Project Plan  
[Insert Project Title]

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# Change log

Record any changes to the **approved** information in this template in the Change Log below.

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Description of change | Section | Author |
| [00/00/22] | [Description] | [Section] | [Name Name] |
|  |  |  |  |
|  |  |  |  |

# Project reference controls

Record any project reference material information as it becomes available. Include GitHub, Mural, PowerBI, database location, Lucidchart etc

|  |  |  |
| --- | --- | --- |
| Date | Content type | Reference |
| [00/00/23] | Working files  (File location) | [URL] |
|  | Final documents (Location on records management system) | [File Reference ID] |
|  | Project board  (Location on project management software) | [Project ID / URL] |
|  | [Description] | [Reference] |

# Document Purpose

All *Italicized text* in this document is instructional and should be **replaced** before submitting to leadership for approval.

**Remove** the Document Purpose section before submitting to leadership for approval.

**Review and update** the project plan as the project progresses to ensure it’s up to date.

The Project Plan (The Plan) is scalable and designed to be used for all projects.

It identifies the stages and decision points for projects including strategic alignment, scope, costs, schedule, governance, risks and benefits.

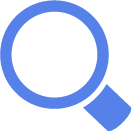
The Plan reflects the current Project Lifecycle stage and controls of the project. It should be updated at the end of each stage and used by your Project Board to monitor project progress.

## The Plan:

1. Ensures projects have adequate planning before engaging the Project Board to make any major commitment to the Project.
2. Provides information to leadership to assess progress and ongoing viability.
3. Provides a reference of what the project is about and how it’s being managed.

Complete the relevant sections as you progress through the lifecycle of the project.

Mark questions or sections that are not relevant or applicable with ‘N/A’.



1. Discovery

This section supports the **Discovery** Project Lifecycle stage.

Identify the problem to be solved and a decision on whether to create a project.

## Problem background

*Provide a summary of the problem needing to be addressed.*

*How was the problem raised? By whom? Why is it identified as a problem?*

*Has the problem been well framed and defined? Has there been work undertaken in problem framing, root cause analysis, design thinking? Were stakeholders involved?*

*Explain how the problem was investigated, which tools were used. Attach copies of relevant documents e.g., experience map, problem tree, stakeholder map etc. as appendices.*

*Has any stakeholder mapping or engagement been undertaken? What are the next steps regarding consultation? Who are the key partners to be involved?*

## Strategic Assessment

*Consider how the problem/project is aligned to strategic goals of your organisation.*

*Does the proposed project involve new ways of doing and thinking? Consider impact, scalability, and sustainability of the project.*

*Can you partner with other organisations to progress the project? Are they available and ready to collaborate?*

*Note that some considerations are difficult to apply during the problem stage.*

## Next steps

*Provide information on next steps that would occur if approval is given to progress the problem into a potential project:*

*E.g., Hold a workshop to ideate on solving the problem, consult with stakeholders etc.*

*If relevant, provide an indication of estimated resources, budget and timeframes.*

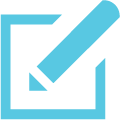
|  |  |
| --- | --- |
|  | Approval to proceed to Design |

The following problem has been explored and framed in consultation with key stakeholders and is recommended for approval to move to the Design phase of the project:

### Problem Statement

[Insert Problem Statement here]

|  |  |
| --- | --- |
| ****Recommendations****  *It is recommended that you:*  Approve this problem to proceed to the Design phase | Approved / Not Approved |
| ****Comments**** | |
| [Insert approver name and role] | |
| Date approved: DD/MM/YYYY |  |



1. Project Design

This section supports the **Design** stage of the Project Lifecycle.

Identify the outcomes to be delivered and define the project boundaries.

Check if any information has changed in the previous Discovery section since approval and update the previous section and Change Log.

|  |  |
| --- | --- |
| Sponsor and Lead | |
| Executive Sponsor: [Project sponsor name] | Project Manager: [Project Manager name] |

## Background and evidence review

*What evidence is available to support the need for change and what is the evidence to support the proposed approach.   
Provide background information/data, evidence and best practice information.*

## Project aim, objectives and outcomes

*Describe the project’s overall aim and its objectives, what it will deliver (including a high-level summary of key activities identified and potential timelines) and intended outcomes. The intended outcomes might be clinical, financial, health or equity related.*

