

# PREPARING A PROJECT PLAN

*A Tutorial Self-Study Guide*

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A COMPANION TO THE INTERACTIVE TUTORIAL ACCESSIBLE FROM  
[HTTP://SLOSTC.ORG/TOPICS/PROJECT\\_MGMT/OVERVIEW.HTML](http://slostc.org/topics/project_mgmt/overview.html)

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# PREPARING A PROJECT PLAN

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## Overview

**Preparing a Project Plan** explains how to create a plan of action for a program or project. In the sequence of activities that follows, you'll discover the benefits and practical applications of using a project plan to help you chart your venture.

In the early stages, your plan will undoubtedly include placeholders that will evolve over time. You'll explore tools and templates that can help you start and expand your plan as information becomes known.

Upon completion of this self-paced tutorial, you will be able to use these tools to prepare a project plan to describe the vision of your completed project or ongoing program.

We hope you enjoy **Preparing a Project Plan!** We welcome your feedback and suggestions on any aspect of this tutorial.

## Accessing the online tutorial

The online tutorial is a Web-based training module that covers the same material presented in this self-study guide, and also includes interactive components and exercises. To access it, go to [http://slostc.org/topics/project\\_mgmt/overview.html](http://slostc.org/topics/project_mgmt/overview.html). Also refer to the Prerequisites and Requirements on page 2.

## Intended audiences

This tutorial is designed for broad participation, but focuses primarily on the project or program planning needs of people who:

- Develop products or services (such as technical professionals), and/or
- Work with programs or projects that serve community needs (such as nonprofit organizations).

## A note about terminology

The terms **project** and **program** appear interchangeably herein; however, a few distinctions may be in order.

- The term *project* often refers to an effort with a more distinct life cycle and time table, such as the design and development of a product.
- The term *program* often refers to an ongoing effort, such as a service provided by a nonprofit organization.

In either case, a **project plan** can help define the directions that a project or program may take.

## What Will the Training Cover?

### Goals of the tutorial



This module:

- Defines a project plan and explains its benefits and uses.
- Introduces and explains each section of the project plan template.
- Follows a case study example to convey various aspects of using the template.
- Presents three short stories that illustrate different outcomes for projects that used a project plan to varying degrees.
- Provides ways to apply your knowledge through assessments and exercises. For example, you have the option of preparing a plan of your own to earn a [Certificate of Completion](#) (see page 5).

### Objectives



After completing this material, you will be able to:

- Identify several valid uses for a project plan.
- Explain how the use of a project plan can benefit particular individuals or groups.
- Identify ways in which a project plan aided or could have helped the outcomes of hypothetical projects.
- Practice preparing plans for your own projects using a template and examples you can download in [Apply the Tools to Your Situation](#) (see page 27).

## Prerequisites and Requirements

Use the following guidelines to help make your learning experience more effective.

### Prerequisites

- To help you relate more effectively to the training material, some kind of experience working with a project is desirable.
- When taking the tutorial online, you should be familiar with your Web browser and with downloading, editing, and e-mailing files.

### Computing requirements for the online tutorial

Recommended configurations and components appear below; you may be successful with other variations. The online tutorial uses Flash, so your browser will require the Flash plug-in.

- Pentium-compatible machine (133 MHz or faster) running Windows XP/2000/ME/NT/98, **OR** a Macintosh running OS 9.x or later
- 32 megabytes (MB) of available RAM
- Super VGA display, 800 x 600 or greater resolution
- 10 MB of disk space

- Internet browser and access
- Microsoft Word (for editing the Project Plan template)

## Exercises and Assessments

This tutorial contains activities that will enable you to practice and apply what you are learning, as well as evaluate how well you are learning it in a self-paced mode.

### Exercises

Interactive exercises enable you reflect on what you are learning and apply it in practical ways. The exercise scores are not recorded; however, you are encouraged to complete the exercises to reinforce your understanding and skill development.

### Assessments and extended practice

How will you know if you learned something, and can apply it in a real context? Here are some ways to find out.

- [Assess What You Already Know](#). You will have the opportunity to measure your knowledge before going through the tutorial by taking the preliminary assessment. This assessment is a short set of questions about the material and is not designed to be intimidating. If it turns out that you already know the material, you can probably skip the tutorial!
- [Assess What You've Learned](#). After completing the tutorial, you'll have an opportunity to see how your knowledge has increased by taking the final assessment.
- [Apply the Tools to Your Situation](#). To help you transfer your new skills to an actual project, you can practice with templates and examples. These tools have been designed for you to adapt to your own needs. You can tailor the project plan template available from the tools page to create your own project plan, either real or hypothetical. By submitting a project plan after completing the tutorial, you can receive a [Certificate of Completion](#) (page 5).

## Tips on Making the Tutorial Effective

Here are a few tips to help you make the most of your learning experience. By proceeding at your own pace, setting your own goals, and accommodating your own learning style, you can take responsibility for the quality of your learning.

### Estimated time to complete

The tutorial should take only a few hours to complete. You may want to spend extra time working on a project plan of your own, for which you can earn a [Certificate of Completion](#) (page 5).

**Proceed at your own pace**

Self-paced training offers the opportunity to learn new subjects within your schedule. To make the best use of the material, we suggest that you devote a certain amount of time each week to this process.

**Set your own learning goals**

Identify what is important to you in this learning experience. Training objectives list some of key goals the tutorial intends to accomplish. In addition to the training objectives, try to make your activities real by doing the following:

- **Reflect** on the information by relating it to your current or past experiences.
- **Assimilate** the information, such as by keeping a notebook of useful ideas.
- **Apply** information from the tutorial by completing the exercises and by using the tools at the end to help guide your own projects.
- **Accommodate** your own learning style, as explained below.

