[INSERT ORGANISATION NAME/LOGO]

[Project title]

[Project Proposal/Plan]
[Month Year]
Version [X.X]

## Abbreviations

[List commonly used abbreviations]

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***NOTE\****

*This template is intended to be used to write up a project proposal/plan for large projects. It contains section headings to capture the diversity and scope of projects that the organisation undertakes. It may not be necessary to include all sections in every project proposal/plan. The length and level of detail of the project proposal/plan should be proportional to the size, scale and stage of the project (i.e. initiation or planning). Refer to Project Management Process Map for documentation requirements. Add further headings as required and remember to delete instructive text.*

*\*Delete this note before finalising the plan.*

## Introduction

[What is the purpose of this document? Provide an overview of the project and what is included in the Project Proposal/Plan.]

## Background

[Why is the project being undertaken? Summarise the background/purpose, including:

* the opportunity, issue or problem that the project seeks to address (e.g. practice gap)
* how needs were identified (e.g. literature review, member survey)
* the intended outcomes/benefits for the organisations, clients, and/or stakeholders.
* how the project relates to other organisational, state, and national strategies/policies/programs]

## Project Objectives

[What outcomes, changes or benefits are sought by undertaking the project? Outline project objectives.

Objectives should be taken from/informed by the organisation’s Strategic Plan and/or the project’s Funding and Performance Agreement.

Objectives should be:

* Specific: They should be simple and clear. Make sure they clearly identify what you want to achieve through the program and with whom.
* Measurable: They should be tangible. They need to be written in a way that allows them to be easily assessed as having been met or not.
* Achievable: They should be achievable within the resources and time available for the project. If objectives and outcomes aren’t possible, it will simply make the project look like it’s not working.
* Realistic: Make sure that the objectives are practicable and that they align with one or more of the program outcomes.
* Timebound: They should have a time limit on them. Without a time limit, objectives and outcomes can never be assessed as not having been met.

For guidance on writing measurable objectives, refer to this [tip sheet](http://www.health.vic.gov.au/regions/southern/downloads/Tip-sheet-writing-measurable-objectives.pdf) from Department of Health, Victoria (2010).

For large/major projects and projects aiming to achieve practice change, consider developing a Program Logic, a tool that shows how a program/project is assumed to work by causally linking inputs and activities/outputs with intended outcomes. For guidance, refer to Supporting Document folder for Program Logic Template.]

## Project Deliverables

[What resources and/or other tangible products will the project produce/deliver? Outline project deliverables. Be specific, where possible, e.g. type of resource package, number and type of training sessions, etc.]

## Scope, Assumptions and Constraints

### Scope

[What are the boundaries/limitations for undertaking the project? Describe what is considered in and out of scope. The more specific you are, the less chance there will be for confusion or further requirements or deliverables being added down the (known as ‘scope creep’).]

### Assumptions

[What is assumed for the project to be successful? What assumptions have been made in terms of staff availability, impact on stakeholders, benefits to be delivered? Outline key assumptions.]

### Constraints

[What things must you take into consideration that could affect the project’s schedule and deliverables in terms of resources, time, quality and/or cost? Is there a component of your project that cannot start until another component is completed? List project constraints/dependencies.]

## Methods and Approach

[How will the project be carried out? Describe the key activities, methods and approach. For large/major projects, consider arranging activities into key components (e.g. by developing a Work Breakdown Structure).]

## Risk Management

[What issues/risks could delay or adversely affect the project and/or organisation? Use the table below to identify key issues/risks and risk mitigation strategies. Add/delete rows as required. Once the Project Plan is approved, transfer the Risk Management Plan into Teamwork for monitoring and control.

Risk is determined by assessing:

* Likelihood of the risk occurring (i.e. Improbable, Probable though negotiable, Probable)
* Impact of the risk occurring (i.e. Minor, Moderate, Major)
* Overall risk rating (i.e. Low, Medium, High)

For guidance, refer to the Risk Management Policy and Procedure and Risk Management Checklist (a tool to support staff in the scoping of new business, programmatic activity, or public advocacy).]

|  |  |  |  |
| --- | --- | --- | --- |
| Risk description | Potential source / cause | Risk level | Risk mitigation strategies |
| Example: |  |  |  |
| Training receives poor feedback | Training doesn’t meet participants needs/ expectations  | Likelihood: Improbable  Impact: MinorRating: Low | Pilot training and review and incorporate feedback as requiredImplement routine evaluation survey and review and incorporate feedback as requiredPromote and implement Member Feedback Policy as required |

## Stakeholder Engagement

[Who are the key stakeholders and how will they be engaged throughout the project? Use the table provided to identify the project’s key stakeholders and:

* their interest or stake in the project and whether the stakeholder directly (primary) or indirectly (secondary) benefits from project outcomes
* their needs and expectations
* how they will be involved/enabled to engage/participate in the project\*
* any issues or constraints that could limit their engagement/participation (e.g. access, confidentiality, etc.) and how this will be addressed.

Add/delete rows as required. Contact details should be recorded and maintained separately, using the Stakeholder Register Template (found in the Supporting Document folder), and in Teamwork, as appropriate.

\*Levels and types of engagement/participation include:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Inform | Educate | Consult | Involve | Co-design | Co-produce | Stakeholder-led |
| Involves providing opportunities for stakeholders to understand and be informed about something that may affect and impact them.Methods include fact sheets, posters, reports, and announcements via newsletters, social media, etc. | Involves providing opportunities for stakeholders to provide feedback, express their concerns and suggest alternative solutions. Methods include meetings, forums, workshops, focus groups, surveys, etc. | Involves partnering with stakeholders to define the problem, design and deliver the solution, and evaluate the outcome.Methods include involving stakeholders in roles such as chairing, facilitating, delivering, researching and evaluating. | Involves empowering stakeholders to lead their owndecisions, solutions and activities. |
| Doing To | Doing For | Doing With | Doing By |

For guidance on engaging consumer representatives, refer to Consumer Engagement Policy.]

