A Checklist on Project Planning

1.   Identification of needs

1.1   Describe the need(s) you want to fulfil or the problem(s) you want to solve.

1.2   Describe the group which has the need.

1.3   Do you need to conduct a more detailed needs assessment to gain a more precise analysis? If so, will you do this before the project, or can this be one of the activities of the project?

1.4   How does fulfilling the needs of this target group contribute to meeting the needs and objectives of your own organisation?

1.5   Can you expect support from your own organisation in developing the project?

2.   Definition of objectives

2.1   Define objectives for the project in terms of the particular needs you have identified.

2.2   Consider how these objectives relate to the objectives of your own organisation.

2.3   Make sure that the objectives are formulated as precisely as possible. Are they measurable? Can you use them effectively as yardsticks to help you evaluate success?

2.4   If the objectives involve broadening the scale of some existing activities, discuss your ideas with the people who would be involved in the development.

2.5   If the objectives involve obtaining additional expertise from outside the organisation, check your proposal with prospective partners.

2.6   If the objectives involve developing new activities, check your proposal with those involved in organising the activities.

3.   Considering feasibility

3.1   How much of the project can your own organisation deliver?

3.2   Are there problems which your organisation is likely to experience in relation to the project?

3.3   If the problem is a shortage of **money**, you will need to look for co-financing. The possibilities include:

> European Union / banks /national government / branch organisations / sister organisations/ foreign organisations / international organisations.

Think carefully about which would be the best source of co-finance.

3.4   Request detailed information from any co-financier(s) you think might help. For example:

- Guidelines or conditions for a proposal to a European Commission programme via the national advisory or information body or from the programme web site.
- Arrangements with possible partners who might make their own financial contribution.

3.5   If the shortage is **people**, you will need to approach partners or sub-contractors.   (N.B. Not every co-financier is happy with external sub-contracting.)

3.6   Think carefully about who would make a good partner in the project. What range of skills and abilities will you need to achieve the project?

3.7   Ask potential partners for their views on collaboration. Set out your ideas as far as you can. If there is a positive response, discuss what skills they have and whether they would be in a position to participate.

3.8   If the shortage is **materials and/or equipment,** consider whether it is possible to rent during the period of the project.

3.9   Consider whether your organisation has gathered enough basic **information** to start the project. If not, you will need to undertake some further research.

3.10   Consider whether your organisation has the **necessary infrastructure** to handle the project. If not, is it possible to establish this? Do you have the requisite authority to do this?

3.11   Check the **commitment of colleagues** within your organisation and ask them directly if you can count on their practical cooperation. Specify what their contributions would be.

3.12   Check that colleagues outside your organisation understand fully what their involvement would be. Ask them what contribution they think they can make to the content of the project. Ask them to think about the time and costs involved, including wage costs.

3.13   Evaluate the feasibility of realising the project. Analyse the key risks involved if you go ahead, and identify ways to reduce or avoid them.

4.   The workplan and schedule

4.1   Identify the **scope of the project**. What are the boundaries? What is included/excluded?

4.2   What work must be undertaken to achieve the planned outcomes of the project? Don't just think about the central development work, but also about other contributory tasks, such as management, evaluation, dissemination and exploitation.

4.3   Make a basic **flow chart diagram** of the project. Start by breaking the project into major areas of work and make a plan of the overall structure. Then produce a **task breakdown**.

4.4   Estimate the time needed for each task. Schedule each activity and make a **Gantt chart**. Review and amend this, until you have produced a workable schedule.

4.5   When you have drawn up a satisfactory schedule, think about possible problems and how you might approach them. Build in an element of flexibility. Consider your priorities in terms of time, cost and quality.

4.6   **Allocate resources** to the tasks and produce a set of task resource sheets.

4.7   Make sure that you communicate carefully and fully with all the partners about the detail of the schedule, so that everyone understands the planning.

5.   Preparing the organisation

5.1   Establish who will take responsibility for deciding whether or not to proceed with the proposal.

5.2   Who will take **decisions** about what, during the execution of the project? Which decisions will be taken by the project coordinator, and which by other partners?

5.3   It is advisable to establish a **Project Management Committee**. You may also wish to appoint an advisory group for the project, drawing together people with particular expertise and experience.

5.4   As you come to appoint people to the project team, with particular tasks, make sure you have a clear set of criteria.

- Can they achieve the desired product quality?
- Can they work to a deadline?
- Can they accept fewer outcomes than they originally envisaged, if there are problems?
- Can they handle stressful times?
- Can they respond flexibly in uncertain situations?
- Are they good communicators?
- Can they work in a disciplined way to achieve the project outcomes?

5.5   Draw up a clear set of **roles and responsibilities**.

6.   Budget issues

6.1   To estimate costs you need to have information on the normal labour costs of your own organisation and of the other organisations involved.

6.2   You will also need to estimate costs for other elements, such as materials, travel and equipment hire. You would do well to gain some understanding of your own organisation's system of accounting and bookkeeping.
(N.B. International projects are often expensive in terms of translation, interpreters, travel and hotel accommodation.)

6.3   Start by costing the individual tasks, then work up via workpackage costs to the overall project cost. Then prepare a cashflow forecast and note any periods when partners will need to finance a cashflow deficit. When you have reached a final costing for the project, consider whether this is feasible for your own organisation.

6.4   When you have reached an internal consensus on the budget, consider what you will do, if the maximum grant you are counting on is reduced.

6.5   Check that the partners are in a position to pay their contribution. How will they demonstrate this?

7.   Planning for quality

7.1   What will be the key criteria for quality and the main performance indicators? Consider each task in terms of both the quality of any products and the quality aspects of the working process.

7.2   Consider carefully the interface or hand-over point between different partners' contributions. What can you do to ensure that there are shared understandings about what will be accomplished, so that expectations are fulfilled?

8.   Preparing an information and communication strategy

8.1   Make a list of the key kinds of information, documentation and communication your project will demand. Who will be responsible for producing them? Who will they need to be seen by? Draw up a plan of communications and circulation.

8.2   What will be the main channels of communication for the project? What kinds of meeting is the project likely to generate?

8.3   Decide on the working language(s) and what you will need to do to support communication between partners speaking different languages.

8.4   Consider where and how the key information base of the project will be located, how information will be classified and referenced, and how it will be accessed.

9.   Preparing evaluation and dissemination

9.1   Consider how the project will be evaluated and at what points. Evaluation can be conducted by different people: by a contracted organisation, by the project team, by each partner organisation, by an advisory committee and/or by the project target group.

9.2   Consider both **formative evaluation**, which can feed into the development of the project, and **summative evaluation**, which will principally be retrospective and concerned with the results of the project.

9.3   Think also about how the results of your project can be disseminated and exploited and draw up plans for this.

Once the proposal is in a final draft form, circulate it to your project partners for their final acceptance and request a letter of intent. Then send the proposal, together with the letters of intent, to the co-financier. (N.B. Make sure all the forms are completed correctly and signed, that you send the requisite number of copies, and that you meet any submission deadlines!)

10. Directly after the decision on funding

10.1   If the funding body gives the proposal full approval, then the process of agreeing a contract begins. In addition to the contract with your funder, you will need to prepare detailed contracts between your organisation and your partners and any sub-contractors. Make sure that these set out clearly the work and financial contributions expected; benefits accruing to the partner, including any rights in products; and procedures in the case of default.

10.2   If there is a negative decision on financing the project, try to find out the reasons. Explore whether re-submission in an amended form would be possible.