

Managing projects

Fact sheet 2: Key Elements of a Project Plan

What is a project plan?

A project plan is the result of the process of project planning. It establishes the scope, aims, objectives, and method that will be used for the project, as well as the way in which the project activities will be performed, the roles and responsibilities of those involved, and the time and cost estimates. The project plan will serve as a basis for the project manager(s) and project team to monitor the project's progress and to make decisions.

Key elements of a project plan

Rationale

A project plan should start with a clear and concise argument explaining why the project is important. This does not need to be long or detailed, but should make a convincing business case for the work to be done. The rationale should preferably be **evidence based**, and include:

- an outline of the importance of the (health) problem(s) and their context ;
- an analysis of the main problem determinants;
- a review of possibilities for interventions with their likely effects and applicability.

As projects should not duplicate existing initiatives, it is also important to give an outline of what has been done to date, in previous or parallel initiatives, and how the current project will build on this.

Aims and Objectives

The **aim** or **goal** of a project is a broad statement of the problem the project intends to solve. The aims may not necessarily be fully achieved by the project in itself, but the project should contribute to their achievement.

Objectives are derived from the aim, but are more specific, offering concrete statements of what the project will try to achieve in order to reach its aim(s). Objectives should be matched to the problem determinants identified in the problem analysis, and should be written at a level which allows them to be evaluated at the conclusion of the project. A well-worded objective will therefore be SMART:

- *Specific*: it should be clear about what will be achieved
- *Measurable*: it should be possible to quantify and measure the results when achieved
- *Achievable*: it should be possible to achieve the objective
- *Realistic*: the objective should be attainable within the project time and resources
- *Timed*: there should be a specification when the objective will be attained

Aims and objectives are the basis for choosing the method, planning the actions and implementing them. Throughout the project, objectives need to be revisited to monitor the progress towards their achievement. At the end, they will serve to demonstrate to what extent they have been achieved.

Target groups

Target groups are the persons or entities who will be positively affected by the project. They must be distinguished from intermediaries, who are also reached by the project but do not benefit from it. Instead, they are familiar with the target group and are expected to support the implementation process.

A target group specification should provide a definition of the target group, give features and inclusion/exclusion criteria, and provides information about demographic characteristics, needs and social norms with regard to the health problem(s), and the target group size (i.e., the numbers that will be reached by the project). For certain types of interventions it is also useful to segment the target group into subgroups based on relevant characteristics.

Approach and method

This section of a project plan describes the overall approach that will be taken to achieve the objectives. It should not be an elaborated work plan, but a concise description of what will be done and how. It should address:

- The *strategy and method* to bring about the intended changes. Methods should be explicitly linked to the objectives, in the sense that for each objective at least one intervention method is specified. The choice of methods should be based on the analysis of their effectiveness. Only those methods should be used for which empirical evidence exists that they are effective, and which are suitable and acceptable for the target group.
- The *scope and boundaries* of a project clearly indicate what will and will not be covered. The scope will be defined in terms of deliverables, users, departments, sites, etc. Also consider any constraints imposed by your institution that could affect the scope
- *Critical success factors* are factors on which the success or value of the project depends. A project plan should identify 3-4 processes or events that are crucial for the success of the project, emphasising the positive things that need to happen. To define these factors, it may help to think about the stakeholders and their expectations.

Outcomes, outputs and deliverables

Project *outcomes* are the changes that occur as a result of the project when the objectives are reached. They can be distinguished from *outputs*, which are products, services, activities, or attributes resulting from steps in the project implementation process. For example, an output of a vaccination campaign would be the number of people vaccinated, whereas the outcome would be the lower prevalence of the illness against which vaccination is done. A specific type of outputs are *deliverables*, which are physical items (i.e., reports, plans, tools, products) to be delivered by the project. Internal deliverables are produced for the purpose of executing the project, and are usually only needed by the project team and the commissioning authority. External deliverables, in contrast, are created for the target group and stakeholders.

