

# West Devon CVS

## Developing a project plan

### CORE09

There are many forms of planning documents including strategic plans, business plans, development plans and project plans. Whatever the size of your organisation, a project plan will help you organise your individual projects, clarify what you will do and how you will do it.

A project plan is a structured breakdown of your project, the need identified, activities to address this, timeframe, costs and resources required and how you intend to evidence its effectiveness

A written plan is essential if you are seeking funding. It is a way of demonstrating that you are competent in your work and can be trusted to use funds wisely.

Your plan should be concise, clear and practical.

### Future plans

The main body of your project plan will be concerned with the future. It often helps to break down your future plans into the following different levels:

<b>Time frame</b>	<b>Other names</b>	<b>Time span</b>	<b>Issues considered within the plan</b>
<b>Long-term</b>	Strategic plan	Up to 5	Future vision. This may change according to the results of reviews and the impact of political, economic, social and technological changes over the time span
<b>Medium-term</b>	Business plan	2-3	Implementation, evaluation and development
<b>Short-term</b>	Operational plan	No longer than 1	Set up, recruitment, monitoring and processes

### Long-term

Your long-term plan follows directly from your mission statement. This is your opportunity to really think through and spell out what you want to achieve.

Draw up a list of key priorities for the future. These are often called strategic aims.

Everything your organisation does should relate back to these strategic aims. This should help you avoid getting diverted away from your purpose, either by new funding sources or by your day-to-day problems.

### **Medium-term**

Your medium-term plan spells out in more detail how your strategic aims will be achieved and how much this will cost. This plan will include a budget, with a forecast of income and expenditure which should demonstrate the feasibility of what is proposed.

Funders often ask to see a medium-term plan before making any commitments to fund, especially if you are asking for a substantial amount of money.

### **Short-term**

This is the level at which you set out in even further detail the specific targets and tasks that you will carry out in order to meet your aims. It is a more immediate plan.

You need to think about:

- how each target can be achieved
- what tasks need to be carried out
- what resources will be required
- how your progress will be measured.

You need to prioritise your targets and decide on timescales for achieving each one.

Check back to your medium-term plan to make sure that all these tasks and targets will help you meet your strategic aims.

## **Content and Format**

The following headings are suggestions to give your plan a structure. However, these are not hard and fast rules and you should structure your plan in a way which feels appropriate for your organisation.

### **Executive Summary**

This should set out the key points in the plan, it should be written once you have finished and keep it to less than one page.

### **Introduction & Background**

Your project plan is likely to have a range of readers, from your own workers to external funders and potential partners. So remember that not everyone will be familiar with the background of your work.

The starting point is your 'mission statement'. This should express your organisation's broad purpose and values – in other words, why you exist. Your introduction should also include:

- a short history of the organisation, including relevant experience
- how you structure your management and administration
- a summary of current activities
- distinctive features of your work – in other words, how you are different
- how you are currently funded

### **Project summary**

This should summarise the aims of your project. It should include

- what the project hopes to achieve
- genuine, well researched evidence of the need for the project
- specific targets, outcomes and milestones
- how you will differ/work with others doing similar work

### **Project Management**

In this section try and answer these questions. How will the project be managed and who will do the work? Is your organisation up to this? Do you have experience of running projects or particular skills on your current staff or committee which can back this up?

### **Monitoring and Evaluation**

Your project plan should include methods for monitoring and evaluating your achievements. In order to evaluate a project successfully, you will need to set out a method for monitoring your work from the start. If you have received funding, your funder may require you to follow a formal process. Otherwise a more informal approach might be appropriate for you. Don't forget that this work can incur costs and needs to be included in the budget

Whatever method you choose, this information should be recorded in a format which will help inform and improve your future work.

### **Exit strategy**

If you are using your project plan to apply for fixed term funding, you need to demonstrate what will happen at the end of that time. This is called your exit strategy, and it is something funders are increasingly asking to see.

There are several strategies you could follow, for example:

- Your work will become self-sustaining by generating income
- Having demonstrated the need for the project you will seek further funding
- The work will be completed by the end of the funding period
- There will be a gradual wind-down
- Another organisation will take over the work

Whatever exit strategy you decide on, it will need to be planned from the start of the project.

## **Budget**

A certain amount of financial details will be required in the plan depending on the size and complexity of your organisation and what time-span the plan is for (see Future plans above). At a minimum, include a basic estimated income and expenditure account for the first year. If extra resources are required eg office space, a vehicle explain why they are essential.

For an introduction to drawing up a budget, see our information sheet CORE08, 'Understanding budget basics'.

## **Conclusion**

Simply pull everything together and summarize your success up until now leading to your future planned achievements and outcomes.

## **Appendices**

You may wish to include some of the following

- Extra financial breakdowns eg cash flow forecast
- Timetables and workplans
- Supporting materials evidencing need (keep this to a minimum)
- Evidence of management skills alongside list of trustees, staff structure

## **Expert tips**

- Be positive but realistic. Its fine to be optimistic but it must feel achievable
- Avoid using unusual fonts
- Avoid using jargon and watch out for assumed knowledge
- Get the budget right. Costs should be appropriate for planned work and must be accurate

If you need further help with drawing up your project plan, you can contact us at your local CVS for advice.

### **West Devon CVS**

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