



WORK-BASED PROJECT PLANNING GUIDANCE

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ACCIPIO

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Project Planning & Guidance Document

Introduction

As part of your course you will need to create a robust and memorable portfolio of work that meets the criteria for the apprenticeship end point assessment. This will be submitted to your end point assessor ahead of your discussion and will form the basis for that discussion. The more confident you are around the topic the easier it will be to pass that area of the assessment.

With any projects you are or have been involved in you will realise that it not only allows you to demonstrate a range of skills, knowledge, and behaviours but also allows you to reflect on the successes and look at any shortcomings. By completing and documenting a project you will be able to discuss that project in good detail.

This planning and guidance document will aid you in covering all of the areas needed to show a comprehensive portfolio and a detailed account of all the planning, undertaking and reviewing of the project.

This document is meant as guidance, your project may have more elements that you would like to add, parts that are less relevant and or not applicable so please ensure you use this as a guide only.

Your TAC is available to offer further guidance if you need it.

Good luck with your project!

PROJECT PLANNING

Idea Generation/Screening

Title

- Name the project - Something simple but memorable and logical
- Ensure this is specific and linked with a goal

Aims

- Have a clearly distinguished difference between your aims and objectives
- **The aims:** These are the primary driver for any development or improvement project. They state what you intend to achieve and what the end result should look like. The aims tell you what the intent of the project is but not how you will achieve it, for that you need objectives
- **The objectives:** These are the tasks that we set ourselves to help us to achieve our aim. There can be many objectives, which is usual, but the important thing is that they are predetermined and support the aim.

Scope

- What will it include? What won't it include? (Be mindful of the project creep)
- Who is the project likely to affect? (You/Others in your team/other departments)
- What is the expected outcome?
- Is that affect dependent on the success of the project? If so detail the differences
- Change management should be mentioned here; however only a brief summary as full heading later on in the document.
- Describe how you are going to apply project management tools to set up and manage your project.

Assumptions/History (Support with Solid Data)

- What is the problem?
- Who does it affect?
- When does it happen?
- Why does it happen?
- How does it affect the process?

Concluding statement

- How will the project help the company? (Consider cost/quality/delivery)
- How does it fit into your company goals/ethos? (Refer to mission statement or goals)

OBJECTIVES AND PHYSICAL PLANNING

Preparing the logistics

Deadline/Timescale (Use SMART targets)

- What is the overall deadline for the project?
- Is this a business set deadline or is this a deadline you have set?
- Is this deadline realistic? Do you need extensions?

Resources (Consider costs/environment/equipment)

- Describe and discuss your available resources – Do you think you have enough? Do you need more/less? Have they been confirmed? (verbal or written agreement)
- Resources can be in many different forms including but not limited to;
- People – Staff, volunteers, agencies
- Money – budget, spending limits (Only summarise here as more space below to go into more detail)
- Systems – Documents, archives, software and data
- Time – Hours per task/project

Legalities

- Does the project require any legal procedures to take into account? Please explain each area relevant to your project and how you have met and checked it meets the legality. You may also want to review the data protection/health and safety/equality and diversity legislation and refer to it.
- Is there data being used? Confidentiality and Data Protection?
- Health and Safety? (making area safe/isolating power)
- Equality and Diversity
- Insurances
- Permits required?

Risk assessment

- Risk assessments can assist you in trying to reduce the chance of physical risk during a project. You may have one for the whole project or multiple assessments for different areas of the project.
- Please detail which models you have used
- Why you have used it?
- Conclude on the risk level and any changes made to reduce it
- Contingency plans

Risk/Scope assessment

Although risk is usually thought of as physical please also review the risk of;

- Stress/emotional
- Change
- Impact on the company of success or failure of project
- What plans do you have in place to manage/monitor/reduce the risks identified?

Collaborations

- Do you need to work with any other people?
- Do you need other departments to assist or take lead on certain areas?
- Do you need to enlist the help of other companies or outside organisations?
- If so please detail the contact, processes and plans to manage the process and relationship – you could also include any agreements and costs etc. (evidence communication)

Budgets

- What is your budget? What will this include? What won't it include?
- Are there any extra funds available if needed? (Contingency plans)
- How are you going to manage/manage the budget? What system are you going to use?
- Do you think the budget you have been given is enough to cover the project?
- Does the budget affect your project plans in any way? (Consider the level of Improvement)

TIMINGS/ACTION PLANNING

Planning the Methodology

Breakdown your project into tasks (Be clear)

- You will need to use your planning from the above guidance to breakdown tasks that need to be completed in order to complete your project on time and within budget.
- Your project should be split down into simple manageable and measurable tasks. Each task should have its own deadline, set of objectives, as well as a measure, including a review date and if you think it is needed a further contingency plan if that deadline is not met.
- You may want to use formats that already exist for this - I would suggest a GANTT chart.