**Determine your learning style**

You may strongly prefer one or more particular methods of absorbing information, such as those listed below. Try to concentrate your efforts in your preferred areas.

- **Visual-textual learning.** You prefer reading information in textual form, such as in paragraphs and tables.
- **Visual-diagrammatic learning.** You absorb information most easily when it appears in images, diagrams, and tables. If information is not presented to you diagrammatically, try summarizing the information in these forms.
- **Auditory learning.** You prefer hearing spoken information. Although the online tutorial does not use audio tracks, you may find it useful to review the key points aloud or discuss them with someone else.
- **Kinesthetic learning.** You enjoy being involved in a physical way with the subject matter. Taking notes, highlighting information, engaging in activities that require “doing,” and listening to background music while studying appeal to you.
- **Logical and analytical learning.** You enjoy games, puzzles, research, and data analysis. You might seek ways to apply your learning that involve researching and organizing information from your environment.
- **Intrapersonal learning.** You prefer to relate new information to your own experiences, a trait common to many adult learners.
- **Interpersonal learning.** You value collaborating with others to achieve learning goals. You should enjoy the discussion forums and real-time communication options.

## Certificate of Completion

By following the steps below, you'll be eligible for a Certificate of Completion.

- 1 Study the material.** Complete the tutorial exercises and assessments.
- 2 Apply your knowledge.** Write a real or hypothetical project plan for a project or program of your own choosing. Follow these steps:
  - Use the Microsoft Word template you can download from [http://slostc.org/tools/project\\_plan\\_template.doc](http://slostc.org/tools/project_plan_template.doc).
  - Complete all sections of the template, or indicate "not applicable" for the sections that do not apply. (Note, however, that most of the sections will contain some kind of information.)
  - Send your example project plan with a brief explanation via e-mail to [projectplan@slostc.org](mailto:projectplan@slostc.org).
- 3 You will receive feedback** and a Certificate of Completion.

For more information, see [Apply the Tools to Your Situation](#) on page 27. That's all there is to it!

## Assess What You Already Know

This preliminary assessment will help you determine the extent to which you might already be familiar with this information. It consists of a short set of basic questions. If you achieve a perfect score on the assessment, you can probably skip the tutorial!

To take the quiz online, which enables you to receive a score, go to [http://slostc.org/courses/pp\\_quizzes/pre\\_assessment.html](http://slostc.org/courses/pp_quizzes/pre_assessment.html).

### Instructions

Select the best answers to the questions below. If you are unsure of the best responses, you should probably proceed with the tutorial.

- 1** Check all that apply with regard to a project plan. A project plan is...
  - A document you prepare once your project is well underway.
  - A coordinating tool, planning aid, and communication device.
  - One of several documents that you may need to describe the scope of your entire effort.
- 2** A project plan is analogous to a business plan or strategic plan in what respect?
  - It explains how you will market your project or program.



- It helps you clarify your intentions before expressing them to others.
  - It is a document you present to a lender to request funding.
- 3 A previously prepared project plan can provide insights into what aspect of a future project?
- Possible areas in which to repeat past successes and apply historical lessons learned.
  - Primarily budgets and scheduling, which are usually similar for all projects.
  - None. Each project is distinct, which makes projects extremely difficult to compare.
- 4 What value can a project plan offer during an interview with a prospective client? Check all that apply.
- It can demonstrate that every project is exactly the same.
  - It can suggest similarities between a past project and a future project.
  - It helps create a rapid understanding of possible project considerations.
- 5 A project plan should do which of the following:
- Define your target audiences or beneficiaries, which may include your clients and customers as well as their clients or customers.
  - Avoid considering future variations of a project, and stick to what is known in the here-and-now.
  - Downplay any risks, as they will exist regardless of how carefully you plan.
  - Expand over time as more project information is revealed.

## Introducing the Project Plan

### What is a Project Plan?

A project plan is a **coordinating tool**, **planning aid**, and **communication device** that helps you and your organization, team, clients, or contractors define the crucial aspects of your project or program.

### Analogy

Think of a project plan as much like a [business plan](#) (see *Glossary on page 30*) or strategic plan in that it describes how you intend to operate with respect to your overarching mission. A project plan can help you distill your thinking before you reveal your intentions to others.

## Limitations

Unlike a business plan, however, a project plan typically does not contain the types of financial projections and analyses that enable it to be used, by itself, as a solicitation for funding, for example. A project plan can easily be expanded or paired with documents such as business plans or contracts to provide all of the details needed to explain the project to funders or clients.

## How Would You Use a Project Plan?

One important reason for using a project plan at the very start of a project is that it can help you clarify exactly what needs to be communicated in a request for funding, a bid, or a proposal.

- The plan does this by requiring you to specify your expectations in an organized and meticulous way.
- The more complete and meaningful your description appears, the more vivid an image of success you will paint in the minds of your readers or listeners.

And even if you are not seeking funding or otherwise bidding on a contract, a project plan can help you organize your ideas.

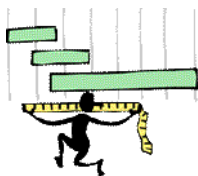
## Primary Uses of a Project Plan

Some of the primary uses of a project plan include:



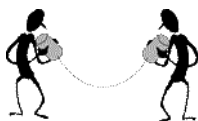
### Coordinating

A **coordinating tool** helps program or project team members agree on which elements of an effort are the most important, and how the elements interrelate with one another and with the project's goals.