Planning and organisation of the work

While the method gives a general description of the approach that will be taken to achieve the objectives, the planning should provide a comprehensive, logically structured and clearly written outline of the way in which the work will be organised. This should include:

- A detailed description of the different *tasks* of the project, incorporating both the horizontal tasks of coordination and management of the project (e.g., collection and distribution of information among the partners, monitoring and reporting of progress, communication and decision making within the partnership, etc.) and the vertical tasks,

which will lead to the project outcomes.

- A timetable with milestones, i.e. scheduled events signifying important decision making moments or the completion of deliverables, allowing a proper monitoring of the project

To organise the project tasks, they can be organised in a work breakdown structure, or a hierarchical tree structure decomposing a project into activities and sub-activities to help define and control the project and its elements of work. The main building blocks of a work breakdown structure are work packages, which can be considered as sub-projects and are composed of one or several tasks.

Organisation of the partnership

As projects are invariably team work and often involve different organisations, a project plan should pay attention to how these different players will collaborate to pool their expertise and capacities and achieve an added value. The description of the partnership should include information about the following issues:

- Extensiveness of partnership
- Synergy, i.e. the commonality of goals and objectives that could serve as a basis for collaboration within the partnership
- Network structure: what is the logic for involving specific partners?
- Competence: do the organisations and staff have the competence and expertise required for the project tasks?
- Leadership and authority: what is the division of responsibilities and tasks between the different partners in the project

Resource planning

Poor management of budgets and other resources may lead to unanticipated costs and even an inability to complete the project. It is therefore essential to make a careful estimation of the costs for the project and to provide for resources. Resource planning entails estimating the expected input in terms of human and financial resources necessary to achieve the project objectives. This includes:

- Human resource planning: a realistic estimation of the staff input, based on an estimation of which type of staff will be required for the tasks that are planned, and the anticipated number of working days
- Financial plan: a realistic estimation of the financial inputs, including a realistic estimation of sources of income (including allocated budgets, project-specific funds, as well as staff time and expertise), and the planning of expenditure over time

It could be kept in mind that foregoing other opportunities with the organization, partners, and the community at large are also costs.

Evaluation planning

While setting the direction for the project actions to be undertaken, the project plan also provides a basis for the project evaluation. Evaluation refers to the systematic appraisal of the merits of a project, both in terms of the process of implementation and in terms of its effects. As such, the project plan should provide an outline of how the quality of project implementation, outputs and outcomes will be evaluated. This involves the:

- Identification of evaluation needs in consultation with stakeholders
- Definition of evaluation questions
- Formulation of appropriate indicators to evaluate the quality of the implementation process and the effects
- Operationalisation of the indicators (the way in which they will be measured)

Dissemination planning

A project plan should also give an outline of how the visibility and sustainability of the project outputs and outcomes will be maximized. This “dissemination plan” should contain information on

- what will be disseminated (the message)
- to whom (the audience)
- why (the purpose)
- how (the method)
- when (the timing)

Further reading

- Bartholomew LK, Parcel GS, Kok G, Gottlieb NH (2006). *Planning Health Promotion Programs. An intervention Mapping Approach*. San Francisco: Jossey Bass.
 - Bollars C, Kok H, Van den Broucke S, Molleman G (2005). European Quality Instrument for Health Promotion User Manual. Woerden: Netherlands Institute for Health Promotion and Disease Prevention (NIGZ)
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 - Haughey D. (2009) Project Planning: A step by step guide. www.projectsart.co.uk
 - Health Promotion Switzerland (2009). Quint-essenz. Quality criteria for projects. Version 5.0. Bern: Health Promotion Switzerland. www.quint-essenz.ch
 - Project Management Infokit. Jisc Infonet. <http://www.jiscinfonet.ac.uk>
 - Williams M. (2008). *The Principles of Project Management*. Collingwood: Sitepoint.
- [PROJECT PLANNING CHECKLIST](#)