### Stakeholder Analysis Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Stakeholder Group | Interest/Stake | Needs/Expectations | Engagements Strategies | Issues/Constraints/Risk mitigation |
|  | ***How much interest/stake do they have in the project?*** | ***What is important to the stakeholder?*** | ***How will the stakeholder contribute/participate?*** | ***What could limit participation and how will this be managed?*** |
| Example:NGO AOD workers | Primary stakeholder  | Enhancing clinical and therapeutic skills | Undertake workforce survey to determine needs | The survey will be anonymous and no identifying information will be shared to preserve respondent anonymity  |
| Consumer Representatives | Primary stakeholder  | Maximising service access and quality | Include consumer representative/s on project Steering Committee | The consumer representative/s will be renumerated for their time and travel to address participation barriers |
| Funding body | Primary stakeholder | Effective and efficient project delivery  | Provide quarterly progress reports | Routine data quality checks will be conducted to enable progress and final reporting |

## Communications And Reporting

[List communications and reporting requirements (both internal and external). Add/delete rows as required.]

### Communications and Reporting Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Audience | Format | Purpose/Description  | Frequency | Responsibility |
| Examples: |  |  |  |  |
| Project Manager | Issues Log | File notes recorded in Teamwork | As required | Project Team |
| Project Sponsor | Status Update | Verbal update as part of work plan meeting | Monthly | Project Manager |
| Board | Status Update | Verbal update as part of Board meeting | As required | Project Manager |
| Members | Media ReleaseMail out | Email notification of resource launchMail out of project resources | As required | Project Manager |
| Funder | Progress ReportFinal Report | Formalised report using external templateFormalised report using external template | QuarterlyAnnually | Project ManagerProject Manager |

## Governance

[What governance arrangements will be put in place to monitor/manage project delivery/outcomes? Outline governance arrangements, including the roles and responsibilities of the project team and governance body/ies (if any).

Project governance arrangements may include:

* a project manager, who leads and manages project activities and is accountable for project completion
* a project officer, who supports the project manager in managing and/or performing project activities
* a project sponsor, who authorises the projects, makes executive decisions and solves problems and conflicts beyond the program manager’s delegated authority
* a project advisory group or steering committee, which contributes to the project by providing technical guidance and expertise to the project.]

## Evaluation Plan

[What outcomes, changes or benefits are sought by undertaking the project and how will these be measured/verified? Outline monitoring and evaluation processes/activities. For guidance, refer to Supporting Document folder for respective Evaluation Plan/Report template.

If the project is a large/major project and/or is aiming to achieve practice change, consider developing a Program Logic, a tool that shows how a program/project is assumed to work by causally linking inputs and activities/outputs with intended outcomes. For guidance, refer to Supporting Document folder for Evaluation Plan/Report template.

When developing evaluation processes/activities, consider:

* how intended outcomes will be demonstrated (e.g. attitudinal scale)
* how information will be collected (e.g. surveys, interviews, focus groups)
* whether the required information is accessible (e.g. permissions/licences)
* what resources are needed (e.g. staff time, funding for a consultant).
* how evaluation findings will be used, by who, and in what format they require.]

## Project Budget

[Provide a high-level breakdown of the costs associated with the project. Remember to specify whether costs are GST inclusive or exclusive.

Once the Project Plan is approved, transfer the Project Budget into the Budget Tracker Template for monitoring and control. For template, refer to Supporting Document folder.]

|  |  |  |
| --- | --- | --- |
| Item/Service | Description | Estimated Costs (GST inclusive/exclusive) |
| Wages and on-costs  | [Example:Full-time project manager @ 38 hours/week for 3 years] | $ |
| Transport and travel expenses | [Example: Vehicle leaseFuel Flights Accommodation] | $ |
| Operating expenses | [Example: Mobile phoneVenue hireCatering] | $ |
| Resource production | [Example: Consultant feePrint and designDistribution] | $ |
| Miscellaneous | [Example: Management fee (5%)] | $ |
| Sub total | $ |
| GST | $ |
| Total | **$** |

## Project Schedule

[Arrange activities into a workable sequence using the table below (or by developing a Gantt Chart). Once approved, transfer the schedule into Teamwork for monitoring and control.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Activity | Tasks | Responsibility | Output/Deliverable | Anticipated state date | Anticipated end date |
| Examples: |  |  |  |  |  |
| Establish project governance and administration arrangements | Establish Steering Committee:- Disseminate EOI inviting stakeholder to form part of the steering committee- Develop and circulate meeting schedule- Agree on TOR and circulate to steering committee membersEngage external consultant:- Disseminate EOI / source quotes- Select preferred candidate- Establish consultant agreement | Project Manager | Steering committee established with regular meetings heldContract of Service established | 1 July 2020 | 30 June 2021 |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |
| 5. |  |  |  |  |  |
|  | *Add/delete rows as required* |  |  |  |  |

## kEY Contacts

**PROJECT MANAGER: PROJECT SPONSOR:**

**[Name] [Name]**

**[Position] [Position]**

**[Postal address] [Postal address]**

**[Phone]** **[Phone]**

**[Email]** **[Email]**

**[Web]** **[Web]**