

1 Creating a project plan

A well-structured project plan provides a roadmap for success, helping churches and community groups align their vision, resources, and activities. This section outlines key steps for developing a clear vision, creating an actionable plan, and managing a realistic budget.

ESTABLISHING A VISION

Whatever your project is, the people who run, manage, and fund it need clarity on what you are trying to achieve. This section provides simple tools to help you develop, refine, and evaluate your project's vision. A well-defined vision that is embraced by key stakeholders is usually the foundation for creating effective written plans, securing funding, managing resources, and delivering results.

What is a vision?

A vision is the **ultimate goal** of your project, describing the impact you want to create for individuals or the community. A strong vision:

- **Motivates** and energises people.
- **Provides direction** for planning and implementation.
- **Builds commitment** among all involved.

Developing an inclusive vision

An inclusive approach ensures that all key stakeholders contribute to a shared vision, regardless of their backgrounds, abilities, or perspectives. It acknowledges that diverse viewpoints and experiences enrich the process and lead to more sustainable and community-driven solutions.

Identifying and involving stakeholders

Stakeholders are individuals or groups with an interest in your project. Identifying and involving them from the start will lead to more successful and sustainable outcomes.

Stakeholder categories

- **Primary stakeholders:** Those directly affected by the project and with a significant interest in its outcome. Example: If you're running a weekly hot lunch your primary stakeholders include attendees and volunteers.
- **Secondary stakeholders:** Those indirectly affected by the project but still with an interest in its outcome. Example: Individuals or organisations donating food, partner organisations, or government agencies supporting your work.

Tips for involving stakeholders in the development of your vision

- **Encourage participation:** Involve beneficiaries, volunteers, staff, management, commissioners and funders in shaping the vision.
- **Foster consensus:** Create an open, respectful space where all contributions are heard and valued.
- **Use visuals:** Not everyone communicates best with words, so consider using drawings, pictures or mind maps.
- **Ensure accessibility:** Consider whether stakeholders have accessibility or language needs. Ask them what they need to be able to participate fully, such as translations, interpreters or alternative formats.

1 Creating a project plan

- **Avoid Jargon:** Keep language simple and free from jargon and acronyms so everyone understands and feels included.
- **Seek assistance:** If reaching an agreement is difficult, consider bringing in someone outside your group or project to help.
- **Share the vision widely:** Display it on your website, social media, and within your community to build ownership and momentum.

The 7 W's Vision Development Tool

This simple seven-question tool provides a framework for developing your vision. The answers you generate may become the basis of a written action plan.

Church groups may wish to enhance this process with prayer. A great starting point could be a prayer walk around your local area. See our guide [\[Prayer_Walk_Activity_A4.pdf\] cuf.org.uk/uploads/img/Prayer_Walk_Activity_A4.pdf](https://www.cuf.org.uk/uploads/img/Prayer_Walk_Activity_A4.pdf)

The 7 W's represent the basic questions that every funder and decision-maker will ask about your project. You can answer the questions individually and then share your responses with others or they can be answered as part of a group exercise. Asking someone you trust, who is not part of your project, to act as a facilitator may help you to get more out of the vision development process. If you find it difficult to answer a question, don't worry; you're simply identifying an area that may require further exploration!



Planning on bringing a group together to develop your vision and plan? **See our tips for group facilitators in the Appendix.**

The 7W's

W1. Who will benefit from the project and **who** will be working with you? e.g. volunteers, church leadership, paid staff, congregation, partner agencies? **Who** you might need to attract in the future?

W2. What are your aims? (list your key goals.)

W3. Why is the project necessary? (What issues does it address?) Include any reports, statistics, local community views, press cuttings etc.

W4. Where will it take place? (Church, community space, outreach location.) Add information about the locality, including type of housing, access to services and opportunities, green spaces and play facilities. Avoid negative stereotypes, as communities are often unfairly labelled. Instead, focus on the positive aspects as well as the challenges faced by the community.

W5. When do you want to carry out your project, including timescales, hours; and contingency plans if you don't meet expected timescales?

W6. With what resources will your project be carried out? Consider how much money will you need and where might it come from, as well as the people, equipment, buildings and transport necessary.

W7. Work out how your project will be implemented. For example: How many people will you help? How will you support volunteers? Have you set any targets? How will you monitor success? Additionally, use this section to include any other work or solutions you have considered that will be needed for your project.