### Planning

A **planning aid** enables team members to envision applicable milestones, phases, and priorities. The project plan can also stimulate the team's initial thinking about how to evaluate the success of the program or project.



### Communicating

A **communication device** helps generate a rapid understanding of what a project might entail. In a face-to-face discussion with a client or hiring manager about a future project, for example, you might use a sample project plan to explain a similar effort with all of its successes and lessons learned.

## Extended Uses of a Project Plan

Possible extended uses of a project plan include incorporating it as an attachment to, or an element of, a bid, contract, business plan, or other formal agreement.

Since the primary purpose of a project plan is for planning, extended uses might occur in the final planning stages when many of the details have been finalized. In those instances, you might:

- **Incorporate specific requirements** derived from RFPs (requests for proposal), clients, or funding agencies into the applicable sections of the plan. In this way, you can keep track of all of your sources of specified requirements.
- **Combine the project plan** with detailed schedules, outlines, signature pages, contract pages, or service agreements.

## Benefits of a Project Plan

The benefits listed below illustrate how various individuals or groups might experience specific advantages from using a project plan.



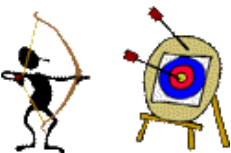
### Benefits for contract bidders

When preparing to write a bid, a project plan can help you create a clear concept of the work to be performed so that the ensuing project description will sound cohesive, compelling, and complete.



### Benefits for technical professionals

Previously prepared plans, as well as the project plan template itself, are excellent interviewing aids. They can help a prospective consultant or employee explain important considerations for a potential project to a client or hiring manager. Previous successes and lessons learned may provide insight into how to conduct a future project.



### Benefits for nonprofits

When seeking funding and resources from multiple sources, a project plan can help you crystallize your intentions and create well-defined target objectives.

Because various funding sources may request very different things in the way of information, it is especially important to remain focused on a single cohesive vision of your project or program. Without such a plan, groups seeking several funding sources for a single program might be tempted to request funding for very different-sounding projects that could have incompatible goals or schedules.

## The Project Plan Template

### Purpose

The **project plan template** provides a structured outline to help you identify the significant aspects of a particular effort to be undertaken. Whether you perform that effort:

- entirely within an organization
- with the help of outside parties, or
- as a consultant

the template can help you define the important considerations you will need for success.

### Outline

An outline of the sections of the **project plan template** appears below. The outline explains the project plan section by section.

[Section 1.0 Project/Program Description](#)

[Section 2.0 Goals and Objectives](#)

[Section 3.0 Intended Audiences or Beneficiaries](#)

[Section 4.0 Products to be Created \(If Any\)](#)

[Section 5.0 Services to be Provided](#)

[Section 6.0 Methods](#)

[Section 7.0 Anticipated Phases, Milestones, and Schedule](#)

[Section 8.0 Potential Partners or Collaborators](#)

[Section 9.0 Sources of Information and Expertise](#)

[Section 10.0 Required Systems and Equipment](#)

[Section 11.0 Tools, Templates, and Conventions to be Used](#)

[Section 12.0 Evaluation Processes](#)

[Section 13.0 Review and Approval Processes](#)

[Section 14.0 Method for Managing Changes and Derivatives](#)

[Section 15.0 Project Responsibilities and Dependencies](#)

[Section 16.0 Risks to be Managed](#)

[Section 17.0 Open Issues and Questions](#)

[Section 18.0 Appendices and Attachments](#)

The next several sections provide explanations and examples to illustrate how each section of the template can be used.

### Section 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?

### Section 1.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 1.0 Project/Program Description

In 1996, the Nonprofit Technology Assistance Agency (NTAA) of Mayberry County opened its doors to offer nonprofit organizations Internet services and assistance in conquering the “technology gap.” Many nonprofits lack access to or understanding of the latest hardware, software, and information technology (IT). In an effort to assuage this gap in our county, the NTAA piloted the TechAssist Program in 2002. With a six-year track record of providing effective, low-cost Internet services and training, the NTAA was poised to provide nonprofits additional valuable and much-needed help via the TechAssist Program.

People from the community who are interested in learning more about technology and sharing their knowledge volunteer as TechAssist consultants. They visit nonprofit offices to examine their computers and networks, make recommendations for short- and long-term solutions, and assist with repairs as needed. They can also help install software, tutor, and teach general classes or those tailored to a nonprofit’s specific need. TechAssist services are low-cost for those nonprofits who can afford to pay and free for those who cannot. Our mission is to enrich both volunteers and clients while encouraging a “pay-it-forward” philosophy.

## Section 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 underserved 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.

**Section 2.0 example:****Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County****2.0 Goals and Objectives****Primary goals:**

The TechAssist Program intends to become the primary technology service and training provider for community-based organizations in Mayberry County. By helping nonprofits reap the most from the technology and equipment they already have, and supporting them in devising technology plans and budgets, we can significantly narrow the “digital divide” that keeps nonprofits from fulfilling their highest potentials.

**Objectives:**

- By December 31, 2004, 10% of the estimated 950 nonprofit organizations in Mayberry County will have received TechAssist services of some type.
- By December 31, 2004, 25% will have attended computer training classes specifically geared toward nonprofit needs.
- Eighty-percent of TechAssist clients will be satisfied with their technology services and/or training, and will plan on using them again and recommending them to others.

**Section 3.0 Intended Audiences or Beneficiaries**

Who will be served by this project? Examples include customers, clients, clients' customers, recipients of services provided, communities, wildlife, students, specific segments of the population, and so forth.