*An objective is a clear, concise statement which, when realised, will solve a problem, fill a need or exploit an opportunity. Objectives should be SMART – i.e. Specific, Measurable, Achievable, Realistic and Time-related.*

*The Logic Model template will be useful to capture this information (it will be useful to revisit the draft Logic Model in the next stage as well). Include as an Appendix.*

*Consider how sustainability of the project will be incorporated (e.g. changes to the existing system/infrastructure and workforce capability building are more sustainable than additional staffing resources required in an ongoing manner).*

## Intended project benefits

### Intended clinical, patient and health outcome benefits

*Describe the anticipated clinical benefits from the delivery of this project, or other benefits to health outcomes or equity.*

### Financial benefits

*Indicate if you anticipate realising financial benefits from the delivery of this project. If yes, please describe where possible.*

## Scope

*Scope should clarify the boundaries of the work, what areas of work will be included (in-scope) and what is outside the scope (out-of-scope).*

|  |  |
| --- | --- |
| ****In scope**** | ****Out of scope**** |
|  |  |
|  |  |
|  |  |
|  |  |

## Equity

*Take time to explicitly consider how the planned aims, objectives and outcomes will have an impact on equity for the target population. To what extent will the project address underlying conditions of inequity to improve health outcomes?*

*Health inequities are differences in health status between population groups that are socially produced, systematic in their unequal distribution across the population, avoidable and unfair. Consider how communities affected by inequity will be engaged to gain insight into the specific issues and barriers they face. Identify key representatives of affected populations and consider how they will be involved in the project (e.g. if Aboriginal people may be at a disadvantage in relation to the project, engage key local Elders and community representatives for cultural guidance in design of the project).*

*Defining equity from a project-specific perspective will enable the project design to demonstrate how project activities aim to improve equity, and how they might be sustained or built upon.*

*Further guidance for consideration of equity in projects is available here:* [*https://www.nhmrc.gov.au/guidelinesforguidelines/plan/equity*](https://www.nhmrc.gov.au/guidelinesforguidelines/plan/equity)

## Stakeholders

*Provide a summary of the key stakeholder groups affected by the project (internal and external) and strategies for engagement. Consider the purpose and objectives of engagement, key messages to share and parameters and limitations of engagement. Describe which stakeholders, including consumers and vulnerable populations, have already been involved in the project design and how. Describe how engagement activities will be inclusive for all stakeholders. Note. A more detailed Stakeholder planning will be conducted during the next stage of* ***Planning.***

*For larger projects, develop a Stakeholder Engagement Plan and attach as an appendix to this plan.*

Download the **Stakeholder Engagement** **Plan** template from the CEIH website.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ****Stakeholder**** | ****Role**** | ****Interest**** | ****Power/influence**** | ****IAP2 Participation**** |
| *Person/entity* | *Their role in the project* | *Low/high* | *Low/high* | *Inform, Consult, Involve, Collaborate, Empower* |
|  |  |  |  |  |

## Resources

*Estimate staff, business units (i.e. workforce, finance, funding models, IT etc.) and funding required to deliver this project.*

*A more detailed analysis of resource and requirements will be conducted in the next* ***Planning*** *stage.*

*If the project requires additional funding/FTE outside of existing resources, confirm with your Executive Sponsor / Manager whether a Business Case is needed.*

|  |  |  |
| --- | --- | --- |
| ****Resource area**** | **Project stage** | ****Resource requirement**** |
| Staff | *e.g. Design, Planning, Delivery* |  |
| Budget |  |  |
| Technology |  |  |
| Equipment |  |  |
| Services |  |  |
|  |  |  |

## Major risks

*Are there any major risks? Risk identification and mitigation will be detailed in the next Planning stage. This section only requires identifying major risks.*

## High level Project Milestones

*Identify the high-level Milestones anticipated for all Project Lifecycle stages including dates, if known.*

|  |  |  |  |
| --- | --- | --- | --- |
| ****Milestone/Action**** | ****Description/Notes**** | ****Responsible**** | ****Timeframe**** |
| *e.g Convene a working group/sub-committee of key stakeholders* | *Including identifying, inviting, developing terms of reference* | *CJ, GK & ST* | *End of April 22* |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |

|  |  |
| --- | --- |
|  | Approval to proceed to Planning |

The following problem has been explored and framed in consultation with key stakeholders and is recommended for approval to move to the Planning phase of the project:

### Problem Statement

[Insert Problem Statement here]

|  |  |
| --- | --- |
| ****Recommendations****  *It is recommended that you:*  Approve this problem to proceed to the Planning phase | Approved / Not Approved |
| **Comments** | |
| [Insert approver name and role] | |
| Date approved: DD/MM/YYYY | |



1. Project Planning

This section supports the **Planning** stage of the Project Lifecycle.