1 Creating a project plan

CUF's Parish Look Up Tool

cuf.org.uk/lookup-tool

provides demographic information about key social challenges such as poverty, housing and education.

The Growing Good Toolkit

growing-good.org.uk

will help your church think about the gifts, needs and opportunities in your congregation and wider community, and help you grow in confidence and connection.

A Community Survey

involves listening to local people to identify local issues and priorities.

cuf.org.uk/resources/community-survey

Next Steps

This exercise may provide all the information you need to start your **project plan**, or it might highlight areas that need further development. You might realise you need to do **more research**, talk to local people and organisations or gather more data.

If your group has come up with many ideas, here are some suggestions on how you can filter them to determine what to focus on:

- **Assess resource requirement:** Consider the resources needed to implement each idea. Resources can include money, time, expertise, planning, and volunteers. Organise your ideas based on their resource dependency: low, medium, or high. You may be able to quickly address several low-resource ideas, but you might choose to focus on just one high-resource idea over a longer period.

- **Identify top ideas:** Ask your group to collaboratively select the top three ideas they wish to develop. Allow time for discussion and possibly use a voting system to reach a consensus. Ideas that do not make the shortlist can always be revisited later.
- **Use Compass Points for Discussion:** Utilise the points on a compass to guide your focus on where to allocate energy and resources:
 - North – What has gone cold? Does it need refreshing?
 - East – What's on the horizon? How can you explore new opportunities?
 - West – What's leaving? Is there anything you need to let go of?
 - South – What's warming up? How can you nurture growth?

CREATING A PROJECT PLAN

A project plan is a critical document where you will outline your goals and objectives, set targets, define activities, identify risks, and detail how those risks will be managed. You will also include your budget and strategy for tracking progress. A well-structured project plan serves many purposes:

- **Guides implementation:** Keeps the project focused and on track.
- **Supports funding applications:** Helps secure grants and donations.
- **Ensures accountability:** Provides measurable goals and review points.

While the level of detail may vary depending on the project's size, all project plans should include:

- **Project goals:** The overarching aim of the initiative.

1 Creating a project plan

- **Objectives:** Specific, measurable steps to achieve your goal.
- **Timeline:** A breakdown of activities and deadlines.
- **Budget:** Financial planning for sustainability.
- **Risk management plan:** Identifying challenges and solutions.
- **Resource plan:** Allocating people, space, and materials.



Our **project planning tool** can help structure and refine your plan, making it easier to implement and communicate effectively.

cuf.org.uk/uploads/resources/Planning-Tool.pdf

DEVELOPING A PROJECT BUDGET

A budget is an essential part of your project plan, ensuring financial sustainability and accountability. A well-prepared budget helps:

- **Make informed decisions:** Helps you make decisions based on reality, not guesswork.
- **Control finances:** Avoids overspending and ensures funds are used effectively.
- **Support funding applications:** Demonstrates financial responsibility to grant-makers.

Steps to develop a strong budget:

1. **Start early:** Planning a budget can take time, so begin as soon as possible.
2. **Estimate costs:** Identify all potential expenses such as staffing, equipment, venue rental and promotional materials. If you don't have

accurate figures, make reasonable assumptions to create an outline budget. This will help pinpoint gaps that need further research.

3. **Identify income sources:** Consider grants, community fundraising, and other revenue streams.
4. **Outline financial shortfalls:** If expected income does not meet projected costs, adjust the budget or explore additional fundraising options.
5. **Seek expert review:** Have a third party review the budget for accuracy and feasibility.
6. **Keep it updated:** Regularly revise the budget to reflect actual income and expenses.

Budget structure:

A clear budget typically consists of two main categories:

- **Income** – Grants, donations, membership fees, fundraising events, sponsorships.
- **Expenditure** – Staff salaries, rent, utilities, marketing, materials, transportation, insurance.

If there is a shortfall between your income and expenditure, consider:

- **Adjusting project activities** to align with available funding.
- **Expanding fundraising efforts** to bridge the shortfall. Demonstrating to funders that additional income sources are being pursued.

Tip: Before submitting your budget, check with funders or decision-makers about their specific requirements. Some may ask for a **summary budget**, where similar costs are grouped under broad headings (e.g., "Total Staff Costs" may include wages, pension contributions, insurance, and training). Others may require a more detailed breakdown.