### Section 3.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 3.0 Intended Audiences or Beneficiaries

Direct beneficiaries of the TechAssist Program comprise local nonprofits who first become members of the NTAA Support Network and then can demonstrate a need for at least five (5) hours of assistance in one or more qualifying areas. (Refer to [Section 15.0 Project Responsibilities and Dependencies](#).) Nonprofits participating in the pilot program have included the Mayberry Food Bank, the Mountain Ridge Animal Shelter, and Call Once Hotline. TechAssist has already received numerous testimonials and letters of thanks from grateful pilot participants.

Indirect beneficiaries of the TechAssist Program include the many clients of member nonprofits. These downstream clients receive much more efficient and effective community assistance from nonprofits who are able to devote their full energies to their primary missions.

### Section 4.0 Products to be Created (If Any)

- Examples of products 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 document called a [service agreement](#) (see *Glossary on page 30*).

### Section 4.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 4.0 Products to be Created

Although the TechAssist Program focuses primarily on technology services, the Program foresees the potential for developing turn-key business solutions from which many nonprofits can benefit. For example, a common need among the pilot program participants has been a database for tracking client services. The needs were so similar that we were able to derive a common specification that can be used for many future clients. This business product eventually can be offered for sale on a sliding-fee basis to TechAssist members and non-members alike, creating another source of revenue for the program.

## Section 5.0 Services to be Provided

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

### Section 5.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 5.0 Services to be Provided

The ongoing TechAssist Program services include:

- Assistance with technology planning and purchasing
- Computer, network, and software installation
- Business solutions, such as the design of simple databases tailored to nonprofit needs
- Technical repairs
- Internet connection and e-mail service support
- Telephone consultation, including emergency off-hours support
- General and customized training in the use of computing systems and applications.

To receive services, TechAssist members must demonstrate the need for at least five (5) hours of assistance in one or more qualifying areas. There is no limit to the total number of hours of assistance any member can receive.

## Section 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, then 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.



**Section 6.0 example:****Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County****6.0 Methods**

To address a full spectrum of nonprofit needs, the NTAA employs the following combination of approaches, of which the TechAssist Program is one important and integral part:

- A fully equipped training center with twenty computers, an LCD projector, and printer
- A full curriculum of technology-oriented training, with an emphasis on nonprofit classes
- A complete Internet Service Provider (ISP) infrastructure and menu of services
- Public access terminals in the building lobby
- The TechAssist Program with its separate testing and training area, which enables the volunteers to develop the skills they need to participate, including hands-on access to servers running Microsoft and Linux software.

**Section 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?

## Section 7.0 example:

### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

#### 7.0 Anticipated Phases, Milestones, and Schedule

We envision four distinct phases for the TechAssist Program, with the most crucial listed first. We anticipate seeking funding for one or more phases per fiscal year, as indicated below. A detailed schedule appears in [Section 18.0 Appendices and Attachments](#).

- **Phase 1 (2004-05):** Hire part-time TechAssist Program Director. A technically savvy individual with strong interpersonal skills will be needed to expand the TechAssist Program to reach many more nonprofits than its current pilot program serves. A Director could also provide technology support to nonprofits, as well as recruit, train and dispatch TechAssist volunteers to nonprofit clients.
- **Phase 2 (2004-06):** Upgrade systems and software in the NTAA training facility. The twenty outdated Pentium I computers with 15-inch monitors limit the types of applications that the TechAssist program can use for training, as well as the speed and viewing capacity for demonstrations and exercises. The addition of peripheral devices such as printers and CD-ROM drives would enable the Program to offer more types of training classes. (See also Section 10.0, Required Systems and Equipment.)
- **Phase 3 (2005-06):** Determine local nonprofit technological support needs. The NTAA plans to discover through focus groups and surveys which technological services and resources local nonprofits want and need most. Using this information, we can design and expand the TechAssist Program and services.
- **Phase 4 (2005-07):** Improve TechAssist Program awareness within the community. Crucial to the long-term success of this program will be a significant expansion of our advertising of the TechAssist Program benefits.

## Section 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?

**Section 8.0 example:****Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County****8.0 Potential Partners or Collaborators**

One potential collaborator in the TechAssist Program is a for-profit technical assistance provider, CompuVisit. This organization provides excellent fee-based services similar to the free or low-cost services offered by TechAssist. We are exploring a possible exchange arrangement whereby CompuVisit would refer local nonprofit clients to TechAssist for free or low-cost help during regular business hours. Reciprocally, TechAssist would refer clients to CompuVisit for fee-based off-hours technical support (the area in which TechAssist has the fewest resources currently allocated).

**Section 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, and research studies.

**Section 9.0 example:****Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County****9.0 Sources of Information and Expertise**

The NTAA will need consulting help in specific areas to set up the evaluation program. (See [Section 12.0 Evaluation Processes](#).) For example:

- A member of the Board of Directors who teaches at the local university will provide assistance with conducting focus groups to collect information on nonprofit needs.
- A volunteer technology expert will set up the TechAssist database for tracking client services, using the specification derived from experience with the pilot program.
- Other designated volunteers will provide input on the design and administration of satisfaction survey forms, as well as help with ongoing grant seeking activities.

## Section 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 or discussed in [Section 16.0 Risks to be Managed](#).

### Section 10.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 10.0 Required Systems and Equipment

The long-term plan per **Phase 2** of [Section 7.0 Anticipated Phases, Milestones, and Schedule](#) requires upgrading existing computers and adding peripheral devices. We have determined our equipment needs for 2004-05 as follows:

- **Hardware:** Ten 1.6 GHz computers with 256 megabytes (MB) of RAM, 20-gigabyte (GB) hard drives, CD-RW drives, network cards, and 17" monitors.
- **Software:** Ten copies of the Windows XP Operating System, plus one copy of a Microsoft Office XP License, all at nonprofit rates.

