Duke University
Medical Center Library and Archives

Project Planning Template

Project Title____

Initial Date of Assignment/Charge to Work Group:________________

Last Major Revision to this Plan :________________________________

Part 1: General Scope of Project

Usually Library Administration or another administrative unit or committee (referred to as Administration throughout this document) will determine the need for a project planning group and develop the charge and determine appropriate membership for the Work Group. *Administration will initially complete part 1 to provide the Work Group with necessary direction to start the planning process.* The Work Group will revise Part 1 as the process is refined and changes are made in conjunction with Administration.

Administrative Group initiating the project/charge:___________________________

1. Project Goal /Charge to Work Group -- Describe the project's overall goal in terms of intervention, planned service, or action.

Further clarification of scope or charge by working group:

2. Specific Deliverable(s)/Outcome(s)

3. Background information

Context: What triggered this project?

Who are the stakeholders?

Internal

External

What is the relevant political context for this project?

What ***internal* documentation** is available to inform the planning process? If this documentation is available through the department's intranet, specify file name and location. How will the information be evaluated in terms of validity and applicability? Use the “Evaluation of Data” checklist in the appendix to determine how applicable or useful it is to the process.

Internal Document / data/ Information	**Location/Source – Person, Intranet, etc.**	**How applicable/ Useful -- How applicable/ useful – 1 not useful – 5 highly relevant/useful**	**Used in project Y/N ***

* Keep copies of documentation on file and attach as part of final report/recommendations given to Administration.

What ***external* documentation** is available to inform the planning process? Include here references to best practices or other evaluative resources. How will the information be evaluated in terms of validity and applicability? Use the “Evaluation of Data” checklist in the appendix to determine how applicable or useful it is to the process.

External Document / data/ Information / Literature searches	**Location/Source – Person, Web sites, databases, etc.**	**How applicable/ useful – 1 not useful – 5 highly relevant/useful**	**Used in project? Y/N***

* Keep copies of documentation on file and attach as part of final report/recommendations given to Administration.

4. What additional questions need to be addressed in planning for this project?

5. Role of planning/Work Group [initially completed by Administration

☐ Identify issues

☐ Create initial proposal for feedback from:_________________________

☐ Prepare budget

☐ Make recommendations

☐ Implement plan

☐ Other – specify:

6. Time constraints/deadlines

Initial deadline set by administration:

Revised deadline(s) approved by administration:

Reasons for delay or change in deadlines:

7. Budget information

Initial funding available for project :

Revised funding approved by administration:

Reasons for revised budget:

8. Reporting expectations – initially set by Administration for major updates and reports

☐ Library Council – Quarterly

☐ Administration ☐ quarterly ☐ monthly ☐ other:__________

☐ Management team – specify frequency or date

☐ Library/Archives units – specify unit(s) and frequency or dates:

☐ External groups – specify group and frequency or dates

PART 2: Planning

1. Members of work group – list members and group(s) they represent:

<u>Who is missing?</u>

<u>Who needs to be involved at certain points or later in the project? Systems, Perkins, other units/departments?</u>

2. Roles of work group: [recorder, facilitator, minute taker, etc.]

3. What are the various components that need to be considered, what resources will be used to answer the question and who is responsible for gathering information?

Component	Specific question and source of information	Person Responsible	Completed Y/N
Materials, equipment			
Budget			
Staffing, both internal and external			
Training			
Policy and legal considerations			
Procedures (existing or new)			
Publicity/marketing			

4. Will the project involve computers, software, and other technology or impact the network?

☐ No

☐ Yes – Describe and identify who you will work with IT Services.

5. External groups that need to be involved in discussions and when they need to be contacted?

6. Timeline for project

List critical milestones and deadlines. Discuss what must be done first before another step can be taken or decision made. Put in chronological order from beginning of project to its completion.

Action/decision/major milestone	Date / deadline	Step that must happen before this can be completed, if applicable
Start of project		

7. Communication plan – This section deals with more procedural and informal communications – see Part 1, Section 8, for formal reporting requirements.

Communication within the group – by email, paper report, Intranet; special routing list or existing one? Frequency, format and archiving.

Planning group minutes – responsibilities, archiving, access – restricted or available to everyone, how to notify when posted

Announcements to external stakeholders such as patrons, other departments
Frequency, Format, Archiving

Who needs to be updated about the project:

Within MCLA:
Frequency, format:

Outside MCLA:
Frequency or timing, format:

Part 3: Implementation Plan

1. Monitoring methods

2. Activities – specify the various steps of the implementation, and who is responsible.

3. Expenditures – what must be ordered by whom and by when?

4. Timelines and scheduling

Action /major milestone	**Date / deadline**	**Step that must happen before this can be completed, if applicable**
Start of project		

5. Quality assurance procedures – what quality measures are needed? [e.g., patron receives x 98% of the time] **What are the methods for measuring the success of the implementation?**

6. Communication and feedback – types of communication, frequency, and responsible party.

7. Training – content, schedule and list of trainers

8. Troubleshooting – how problems will be handled, contact person(s), etc.

Part 4. Evaluation

1. **What are the measures for success? What will a successful implementation look like?**

2. **Outcome evaluation --Mid-term and long-term. Methods for evaluating outcome? Schedule for evaluation and people responsible.**

3. **Stakeholder feedback – methods to be used? When?**

4. **Benchmarking activities**

5. **Final documentation**

   Barriers

   Lessons learned

6. **Dissemination of results – poster, paper, presentation?**

Appendix

Evaluation of data - checklist

Please consider the following questions:

1. How comparable is the setting to your own?

2. How reliable is the source of this data?

3. If the data was collected in response to a survey:
    - What was the response rate, and how representative was it of the overall population being studied?
    - Are the results complete and have they been analyzed in an easily interpretable way?
    - What attempts have been made to ensure reliability of responses?

4. Can the results be applied to the local population or setting?

5. What are the implications of the data for this project
    - In terms of current services?
    - In terms of cost?
    - In terms of the expectations or attitudes of stakeholders?