

How to prepare a project plan for your CAPS project

Date (Month / Year)

Instructions

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| **Project Name**| Give the project a very simple, short, easy-to-remember name. | |
| **Client|**  Insert the client’s name and contact details. | **Mentor|**  Insert the mentor’s name and contact details |

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| **Introduction** | Provide a short overview statement on the project. | |
| **Background** | Provide all the necessary background information that those involved in the project need to understand the client’s situation and need, to prepare a project plan, to manage the project, and to work effectively together. | |
| **Objective** | Provide a simple statement that defines why the project is being done. What is to be accomplished? What is the goal? What is going to be different and better because the project was done? | |
| **Deliverables** | Specify exactly what the tangible outputs of the project will be. These outputs, when completed and delivered, will ensure that the project objective will be achieved. Deliverables are typically the physical thing that is produced by the team (e.g. the documents that present research, plans, or required solutions; product prototypes or design plans, code for software, a structure that is built, signed contracts or agreements, etc. | |
| **Schedule** | Good project management always involved having a very specific and disciplined schedule to ensure the client, student team, and mentor all have a common understanding of the pace and timing of the work and when the deliverables are due. It is not necessary to schedule every single piece of work that is done. However, it is necessary to schedule the due dates for major project “milestones” (i.e. the significant work that must be done at a particular time for the project to progress). This schedule should be prepared up front and updated regularly. For large and complex projects, project management software is typically used. You and your team may want to investigate that option, if our project warrants that level of management. | |
| **Team &**  **Contact Info.** | Insert the name, phone number, & email address of all student team, the mentor, and the client. |  |
| **Team Operating**  **Plan** | Highly-effective teams invest time before starting the project to define and agree on how they will work together. Those plans and decisions should be inserted here and should include things like:   1. Expectations – What are the client’s, mentor’s, and student team’s expectations of each other? 2. Meetings – How often, what days of the week, where, and what time will the team meet? When and how will you use your mentor? When and how will you meet with the client? 3. Communication – How will the team communicate using phone calls, texting, emails, and other tools? 4. Accountability – What are the team’s standards for accountability? How will team hold one another accountable? What standards of behavior are expected (e.g honesty, punctuality, professionalism)? 5. Problems – How will the team resolve disagreements, communication issues, and/or accountability issues when the occur? 6. Decision making – How will the team decide things? Will it be by team consensus (all must agree), by majority rule (most must agree), by assigning decision rights to specific individuals, or some other way? 7. Information management – How will the team create, capture, store, and share information? Will you use Word, Powerpoint, or something else? Will you share by email, by using a share space like Google Drive, or something else? How will you share information with the mentor and the client? 8. Professionalism – How will you interact with the client to ensure a professional standard of behavior? How will you communicate with them? How will you dress when you meet with them? Etc. | |
| **Next Steps** | What are the specific things you need to do to begin the project. Who is responsible? When do they need to be complete? The intent in this section is not duplicate the schedule. It is to ensure you get off to a fast and productive start on the project. | |

Example

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| **Project Name**| “Seed” | |
| **Client|** Jeff Strong | **Mentor|** Joe Hayseed |

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| **Introduction** | Project “Seed” is a project that will determine the best way for Mr. Strong to monetize his five-acre parcel of land in Midway. | |
| **Background** | Mr. Strong has a five-acre parcel of land at 1233 Lone Hawk Lane in Midway (near Soldier Hollow). Currently one acre of that is his personal residence. Four acres are currently being farmed in alfalfa and grass, which is leased to a local farmer for $150/year. Mr. Strong would like to commission a Wasatch CAPS student team to determine if there is another use for the four acres that would produce more revenue, without detracting from the beautiful view and ambiance of the land. Mr. Strong has five water shares. He is willing to invest in any good ideas that have income potential. | |
| **Objective** | The student team’s objective is to develop a plan to increase the revenue produced by the four acres of land. The goal of this plan should be to produce a net profit of $15,000/year and a positive net present value (NPV). Possible uses that can be considered:   1. Alternate crops - growing and selling sod, spruce trees, fruit trees, quinoa, lavender, pumpkins, etc. 2. Animals - raising, selling, harboring, and/or breeding horses, cattle, dogs, llamas, alpacas, etc. 3. Events/other - conducting revenue producing events like a fall/Halloween festival, etc. | |
| **Deliverables** | The following deliverables will be produced:   1. Research – outline the expected expenses, revenue, profit, and required investment of all options 2. Expert opinion – seek and provide substantial expert opinion on the various options 3. A recommendation – make a recommendation of the best three options, along with the associated expenses, revenue, profit, and required investment | |
| **Schedule** | The following schedule will be adhered to:   * Phase I – Research | January 1 – February 28 * Phase II – Experts | March 1 – March 15 * Phase III – Prepare Recommendation | March 16 – April 30 * Phase IV – Present Recommendation | May I * Phase V – Follow-up and Reviews | May 2 – May 15 | |
| **Team &**  **Contact Info.** | Jeff Strong, Ph. 801 915 9713, email: [jeffery.c.strong@gmail.com](mailto:jeffery.c.strong@gmail.com)  Joe Hayseed, Ph. 435 657 0109, email: [joe.hay@yahoo.com](mailto:joe.hay@yahoo.com) | Dallin Plowhead, 435 665 0990, email: [dplow@gmail.com](mailto:dplow@gmail.com)  Suzy Seed 801 222 3344, email: [sseed@hotmail.com](mailto:sseed@hotmail.com)  Danica Racecar 435 211 4444, email: [indy500@gmail.com](mailto:indy500@gmail.com)  Labron James 435 333 7667, email: [lebronmvp@yahoo.com](mailto:lebronmvp@yahoo.com) |
| **Team Operating**  **Plan** | * **Expectations** – The project will be delivered on time and professionally. All parties will respect the meeting schedule by attending and being on time and will enthusiastically interact with one another. Problems will be raised to the mentor first and if necessary the client within 24 hours of occurance. * **Meetings** – The team will meet on T/Th from 1:30-3:00pm at the CAPs office (attendance is mandatory) and will meet with the mentor at 3:00pm each Friday at his office. The client will be given updates every Monday by 5pmby phone conference. Agendas with clear objectives will be prepared for all meetings. * **Communication** – Informal communication can be done by phone or text. Formal communication will be done in meetings and/or by email. * **Accountability** – All parties will be transparent & honest with each other, will be on time for meetings and deadlines, and will keep all commitments meticulously. “Misses” will be diplomatically raised/corrected. * **Problems** – Once a week, a team “hygiene” check will be done in a meeting. Any team effectiveness or accountability issues will be raised and resolved in a courteous and professional manner. * **Decision making** – The team will make decisions by consensus (all must agree). If consensus is not reached, the mentor will be asked to moderate to reach agreement. If consensus is still not reached, a majority vote will be used. * **Information management** – Word, Excel, and Powerpoint will be used. A google drive space will be set up and all team members, the mentor, and the client will have access. * **Professionalism** – How will you interact with the client to ensure a professional standard of behavior? How will you communicate with them? How will you dress when you meet with them? Etc. | |
| **Next Steps** | 1. The student team, mentor, and client all align to the project plan (January 5 - Dallin) 2. Meeting schedule will set and published to all (January 5 - Suzy) 3. The google drive space will be set up and shared with all (January 5 - Danica) 4. The research plan will be designed and aligned to by team, mentor, client (January 15 - Lebron) 5. Research to begin (January 16 – All team members, led by Suzy) | |

Template

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| **Client|** | **Mentor|** |

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| **Next Steps** |  | |