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

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

### Section 11.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

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

The TechAssist Program intends to develop a suite of templates for specialized client uses, such as predefined spreadsheet and database formats. Additionally, we plan to develop a series of Quick Reference Guides to provide a standard set of instructions for many common setup and usage functions, saving the nonprofit clients considerable time and effort in their TechAssist training and orientation sessions.

## Section 12.0 Evaluation Processes

Valid questions to answer in this section include:

- How will you evaluate the progress and effectiveness of your program or project?
- Will you be collecting information on how you are carrying out your stated objectives (process evaluations), and how well you are serving the needs of your target audiences (outcome evaluations)?
- Will you be using any outside evaluators?

### Section 12.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 12.0 Evaluation Processes

**Evaluation Milestones for Phase 1:** (See the related detailed schedule in [Section 18.0 Appendices and Attachments](#))

- **Needs assessment** (first quarter). Conduct a needs assessment with local nonprofits to determine what technological support services they need, using focus groups and a survey. We plan to conduct the assessment and analyze the data in the first quarter.
- **Program reevaluation** (second quarter). Based on findings from the needs assessment, we will fine-tune our technological support services and classes for nonprofits. After making the changes, we will begin evaluating the response to the revised program in the second quarter. We also plan to use pre- and post-service evaluation forms to collect regular feedback and demographic information from class attendees and users of our services.
- **Process evaluation** (mid-year). After we have been regularly collecting data with our evaluation tools, we will conduct a process evaluation via an analysis of the evaluation forms to monitor when, where, how, and to whom we are providing TechAssist services.
- **Outcome evaluation** (year-end). At the end of the program year, we plan to do an outcome evaluation to find out if we have met local nonprofits' needs satisfactorily. We will accomplish this via an analysis of the evaluation forms collected to date, a focus group study, and a survey similar to those used at the beginning of the program year.

## Section 13.0 Review and Approval Processes

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

### Section 13.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 13.0 Review and Approval Processes

The NTAA General Manager and TechAssist Director will develop a set of guidelines by February 2004 (see the detailed schedule in [Section 18.0 Appendices and Attachments](#)).

## Section 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?

### Section 14.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 14.0 Method for Managing Changes and Derivatives

The NTAA General Manager and TechAssist Director will develop a set of guidelines by February 2004 (see the detailed schedule in [Section 18.0 Appendices and Attachments](#)).

## Section 15.0 Project Responsibilities and Dependencies

List the parties that depend on one another to complete some part of the project. Key questions include:

- Who is responsible for producing the product(s); providing services; and providing equipment, resources, and training?

- Who will perform proofing, editing, supervising, translating, and the like?
- Will the organization or agency be responsible for making available any equipment, facilities, subject matter experts, and reviewers?
- Who is responsible for creating each specific set of products and for performing evaluations?

### Section 15.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 15.0 Project Responsibilities and Dependencies

The responsibilities and dependencies for **Phase 1** are included as part of the detailed schedule in [Section 18.0 Appendices and Attachments](#).

### Section 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?

## Section 16.0 example:

### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

#### 16.0 Risks to be Managed

We have identified the following risks with respect to the TechAssist Program (related to [Section 7.0 Anticipated Phases, Milestones, and Schedule](#)):

- The risk of not receiving any of the requested funding for 2004-05, which means that no part of the program can go forward. In this case, we would put the program on hold while we seek other funding sources.
- The risk of receiving only partial funding for any one phase, which means choosing among two or more critical needs. In 2004-05, the choice would involve deciding between replacing 10 computers and hiring the TechAssist Program Director. Most likely, we would pursue hiring the Director in 2004-05.
- The risk of not being able to adequately schedule and dispatch the trained volunteers. This concern arises from the challenges of conducting the pilot program, in which scheduling and providing transportation to client sites presented ongoing difficulties. To mitigate this risk, we may need to expand the collaboration we are creating with CompuVisit to include an equitable transportation-sharing component.
- A potential sustainability risk could entail considerable inconvenience to nonprofit clients if the TechAssist Program were unable to obtain funding past a certain point. Nonprofits who had come to depend on our free services might suffer considerably by having to seek fee-based services. No ideal mitigation strategy for this issue exists at this time.

## Section 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?

### Section 17.0 example:

### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

#### 17.0 Open Issues and Questions

NTAA's Board of Directors has been asked to research whether a broader partnership with other community-based agencies can mitigate the TechAssist Program sustainability risk. The board is scheduled to meet on this question in July 2004.



## Section 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, contract pages, and signature pages, for example.

### Section 18.0 example:

#### Hypothetical Nonprofit Program Example: The TechAssist Program of Mayberry County

##### 18.0 Appendices and Attachments

Proposed Detailed Schedule for Phase 1:

- **December 2004:** NTAA General Manager will recruit a TechAssist Director; the staff and volunteers will create a tracking database and develop a fee-for-service structure.
- **January 2005:** Development Manager and TechAssist Director will create a marketing plan, including a direct-mail brochure featuring quotes from pilot program participants.
- **February 2005:** TechAssist Director will revise the training program based on the survey data, recruit and train volunteers, and develop systems for dispatching volunteers and processing client intakes. General Manager and TechAssist Director will create guidelines for review and approval processes, as well as for managing changes to services.
- **March–May 2005:** TechAssist Director and volunteers will provide technology support services to nonprofits.
- **May 2005:** Consultant and TechAssist Director will conduct a process evaluation to monitor the delivery of services.
- **July 2005:** TechAssist Director will adjust services and training as needed based on mid-year evaluation results.
- **August–October 2005:** TechAssist Director and volunteers will continue providing technical support services to nonprofits.
- **October 2005:** TechAssist Director to send a letter to all nonprofits reminding them of the Program’s services and a free “Tech Tune-Up.”
- **November 2005:** TechAssist Director and General Manager to conduct end-of-year outcome evaluation, and complete and submit final reports for grants received.

