

Initial Planning template

Keep a record of the group's initial planning stage to submit with your assessment as evidence. You may modify this in any way to suit your purposes, just make sure the evidence you submit at the end of the project will still meet the assessment criteria.

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| Project Name | |
| Project organiser | |
| Project overview Briefly describe project, event or activity group has decided to plan and implement. <ul style="list-style-type: none"> • <i>What it is?</i> • <i>When and where?</i> • <i>Who is involved?</i> | |
| Reason Briefly explain why participants selected this particular project, event or activity. | |
| Background List limitations you put on the scope of the project (participants select a project within the limits you impose). Also, any reasons for imposing limitations – participant age or capability, organisation or legal restrictions, etc. | |
| Stakeholders List stakeholders impacted by the participant selected project. <i>Put into three impact groups – high impact, medium impact, low impact</i> | High impact stakeholders |
| | Medium impact stakeholders |
| | Low impact stakeholders |

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| | Any stakeholders with special needs or situations |
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| | Any stakeholders who must give permission for project to happen |
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| Resources List the resources group would need to carry out project, can include: <ul style="list-style-type: none"> • money • equipment • materials • people • expertise • locations or venues • transport • time • any other resources | |
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| Risks List any initial and obvious risks to the project under these categories. | Health and safety |
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| | Money – costs, etc. |
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| | Schedule – time, limitations, etc. |
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| | Conditions – weather, venues, etc. |

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| | People |
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| | Any other potential risks |
| <p>Overall objective and SMART goals List overall objective for the project (participants' perspective) and the SMART goals created by the participants.</p> | |
| <p>Roles and expectations List roles and their expectations as determined by the participants.</p> | |
| <p>General expectations List of expectations that apply to everyone as created or cocreated with the participants.</p> | |
| <p>Your role Define your role in the project and what the participants can expect from you.</p> | |

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| <p>Milestones and timeframes List milestones identified at this stage of the planning.</p> <p><u>Useful resource</u> Download the Four-week project timeline from Microsoft in Excel. This template is a simple overview of the timeline that you can update as you get more information. Change text in the template to suit your purposes. Four week project timeline (office.com)</p> | |
| <p>Other List any other decisions made as part of initial planning specific to your context or to this project.</p> | |

Document control

Note and date changes here to have one master copy of your initial planning document that you can update as you go through the project planning process.

| Version # | Change Description | Date | Author |
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