Project Planning Worksheet

## Project Title**:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Scope & Sales

What are we doing? **(Brief explanation)**

We do what? (This is your activity in brief. Examples: Start a TEDEd Club, Implement a Library Orientation program, distribute a Library Communication piece, create a Student Advisory Team.)

For whom? (This is your target audience. Who benefits from the project?)

For what purpose or outcome? (This is the desired result of the project identified in succinct language.)

Project Statement (We do what + For whom + For what purpose)

Identifying the Target

How will it be done? (Briefly describe the kind of activities that will take place):

# What does success look like?

# How will we know we are “done” or on the right track?

# Is there are time/date by which this needs to take place?

# What staff/volunteers will be involved?

# What do we need to know/identify/learn to put together a plan?

Task Planning

1. List the tasks or activities that need to be done to accomplish the project. Refer to the notes on Page 2 to complete the list. Don’t worry about getting them in any order right away. List action items as an action or verb. For example, instead of listing “workshops” list the actions that result in workshops like “hire trainer,” “develop handouts,” and “order refreshments.”

2. If you have a team (staff and/or volunteers), list who will be responsible for doing each activity/task. If you don’t know the name, identify the role. Example: Director, Volunteer, Student.

3. For each activity/task, identify which are budget items. This is not the place to enter the estimated costs, just identify if there is a budget implication to completing the task with a ✓.

4. Are there any milestones among the tasks that will signal a significant step toward successfully completing the project? Indicate those in some way and remember to celebrate their completion to keep a team motivated.

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| **Activity/Task** | **Who is responsible?** | **Budget Item?** | **Target Date for completion** |
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Budget Planning

1. List the resources needed to complete the project. Resource include staff, equipment, and supplies. List the resource even if there is no cost associated with using it. It may be helpful to consider these prompts:

* How many staff or volunteers will we need?
* Will we need to contract with a person or company for some service?
* Will we need to buy paper, pencils, books, or other office supplies?
* Will we need special equipment not already available like computer, projector, microphone, scanner, or camera?
* Will there be travel costs?
* Will there be printing or copying costs?

2. For each resource, list the estimated costs. If there is no cost, indicate that.

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| **Resource (Staff, Equipment, Supplies, etc.)** | **Estimated Cost** |
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Stakeholders and Communication

1. Who are the Stakeholders? List the individuals or organizations that will be interested in your project. List them in the first column.

2. For each stakeholder, identify what it is they will be interested in knowing. Do they need a periodic update on activities? Do they want to know how the budget is doing? Will they benefit from the results of the project?

3. Identify the best way to communicate with the stakeholder. Will an announcement in a newsletter work? Email to faculty? Notice to parents? Something in the student newspaper?

4. Communication is an activity that needs to be accounted for in planning for budget and the project staff’s time. Return to the Activity/Task list to include the communication tasks.

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| **Stakeholders** | **What do they want to know?** | **How will they receive communication?** |
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Sharing Success

At the end of, and during, the project, stakeholders will want to know how well it succeeded. Consider the vision of success from Page 1 and the description of how you will know you are on the right track. Also consider what factors stakeholders will value in determining the success of a project.

1. List indicators of success. Examples: Students like the service, faculty appreciate tool, grades improved, time saved, etc.

2. For each success indicators, identify how you will measure it. Examples: pre- and post- survey, comment cards, grade reports, etc.

3. Identify the frequency or timing for collecting the evaluative information. Will it be weekly, once at the end of the project, twice during the project?

4. Evaluation activities are a part of completing the project. Return to the Activities/Tasks on Page 3 to include evaluation tasks.

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| **Success Indicators** | **Measurement** | **Frequency** |
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Implementation Schedule

Review the activities/tasks listed on Page 3. Some activities will need to take place in a particular order. Now is the time to sort these to create the implementation schedule. There are many options for creating the final schedule based on the activities list. Only a few of them include:

* Excel Spreadsheet – enter the activities and target dates for completion in a spreadsheet, then sort by date.
* Note cards – Write each activity on an index card or sticky note, then sort them in order.
* Calendar – Use a calendar to map out target dates.