## Examples of the Project Plan in Action

### Project Plan Case Studies

Following are three stories describing projects of very different types. Now that you are familiar with the project plan template, keep the content in mind as you review these stories. You will be asked to identify ways in which a project plan may have been used, or perhaps should have been used, in the initiation phase of each project.

- [Story 1: The Flora and Fauna Visitors Association](#)
- [Story 2: The Ergomizer User's Manual](#)
- [Story 3: Midnight Publishing](#)

### Story 1: The Flora and Fauna Visitors Association



The Flora and Fauna Visitors Association (or the FFVA) represents a work-in-progress that emerged from years of grass roots planning. A core group of volunteers from diverse areas in the community joined forces five years ago to establish a unique sanctuary for native plants and animals.

Integral to their vision is the notion that the sanctuary should be able to accommodate thousands of human visitors each year. Rather than excluding the public, the FFVA anticipates a highly accessible preserve full of lovely hiking trails and electric tram routes.

With careful planning and funding, the FFVA believes that the preserve will be a showpiece that will greatly benefit community residents and tourists alike.

#### The FFVA's Long-Range Vision

The FFVA volunteers realized early that many of their goals would require collaborators and partners. Funding sources were unknown at the start. To help attract the talent and resources they would need, the FFVA:

- Envisioned a ten-year, multi-phased project that would eventually encompass 100 acres of preserve.
- Mapped out a plan to seek funding for, develop, and then introduce one major section of the preserve in each phase.
- Created the overarching design plan but left many details open to allow flexibility in managing design changes in each phase.
- Sought partnerships with community agencies, charitable groups, and government organizations.

## The Implementation Process

Following the visioning process, the FFVA then:

- Used Phase One to build a visitors center and a one-acre, miniature version of the completed sanctuary.
- Sought contributions of time, labor, materials, funding, and expertise. At the same time, they received donated services from top-notch planners and architects, adding to an aura of longevity and credibility.
- Communicated their long-range plans to the public via brochures, tours, displays, educational events, and other promotions.
- Managed potential time, resource, and funding risks by designing each phase to be self-contained. Each phase will thereby exhibit its own special value, and need not depend on future phases to provide benefit to the community.
- Designed a community input and feedback collection system to remain apprised of the desires and needs of their target audiences.

## Reflection on Story 1

Consider the sections of the project plan template now that you have read Story 1: The Flora and Fauna Visitors Association. For this exercise,

- 1 Focus on the intent of two or three of the project plan sections. How has each been **applied effectively** in the story? For example,

*SECTION 3, PAGE 11*

- How did FFVA members identify the parties that could benefit from the project?

*SECTION 7, PAGE 14*

- Are they leveraging the series of planned phases to their advantage? How?

*SECTION 16, PAGE 20*

- How is the FFVA handling risk?

- 2 Now consider how a better use of two or three other project plan sections **might yet improve** the story's outcome as more information becomes available. For example,

*SECTION 15, PAGE 19*

- Are the key roles, responsibilities, and obligations for upcoming phases known?

*SECTION 17, PAGE 21*

- What are some outstanding issues and questions that could still apply to the project's remaining implementation?

## Story 2: The Ergomizer User's Manual



The Ergomizer therapeutic system is the brainchild of Ergomizer, Inc., a subsidiary of Kumfortzone International. This small piece of equipment helps people who have wrist and elbow problems stretch and relax their muscles several times a day. The patented device has won several awards from physical therapy and ergonomic associations, and now sells internationally.

Ergomizer, Inc. hired I. C. Klearly as an outside contractor to develop the User's Manual for this piece of equipment. He is expected to create a User's Manual and a Quick Reference Guide as part of the effort.

Klearly identified an eclectic customer audience for the Ergomizer system, including users with technical and non-technical backgrounds in all professions.

He generated a simple plan identifying his intentions for the project, but relied mostly on verbal discussions for an understanding of what needed to be done. Klearly gave Ergomizer, Inc. a fixed bid for the job, assuming that it would entail a small effort with no conceivable complications.

### Changes in the Original Expectations

No sooner had Klearly begun to work on the project than the following events occurred:

- His primary subject matter expert (SME), an engineer named C.U. Layter, abruptly left the company, leaving a large void in the engineering department.
- No one else was available to work with Klearly, so he decided to figure out how to use the device on his own. After many hours of practice, Klearly became proficient with the Ergomizer.
- Today, Klearly has learned from management that a design change is in progress. All of the documentation work he has done so far is about to become obsolete. His fixed bid does not take into account any rework related to design changes.
- The design change will cause Klearly to lose much precious time. Management is now insisting that the redesigned product must be shipped, along with a completed User's Manual, within three weeks of the new product announcement. The schedule is totally unrealistic, but Klearly can't do anything to change the schedule and still expect to be paid.

