

Carmarthenshire County Council

Project Business Plan

This Project Business Plan Template is intended to be used as a guide to illustrate what you will need to consider and document in the Development Stage of your project. The level of detail of the information you present should be proportionate to the type of project you are developing. The template should be read in conjunction with the Project Management Toolkit, Stage 2 – Developing Your Project, where you will find templates and further guidance to support you through the process of compiling the Project Business Plan.

The document that you produce should be clear and succinct whilst providing sufficient information about the project to ensure it is viable, doable and worthwhile.

The document will be the main reference for the project and will be used by the Project Board and Key Decision Maker(s) for the type of project (See Decision Matrix) to decide whether it will be approved to move into Stage 3 – Project Delivery.

Contents:

PART 1 –Project Justification

Section 1a - Project Aim, Objectives and General Description

Section 1b - Project Outcomes, Benefits and Critical Success Factors

PART 2 – The Practicalities

Section 2a - Project Approach

Section 2b – Quality

Section 2c - Costs and Funding Requirements

Section 2d - Procurement:

Section 2e - Resources

Section 2f - Key Milestones

Section 2g - High Level Project Delivery Plan

PART 3 – Project Influences

Section 3a - Identify Interdependencies

Section 3b - Stakeholders and Communication

PART 4 – Management of Delivery

Section 4a - Risk Identification and Management

Section 4b - Governance and Management

Section 4c - Exit Strategy

PART 1 –Project Justification

Section 1a - Project Aim, Objectives and General Description

What are we setting out to achieve and why? This section needs to provide the reader with background information for them to begin to understand your project

In this section you need to:

- Provide a short overview of the project
- Outline the project aims and objectives (if you have provided these in a PPF they can be copied to the Business Plan, provided they haven't changed)
- Summarise why the project is needed, what is the rationale?
- Summarise any history behind the project that will be relevant to justify the business case and may need to be considered going forwards
- Confirm the boundaries/ scope of the project (what is included and what isn't)

Section 1b - Project Outcomes, Benefits and Critical Success Factors

What difference/ impact is the project going to make and what must the project achieve and/or deliver for it to be a success? The information in this section needs to provide the reader with a simple but realistic understanding of what the project is going to achieve and how that will be measured

In this section you need to:

- Provide detail on the desired outcomes/ benefits of the project. These need to be tangible and measurable improvements that can be attributed to the deliverables or outputs that are produced by the project. You will need to assess and document the current position to provide a baseline against which future benefits can be measured.
- Provide detail on the aspects of the project that must be delivered for it to achieve its objectives and be considered a success (Critical Success Factors).
- Provide detail of any dis-benefits that may arise from the project (i.e. impacts that are perceived to be negative)
- Describe how the outcomes and benefits will be measured and who will measure them. Benefits may be realised after the project has been delivered, ensure that there is a nominated person who will take responsibility for realising and capturing the benefits of a project.

PART 2 – The Practicalities

Section 2a - Project Approach

How are you going to do the doing? This section needs to provide the reader with a succinct overview of how the project objectives will be met

In this section you need to:

- Describe how the project will be delivered
- Refer to the options appraisal carried out as part of the PPF or Business Case process to illustrate how you have decided on the approach you are proposing.

Section 2b – Quality

What are the quality criteria that need to be met to ensure the project delivery is successful and objectives are met?

- It may be useful to define quality expectations in this section (for example time, cost, specifications that must be met). This is particularly relevant if project delivery is complex and many parties are involved.

Section 2c - Costs and Funding Requirements

How much will the project cost and where is the money going to come from? The information in this section needs to provide the reader with a detailed and clear set of anticipated project costs from which they will be able to assess value for money.