Identify the detailed timing of activities, costs & resources, risks and stakeholder engagement requirements.

Check if any information has changed in the previous Design section since approval and update the previous section and Change Log.

Determine if you need a **Business Case** to support your project. If so, **stop** completing this section and complete the Business Case template. Consult with your Executive Sponsor / Manager to determine if a Business Case is needed.

## Dependencies

*Dependencies are events or work this project depends on for success. Describe any known dependencies with other projects, programs, or initiatives (which may be internal or external).*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Dependency | | Relationship and impact | | Status | |
|  |  | |  | |
|  |  | |  | |
|  |  | |  | |
|  |  | |  | |

## Assumptions

*Assumptions are factors you are assuming to be in place or will occur during the life of the project that will contribute to a successful outcome. What assumptions have you made during your planning process?*

|  |  |  |  |
| --- | --- | --- | --- |
| Assumption | Description | Impact | |
|  | *e.g. The Project Manager and external contractors remain available throughout the project* | *e.g. Changes in resource availability will impact timeframes of project.* |
|  | *All capital funds will be spent within financial year* | *Implications for future bids if capital is not spent on what was intended.* |
|  |  |  |
|  |  |  |

## Governance

*Identify the membership and adjust any responsibilities in the table below. Include a summary of any formal partnerships that will be required including agreement types (e.g. MOAA), procurement or contracting activities.*

### E.g Name of Overseeing Group/Project Board

*e.g. The Project Board is responsible for the overall direction and management of the project, approving the scope, objectives and potentially release of funding.*

*Identify the Group’s membership and responsibilities.*

|  |  |  |
| --- | --- | --- |
| Role | Name/title | Responsibilities |
| *Chair* |  | * *Chairs meetings and conduct briefings* * *Outlines strategic direction and management of the project and its overall success by providing leadership, guidance and commitment to the project* * *Stays engaged with the stakeholders* * *Provides an overarching view on project* |
| *Group members* |  | * *To provide clinical and consumer expertise and experience.* * *Actively engage, participate and contribute to decision making in the planning, design implementation and evaluation of the project.* * *Represent the interests of the organisations, stakeholders and/or groups of the project, and be a mechanism for early engagement, communication and feedback regarding work of the project by raising or discussing pertinent issues within relevant groups and to feed back into the Working Group results of these discussion to inform and guide the project.* |
|  |
|  |
|  |
| *Consumer representatives* |  |

## Project Team

*The Project Team is collectively responsible for assisting the Project Manager to deliver the project objectives.*

*Identify the Project team’s membership and responsibilities.*

|  |  |  |
| --- | --- | --- |
| Role | Name/title | Responsibilities |
| Project Sponsor |  | * *Ensures project governance is in place and that roles are allocated* * *Maintains project performance and provides support to the project team* * *Monitors project progress and the business justification and assurance for undertaking the project* * *Maintains project performance and provides support for the project board and team* * *Supports project stakeholders and Project Manager around the change and manage resistance.* * *Stays engaged with the stakeholders and keeps track of project funds and make decision on financing.* * *Approves all change requests and project variations outside of the defined project tolerance.* |
| Project Director |  | * *Reporting to the Executive Governance group to make recommendations for approval or decisions* * *Making policy and resourcing decisions, reviewing and approving project documents and changes to scope, project reviews and project closures* * *Monitoring of project progress - risks, issues, dependencies, and tasks. Resolving issues and tracking the impact of task progress on milestones* * *Reporting to the Executive Governance group to make recommendations for approval or decisions* * *Ensuring effort and expenditure are appropriate to stakeholder expectation and Business Case or project justification aligns with CEIH objectives* |
| Project Manager |  | * *Runs the project on behalf of, and within the constraints of the Project Board* * *Manages tasks and activities* * *Manages the Project Team and ensures essential roles are agreed to at the start of the project* * *Delegates project work to team members* * *Develops, monitors and updates the Project Plan.* * *Acts as the point of contact for all communications to and from the Project Board.* * *Ensures the project is implemented on agreed time, budget and scope.* |
| Project Support |  | * *Provides support on tasks and activities* * *Liaises with and updates xxx on project activities* |
| Project Officer |  | * *Provides support on tasks and activities* * *Assists in supporting the Working Group and Working Group meetings* |
| Other Support |  | * *Data and database/management support* * *Communications – marketing and media planning* * *Innovation – facilitation/ support of ideation and collaboration, foster innovation* |