### Reflection on Story 2

Consider the sections of the project plan template now that you have read Story 2: The Ergomizer User's Manual. For this exercise,

[SECTION 4, PAGE 12](#)

[SECTION 3, PAGE 11](#)

[SECTION 15, PAGE 19](#)

[SECTION 16, PAGE 20](#)

- 1 Focus on the intent of two or three of the project plan sections. How has each been **applied effectively** in the story? For example,
  - How would Klearly have recorded his assumptions about products to be delivered?
  - Klearly seemed pretty certain of his target audience. How would he have documented that information?
- 2 Now consider how a better use of two or three other project plan sections **might have improved** the story's outcome. For example,
  - Could Klearly have used the section on project responsibilities to identify alternate subject matter experts in case his primary expert was unavailable?
  - How might he have used section on risks to be managed to list caveats, conditions, and assumptions about the project that could have given him justification to charge for his extra time due to the unexpected design changes?

### Story 3: Midnight Publishing



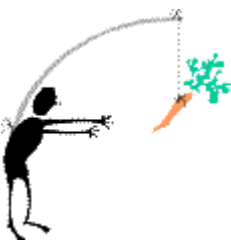
Midnight Publishing is a small nonprofit organization that helps other nonprofit groups produce printed matter, such as books and manuals, at discounted prices. The Midnight Publishing mission statement clearly identifies its goal to become the premier publishing service for nonprofit agencies.

After performing a marketing survey to establish the need for its services, the founders devised an operating plan. With an initial grant, private donations, and a skeleton crew, Midnight opened its doors in 1999 and now has fifty-two members.

To augment its membership fees, Midnight relies on yearly grants from foundations and corporations, especially those in the publishing industry. When the world economic situation became more challenging, Midnight started to seek more outside funding. However, the grants it has been receiving are becoming smaller, and some funding sources are no longer giving money.

#### Competing Goals and Objectives

Seeking grants from so many sources is creating the following challenges for Midnight Publishing:



- Each funding source typically requests a unique set of reports and reporting milestones.
- Each funding source requires a different evaluation process.
- The differences in funding cycles from each source dictate dissimilar fiscal calendars for each grant, which becomes very confusing to track.



- The proposals Midnight is now developing to request funds from all of these different sources are beginning to reflect numerous variations. In fact, they are so different from one another that they sound as if they are describing entirely different programs!
- Midnight is finding it next to impossible to operate an enterprise six or eight different ways, and wonders nostalgically how to return to a single version of its program. The staff is spending so much time tracking each unique set of grant requirements that it can't concentrate on its priorities.

### Reflection on Story 3

Consider the sections of the project plan template now that you have read Story 3: Midnight Publishing. For this exercise,

- 1 Focus on the intent of two or three of the project plan sections. How has each been **applied effectively** in the story? For example,
  - Has Midnight plainly identified its organizational purpose?
  - Does it appear that Midnight understands its target market and service orientation?
- 2 Now consider how a better use of two or three other project plan sections **might have improved** the story's outcome. For example,
  - How might Midnight have used the section on evaluation processes to document a single, internally driven program it can refer to in all grant proposals, minimizing the use of different methods?
  - Should Midnight now consider creating collaborations with similarly inclined groups to provide a more effective buffer for its funding shortfalls?

[SECTION 2, PAGE 10](#)

[SECTION 5, PAGE 13](#)

[SECTION 12, PAGE 18](#)

[SECTION 8, PAGE 15](#)

## Apply the Tools to Your Situation

You may wish to use the **project plan template** in your ongoing professional activities. Download and edit the Word template below to create your own real or hypothetical project plan.

And don't forget that you can earn a [Certificate of Completion](#) (see page 5) for submitting a plan!



- The **project plan template** (Microsoft Word version; see [http://slostc.org/tools/project\\_plan\\_template.doc](http://slostc.org/tools/project_plan_template.doc))



- A **sample nonprofit project plan** (HTML version; see [http://slostc.org/tools/project\\_plan\\_nonprofit.html](http://slostc.org/tools/project_plan_nonprofit.html))



- A **sample nonprofit project plan** (PDF version\*; see [http://slostc.org/tools/project\\_plan\\_nonprofit.pdf](http://slostc.org/tools/project_plan_nonprofit.pdf))



\*To open a PDF (portable document format) file, you must already have the Adobe Acrobat Reader installed. To download and install the free Acrobat Reader:

- Go to the following page on Adobe's Web site:  
<http://adobe.com/products/acrobat/readstep2.html>.
- On the page that opens on Adobe's Web site, follow the instructions to download the Reader for your machine.
- After downloading, double-click the file you downloaded to your hard drive, then follow the instructions at the prompts.

## Summary

The project plan is a document that acts as:

- A coordinating tool to help program or project team members agree on which elements of the effort are the most important.
- A planning aid to enable team members to envision applicable milestones, phases and priorities.
- A communication device that can help generate a rapid understanding of what a project might entail.

### Extended uses of a project plan can include:

- Becoming an attachment to, or an element of, a bid, contract, or other formal agreement.
- Collecting and keeping track of specified requirements from all sources.

### Benefits of using a project plan can include:

- Helping a nonprofit organization remain focused on a single vision of its program, especially when seeking multiple sources of funding.
- Helping a technical professional communicate the important aspects of a potential project to a client or hiring manager.
- Helping a contract bidder develop a clear concept of the work to be performed so that the bid will appear cohesive, compelling, and complete.

## Assess What You've Learned

This final assessment is designed to evaluate how well you have mastered the concepts in this tutorial. Similar to the Preliminary Assessment, it consists of a short list of questions. To take the quiz online, which enables you to receive a score, go to

[http://slostc.org/courses/pp\\_quizzes/fin\\_assessment1.html](http://slostc.org/courses/pp_quizzes/fin_assessment1.html)

**Instructions**

Select the best answers to the questions below. If you are unsure of the best responses, you should review the applicable sections in the tutorial.