In this section you need to:

- Build on the cost estimates provided in the Business Case or PPF to provide a detailed breakdown of anticipated costs. It is vital that project costing is properly undertaken to ensure the project is affordable and value for money. This exercise may also help you to identify key cost related risks (e.g. areas of potential cost escalation).
- Provide information about funding for the project. Explain where the required funds are going to come from, any implications of using that funding and what needs to be done to secure the funding. If funding is being sought from sources outside the Authority you will need to consider the constraints that accompany the funding (for example: grant conditions, compliance requirements, expenditure profiles) and the impact this will have on the project and other resources in the Authority (see Resources below).

Section 2d - Procurement:

What is the procurement plan for the project? Most projects involve a level of procurement; this section needs to outline the procurement needs and timetable for the project.

In this section you need to:

- Provide information about the procurement activities that will be required for the project, including the time implications of this (as this can have a significant bearing on project delivery)
- Confirm whether you have engaged with the procurement team and whether there is resource available to support your procurement requirements.

Section 2e - Resources

Other than money, what resources will be required to deliver the project? This section needs to provide the reader with an understanding of the resource implications of the project.

In this section you need to:

- Provide information about the administrative and specialist resource requirements that the project will place on the organisation. You will need to engage with any department or individual who will be expected to contribute to the project, to discuss the project and agree an appropriate level of support or resource that will be required. Examples of departments whose resources are usually required in projects but are often overlooked include; procurement, legal services, design services, planning, technical services...

Section 2f - Key Milestones

What will be the significant milestones in the delivery of the project?

In this section you need to:

- Provide the detail of the key milestones that the project is expected to reach. These key milestones can be used as review and control points in the project.

Section 2g - High Level Project Delivery Plan

Provide an outline of the activities that will get the project delivered

In this section you will need to:

- Develop and document a High Level Delivery Plan that includes details of the work required to complete the project, estimated timescales (start and end dates), key milestones and any other relevant planning information. You should also include information about any assumptions that have been made in the planning process.

PART 3 – Project Influences

Section 3a - Identify Interdependencies

Do any other activities have a direct impact on the project? Provide the reader with a summary of these interdependencies.

In this section you will need to:

- Identify, consider and document any interdependencies between your project and any others. This might include one project depending on the outcome of another, or your project influencing the activity of another. It is important to identify and address these interdependencies at this stage in the process as it may affect the planned project delivery.

Section 3b - Stakeholders and Communication

How will the right people be involved in and informed about the project?

In this section you will need to:

- Provide a copy of your Stakeholder Engagement Plan. (See Project Management Toolkit, Stage 2 - Developing your Project for a template).
- Provide a copy of your Communication Plan. (See Project Management Toolkit, Stage 2 - Developing your Project for a template).

PART 4 – Management of Delivery

Section 4a - Risk Identification and Management

What could go wrong and how will you manage it? Provide the reader with a summary of the project risks and how they will be managed.

In this Section you need to:

- Provide a copy of the Project Risk Register. (See Project Management Toolkit, Stage 2 - Developing your Project for a template)
- Provide a summary of how these risks will be monitored and managed and who will assume this responsibility.

Note: The Authority has introduced a risk management tool for project managers, if you haven't used the system before you will need to contact colleagues in Risk to register to use the system.

Section 4b - Governance and Management

How will the project be controlled and by whom? Provide the reader with an overview of the project's management arrangements.

In this section you need to:

- Provide a summary of the agreed decision making parameters for the project manager.
- Detail the key control points for the Project Board to meet and approve progress to the next phase,
- Decide and describe what information will be required by the Project Board for them to carry out their role effectively and in what format
- Provide information on your planned reporting mechanisms
- Decide and document the role of stakeholders in the management of the project (e.g. funding bodies, interdependent projects, other departments...)

Note: There is no standard governance structure in the Authority because all projects are different, you need to balance the requirement to appropriately control, manage and guide the project with the need to deliver the project outcomes. The management and governance should be proportionate to the requirements and complexity of the project. External funding organisations may insist on a particular governance structure.

Section 4c - Exit Strategy

What happens at the end of the project?

In this section you need to:

- Provide a summary of what will happen at the end of the project, for example, how to transition the project outputs to operational business or transfer them to the end user