Set SMART targets (for the overall project and individual tasks)

- As described above each task should have a SMART target, this will assist you in managing the task, as well as the person or process you have to manage. By setting targets in this manner you can create an efficient system where both parties understand targets clearly.
- Set each task clearly following the SMART acronym. Specific, Measurable, Achievable, Realistic, Timed.

Setting KPI's

- In order to make sure your project is on track there is usually a need for KPI's to be set. These are Key Performance Indicators. They allow you to focus on certain targets to get a measure for how well you are heading towards your goals. If your project has a link to an already defined KPI then you can review this KPI to check on progress. You may also set your own KPI's within your project, in the majority of cases budget, time, and productivity (missed deadlines etc.) are the usual ones.
- With each set KPI please detail it and explain why you have set it, as well as how you are going to measure it, also include later what results came out and what actions were taken from the reviews.

Training needs

- With a new project it is a likely you are introducing a new system, way of working, or change. With any of the previously mentioned areas of focus it is likely there will be some training need for yourself or staff working with you.
- Detail the training needs – (make a training plan)
- How are you going to fit the training in?
- How long will it take and who needs it?
- Plan accordingly, making the level of change clear

Managing Change

- Change management is an important part of your project as there is likely to be change.
- You must detail how you have prepared people for that change
- You must also detail how you have assisted people who are finding the change more difficult

Creating Buy In

- How are you going to encourage people to follow a new system? (audits/checks)
- How are you going to get people to buy in?
- What are you going to do with people who are not dealing with the change well or not buying in to the new system or project?

What data will help manage the process?

- What data is there available during the project? (consider feedback)
- Is there historical data to compare to?
- What data will you need, does it exist or are you going to have to create it?
- How will data help you to make and justify decisions?

METHODOLOGY

During the Project

Methodology/Process

- Compared with your planning documents and SMART targets please detail;
- What you did for each task
- What goals you set and how for each task within your project
- Processes followed.

Periodic review of process and progress

- Throughout the project continue to review processes and targets and update plans accordingly.
- Please document these reviews, how they happened and outcomes.
- These can be formal reviews at set intervals, or they can be less formal check ins.

Document any changes

- Please log and discuss here any changes you made from the results of the reviews
- Any changes to targets, dates, improvements, or compromises made.
- Demonstrate how you have passed that information onto your management team to keep them updated on progress as well.

Budget checks

- Please document regular budget checks and demonstrate how you have passed that information onto your management team to keep them updated on progress as well.

RESULTS

After the Project

Final results

- Detail the final results of the project
- Refer to your aims and discuss each aim and objective focusing on how successful the project was in meeting those aims.

Deadline

- Discuss in detail here about whether you met the deadline
- Whether individual tasks met the deadlines
- Did you have to change any deadlines?
- What was the cause of missing deadlines if they were missed?

Budgets

- Report on the overall budget
- Where money was spent and how?
- How much was spent on what areas
- What areas were on budget, over budget or under budget?
- What effect did the above have on the overall project?

Reports

- What final reports did you produce to show effectiveness of the project?
- What KPI's data did you collect to show results?
- Evidence the project results.
- Good practice to have signed by management

Team engagement

- Discuss your team's engagement in the project.
- Detail and discuss buy in level and how well you think the process/project has been accepted
- Discuss change management successes.
- Distribute praise where possible.

Handover

- Please document how you have handed the project over to the person who is going to oversee the continuation of the project for the future.

CONCLUSION AND REFLECTION

Reflecting on Successful Projects

Formal conclusion

- Please write a formal conclusion for your project summarising the plan, the process and the results.

Reflection

- Please reflect on your project and analyse some of its successes and shortcomings. Please include ideas on how to improve further in the future and in particular your learning from the project. Include any new skills, challenges you overcame, and areas you have developed within yourself and the team. Please ensure you also;
- Reflect on successes (What went well?)
- Reflect on areas less successful (What went wrong?)
- What changes would you make if you did it again?
- What suggestions would you give to the person who you hand over to?
- Is the project now autonomous?
- Is there a need for further work on the project or continued development?

Enhanced skills

New skills/behaviours developed

- Please discuss any new skills or behaviours you feel you have developed during this project
- How have you applied these skills within your own role as a team leader?
- How will you apply these skills in the future?

TIPS AND LAYOUT

Layout

- This document should be created as this one is, there should be;
- Title page
- Contents page
- References if needed
- Appendices if needed
- Glossary if needed
- The document should be spell checked and proof read before submission
- Text and fonts should be professional
- All wording should be professional and formal
- Page numbers as well as your name in the footer

Tips

- Your replies and answers to each point should be concise and not contain unnecessary information – try not to waffle.
- Please explain each point in terms that are understandable – do not use jargon or internal business terminology
- Plan in time to complete the write up as well as the project
- Log as you go – keep records of all reviews and conversations to assist this documentation
- If you have any questions, ask
- You can use screenshots, budget sheets, reports etc. But please ensure you do not show any confidential data on them.