- 1** Check all that apply with regard to a project plan. A project plan is...
  - One of several documents that you may need to describe the scope of your entire effort.
  - A coordinating tool, planning aid, and communication device.
  - A document you prepare once your project is well underway.
- 2** A project plan is analogous to a business plan or strategic plan in what respect?
  - It helps you clarify your intentions before expressing them to others.
  - It is a document you present to a lender to request funding.
  - It explains how you will market your project or program.
- 3** A previously prepared project plan can provide insights into what aspect of a future project?
  - Primarily budgets and scheduling, which are usually similar for all projects.
  - Possible areas in which to repeat past successes and apply historical lessons learned.
  - None. Each project is distinct, which makes projects extremely difficult to compare.
- 4** What value can a project plan offer during an interview with a prospective client? Check all that apply.
  - It helps create a rapid understanding of possible project considerations.
  - It can demonstrate that every project is exactly the same.
  - It can suggest similarities between a past project and a future project.
- 5** A project plan should do which of the following:
  - Downplay any risks, as they will exist regardless of how carefully you plan.
  - Expand over time as more project information is revealed.
  - Define your target audiences or beneficiaries, which may include your clients and customers as well as their clients or customers.
  - Avoid considering future variations of a project, and stick to what is known in the here-and-now.



## Appendix A: Resources

To augment the information provided by this tutorial, try exploring the links to resources and related information below.

### Links and materials for this tutorial

-  ■ The **online tutorial** (Preparing a Project Plan) - see [http://slostc.org/courses/project\\_plan\\_tutorial/](http://slostc.org/courses/project_plan_tutorial/)
-  ■ The **self-study guide** for the tutorial (this document) - see [http://slostc.org/tools/project\\_plan\\_guide.pdf](http://slostc.org/tools/project_plan_guide.pdf)
-  ■ The **project plan template** (Microsoft Word version) - see [http://slostc.org/tools/project\\_plan\\_template.doc](http://slostc.org/tools/project_plan_template.doc)
-  ■ A **sample nonprofit project plan** (HTML version) - see [http://slostc.org/tools/project\\_plan\\_nonprofit.html](http://slostc.org/tools/project_plan_nonprofit.html)
-  ■ A **sample nonprofit project plan** (PDF version) - see [http://slostc.org/tools/project\\_plan\\_nonprofit.pdf](http://slostc.org/tools/project_plan_nonprofit.pdf)

### Organizations

Professional societies for project management include:

- Project Management Institute (PMI) - see <http://www.pmi.org/info/default.asp>
- Association for Project Management (APM) - see <http://www.apm.org.uk/>

### Books and Software

- [How to Run Successful Projects III: The Silver Bullet](#) by Fergus O'Connell (2001, ISBN 0-201-74806-1)
- [Project Management](#) by Gary R. Heerkens (2001, ISBN 0071379525)
- [Managing Multiple Projects](#) by Michael Tobis and Irene Tobis (2002, ISBN 0071388966)
- [The PMI Compendium of Project Management Practices](#) by the Project Management Institute (2003, CD-ROM of software and templates, ISBN 1930699026)

## Appendix B: Glossary

### business plan

A business plan gives an overview of an organization, the plan for its future, and its financial picture. A business plan includes a description of the products and services, target market, sales and marketing strategy, financial documents, and management team.

**program**

A program often refers to an ongoing effort, such as a service provided by a nonprofit organization.

**project**

A project often refers to an effort with a distinct life cycle and time table, such as the design and development of a product.

**project plan**

A project plan defines products and services to be provided, records planning assumptions and decisions, facilitates communication among stakeholders, and identifies scope, risk, task, schedule, resource, and schedule considerations.

**service agreement**

A service agreement is a contract between a service provider and a client that outlines the services provided, the costs for the services, and the tasks to be accomplished by all parties to achieve the desired goals and outcomes.

## Appendix C: Course Evaluation

Please provide your candid opinions of this tutorial. You can do so electronically as follows:

- Go to the following URL:  
[http://slostc.org/courses/project\\_plan\\_tutorial/conclusion/evaluation.htm](http://slostc.org/courses/project_plan_tutorial/conclusion/evaluation.htm).
- On the Course Evaluation page that opens, copy and paste the text of the questions into the body of an e-mail message addressed to [onlinecourses@slostc.org](mailto:onlinecourses@slostc.org).
- In the e-mail message, type or select your responses.

The questions from the Course Evaluation appear below.

~~~~~

- 1 How well do you feel the tutorial met the stated objectives?  
Very poorly.....Not very well.....To some extent.....Very well
- 2 How easy was the material to understand?  
Very difficult...Somewhat challenging...Fairly easy...Very easy
- 3 Did the tutorial provide enough information to adequately cover the topic?

**Not at all.....Not very well.....To some extent.....Very well**

- 4** Do the tools and examples look as if they will be useful job support aids?

**Not useful...Minimally useful...Somewhat useful...Very useful**

- 5** To what extent do you feel ready to begin using the tools and information in your real-life projects or programs?

**Unprepared...Not very ready...Somewhat ready...Very ready**

- 6** Would you recommend this tutorial to others?

**Definitely not.....Not likely.....Possibly.....Definitely**

- 7** Please offer any other comments about the tutorial, including any suggestions for improvements.

Thank you very much for completing this tutorial! Your valuable feedback will help us refine the course for future participants.