## Project Partners

*Who (if any) are the key individuals and/or agencies that have a mutual benefit and the capacity to be involved in this project? Include those formal project partners and their roles and responsibilities, including whether any formal partnership mechanisms (e.g. Memorandum of Understanding, funded contract etc) support their involvement.*

## Costs and resourcing

*This section builds on work completed in Project Design.*

*Identify estimated project costs, the funding source, other required resources (including evaluation support such as design, analysis, reporting), and how resources will be managed in the project. Other resources include staff or business units (i.e. workforce, finance, funding models, IT, procurement, evaluation etc.) required to deliver this project.*

**Funding source:** *Identify where funding for the project will come from [e.g. business unit, SA Government Responsibility Index, or external funding]*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Expense | Project Stage | Resource | Project Costs ($ split into financial year) | Ongoing Costs ($) | Total Cost ($) |
| Salaries and wages *Use salaries calculator on Sharepoint to estimate cost* | *Planning Delivery* | * *Internal salaries (e.g. project management and support)* * *External wages, contractors or consultants (identify recruitment agency)* |  |  |  |
| Communications | *Planning Delivery* | * *Promotions* * *Marketing* * *Events (e.g workshops)* |  |  |  |
| Project-specific sub committee | *Delivery* | * *Consumer representation* |  |  |  |
| Other costs |  | * *Data system development, integration and analysis* * *Computers, software* |  |  |  |
| TOTAL COST |  |  |  |  |  |

## Stakeholders and communication

*This section builds from the previous Stakeholder section in the Design stage. Revisit initial Stakeholder Mapping to ensure it is up to date, if this was not completed ensure it is now done so and added as an Appendix to this plan. For larger projects, develop a Stakeholder Engagement Plan (available on the CEIH website). Attach the template as an appendix to this plan.*

Download the **Stakeholder Engagement** **Plan** template from the CEIH website.

## Communication plan

*This section builds on plans for communications identified in the* ***Design*** *stage. Project communication is enabled and facilitated through both formal and informal means. In both cases, there are responsibilities and protocols to be observed.*

*For smaller projects, use the table below to provide a summary of communications activities. For larger projects, develop a Communications Plan and attach as an appendix.*

Download the **Communications** **Plan** template from the CEIH website.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Who (Target audience) | Why (Purpose) | What (Item) | When (Frequency) | How (Channel) | By (Owner) |
| *Project Team* | *Status reports, risk & issues change, meetings* | *Meetings* | *Bi-weekly* | *In-person & online* | *Project Manager* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Schedule and milestones

*Using the milestones developed in Stage 2: Project Design, review and update the project schedule including timelines and milestone deliverables. Ensure any changes and variations are noted.*

## Monitoring and reporting

*Describe the approach to project tracking and status reporting, including project controls/tolerance and escalation procedures (e.g. to project governance).*

*If additional monitoring and reporting will occur, describe it here.*

## Change management

*Organisational Change Management (OCM) addresses the ‘people focused’ aspects of a project; that is, those activities which need to be undertaken to ensure the buy-in, engagement and participation of various individuals and groups impacted by the project.*

*These impacts arise from changes in roles and responsibilities, the introduction or modification of processes, policies and procedures, and changes to how technology is used to deliver business outcomes.*

*Describe how your project will address OCM in terms of:*

* *People – roles and responsibilities.*
* *Processes (incl. policies and procedures)*
* *Technology – documentation of changes to impacted systems, including operational responsibilities and end-user impacts.*
* *Stakeholders – mechanisms and communication*

## Risk and issue management

*Describe how change to the planned timelines, scope, or cost of the project will be managed. Complete the table titled ‘Risk Matrix’, see Appendix 1.*

*A change request template is available for changes that go beyond tolerance levels.*

*e.g A change request template will be completed for changes to planned timelines, scope, or cost of the project that go beyond tolerance levels.*

To determine the Absolute Risk Level see the [SA Health Risk Matrix](https://inside.sahealth.sa.gov.au/wps/wcm/connect/17c20f00463e89e3a54ab57f932e4f92/Project+Risk+Assessment+Matrix+2014.pdf?MOD=AJPERES&CACHEID=ROOTWORKSPACE-17c20f00463e89e3a54ab57f932e4f92-nJIp1jH).

