do it?

- when it will be done?

The output of the project planning process is a **project plan** that will be used by the project manager(s) to implement the activities, monitor the progress and make decisions

Why is project planning important?

Project planning is essential for a project's success, and as such is often considered the most important phase in project management.

By establishing the scope, aims and objectives of a project and mapping out the procedures, tasks, roles and responsibilities, project planning helps to reduce the main pitfalls leading to project failure, such as:

- Selecting an unimportant problem

- Not addressing the key determinants of the problem

- Not choosing the best intervention strategy to address the problem determinants (e.g., choosing solutions that are not supported by evidence, or reinventing the wheel)

- Choosing interventions that are not sufficiently adapted to the target group or context

- Poor quality of implementation

- Not performing the right kind of evaluation (e.g., wrong evaluation level or poor evaluation methodology)

- Insufficient dissemination (e.g. poor visibility of the project, or not enough sustainability of the results).

On the other hand, establishing the scope, tasks, schedules, risks, quality and staffing needs helps project team members to understand their responsibilities and expectations. As such, the effort spent in planning can save countless hours of confusion and re-work in the subsequent phases. The time spent properly planning will result in reduced cost and duration, and increased quality over the life of the project.

Who should be involved in the planning process?

The involvement of internal and external stakeholders from the start of the project is critical to achieving optimal results. **Stakeholders** are those people who hold a stake in the project - they are people who are interested by the project's outcome. Anyone who might be affected by the project could be regarded as a stakeholder.

It is important to identify your stakeholders so that you can understand their points of view, and get an idea of the pressure they will try to exert on your project. Failure to involve stakeholders may lead to decisions being overruled, delayed, challenged, or questioned afterwards.

Project planners must therefore identify the key stakeholders and consider their roles from the outset. Key stakeholders may include

- the project team

- partners

- sponsors

- politicians and decision makers

- representatives from the target community or target group

- the media, the scientific community, civil society group, etc…

To identify stakeholders and manage their involvement in the project, it is useful to draw up a **project organization chart**. This is a simple graphical illustration of who's involved in the project and where they fit in the overall organizational plan. A project organization chart is created by:

- Writing down the names of everyone who's involved in the project.

- Grouping them according to their roles—project board members, stakeholders, and project team members. In most cases, you will need to split the stakeholders' group further into the various stakeholder categories.

- Charting the results graphically, with project board at the top, the project team in the middle, and stakeholders radiating out from them. If some of the stakeholders report to the project board members, it may be worth indicating this on the chart.

Deliverables from the project planning process

There are three major deliverables from the project planning process

- The **project definition** describes all aspects of the project, such as the scope, objectives, and method. Once approved by the relevant stakeholders, it becomes the basis for the work to be performed.

- The **project work plan** provides the step-by-step instructions for constructing project deliverables and reaching outcomes.

- The **project management procedures** describe the procedures that will be used to manage the project. It will include sections on how the team will manage issues, scope change, risk, quality, communication, etc. It will also make use of the project organisation chart.

Further reading

- Wiliams M. (2008). The Principles of Project Management. Collingwood: Sitepoint.
- Haughey D. (2009) Project Planning: A step by step guide. Project Smart.
- Godin G, Gagnon H, Alary M, Levy JJ, Otis J (2007). The degree of planning: an indicator of the potential success of health education programs. Promotion & Education, 14(3):138-42.
- Kok G (1992). Quality of planning as a decisive determinant of health education effectiveness. Hygie, 11(4):5-9