## Project evaluation

*The below provides a guide to consider and plan how you will monitor and evaluate your program/project/intervention, as well as how you intend to use evaluation results for program improvement and decision making.*

*Consider how will the project be evaluated against the articulated scope? What does project success look like? Ensure that your evaluation aligns with developed logic model.*

*If the project requires more detailed evaluation (consult with a manager), complete the Evaluation Template.*

### Purpose of the evaluation

*These are the high-level questions you want to answer – consider what you would want to tell a Minister in an ‘elevator pitch’. These are often like research questions.*

*The evaluation questions should align to the program logic, and will seek to determine whether the short, medium and long-term outcomes were achieved.*

*Ensure the target audience of the evaluation questions is clear (e.g. clinicians of a local health network, patients of a particular service, rural mental health consumers, a health service).*

*Consider if there are questions to evaluate equity and partnerships (Partnership team will provide evaluation support for evaluation of Partnerships).*

### Key evaluation questions

*This section will be guided by the evaluation question(s) – what methods will provide the most robust evidence to your audience, but are feasible within your resourcing and timeline constraints, to answer each question?*

*Ensure that the timeframe for data collection aligns to the timeframe required for the outcome of the evaluation to occur (e.g. a change in service delivery can be expected soon after a project is complete, however longer-term changes in patients’ health behaviour will take longer).*

*Plan how you will ensure the evaluation methods reach a representative sample of the target group (e.g. how will priority populations be included in the evaluation?), will collect baseline and follow-up data and measure project success. Consider any contingency plans required for project evaluation if the project changes in scope.*Target Population

Data Collection

## Timeline and Deliverables

*Completion of a table will be useful for this section:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Evaluation Question | Indicator | Data source | Target Population | Timeframe | Analysis |
| *Question 1* | | | | | |
| *Clinician Knowledge and Confidence* | *‘I have sufficient knowledge’* | *Baseline Questionnaire* | *Clinicians* | *Baseline (September 2022) and July 2023* | *Descriptive overview of knowledge and improvements* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| *Question 2* | | | | | |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| *Question 3* | | | | | |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Transition to business as usual (BAU) plan

*Outline the approach that will be required to transition the project from delivery to closure and to business as usual. Consider also if there are any monitoring activities to continue and who will be responsible for these.*

|  |  |
| --- | --- |
|  | Approval to proceed to Delivery |

Project Planning has been detailed in consultation with key stakeholders and is recommended for approval to move to the Delivery phase of the project:

|  |  |
| --- | --- |
| ****Recommendations****  *It is recommended that you:*  Approve this problem to proceed to the Delivery phase | Approved / Not Approved |
| ****Comments**** | |
| [Insert approver name and role] | |
| Date approved: DD/MM/YYYY |  |

# Template Revisions

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Description | Person |
| R0.1 | DD/MM/YYYY | Draft Project Plan |  |
|  |  |  |  |
|  |  |  |  |

# Appendix 1: Risk Matrix

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Risk ID | Project Stage | Risk Owner | Absolute Risk level SA Health Risk Assessment Matrix | | | Potential Impact | Risk Control |
| Likelihood | Consequence | Rating |
|  | Description | * Project Planning * Project Delivery | * Project Manager * Project Sponsor * Project Board | * Rare * Unlikely * Possible * Likely * Almost Certain | * Insignificant * Minor * Medium * Major * Critical | * Low * Moderate * High * Extreme | * Clinical * Financial * Our People * Legal, Policy and Regulatory * Organisation/ * Consumer * Corporate Reputation and Image | Controls in Place – controls are used to minimise the risk in terms of Likelihood of the risk occurring and reduce the consequences if the risk was to occur. |
| R01 | *Lack of buy in and support from health care sector* | *Planning, Delivery* | *Working Group* | *Possible* | *Medium* | *Moderate* | *Implementation* | *Mapping for representation across LHNs in working group.* |
| R02 |  |  |  |  |  |  |  |  |