

Project planning and management

Lottery funders look at your plans for running and managing your project when they consider your application. Putting together a project plan will help you to consider the resources required, the ordering and timing of different activities and how you will manage your project. It should cover everything from the activities and tasks required to set up the project through to how you will achieve your project's end results.

The project plan

You should write a project plan listing the main activities of your project. For each activity you then need to consider each of the following:

- what it will do
- what resources you need – including premises, equipment, staff
- when you will do it
- where you will do it
- who will do it
- how you will know whether it has been successfully achieved
- how it contributes to the outcomes for your project.

Pulling together this information for each activity will let you work out what you need to carry out the project, and in what order you need to do things. This will help you justify your project's way of working and the resources you need to achieve its aims. When you develop your project plan, think all the time about what you want your project to achieve and how you will monitor this.

Resources and costs

Once you have decided what resources are needed you should be able to work out how much the project will cost. When you are drawing up your budget, do not cut corners. You will need to justify the amount you have asked for. For example, if you want funding to pay for staff, you will need to show how you decided the posts were required and what the salaries should be. Knowing the full cost of the project will also help you to decide which programme would be appropriate for you to apply to. Please see our information sheet on budgeting.

Management

In the project plan you should highlight who will be responsible for the different activities of your project. This is to make sure the management arrangements for the project are realistic, and fit with the existing structure of your organisation. You need to ensure that you have the relevant skills and experience within your organisation to manage the project. It is common for Lottery funders to ask you who the members of your management committee are and what skills and experience they can bring to the project.

Lottery funders will need to know that you will be able to account for their funding and that you will be able to deliver the project. It is important that you have procedures for handling finances, for example – a proper bookkeeping system, regular financial checks and properly prepared accounts. Lottery funders may also want to look at your policies and procedures, for example on health and safety, employment and equal opportunities.

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Finally, you need to show how your project's users will be involved in managing your project and organisation. We want to see that you consider the needs of, and are responsive to, your target beneficiaries. Please see our Information sheet – Establishing a need.

Monitoring

Lottery funders will want to know:

- what difference the project will make to the people, communities or organisations that you aim to benefit
- how you will know you've made a difference to the people or the organisations your project will benefit.

It is important for you to monitor how well you are achieving your objectives during the life of your project. To be able to do this effectively you need to have monitoring systems at the start of the project and these should be described in your project plan.

If you want to show the value of your work it may be worth evaluating your project. An evaluation will show whether your project has been successful, and what you can learn from this. You can also use an evaluation to help promote your work to other organisations. If you want to carry out an evaluation you should ensure that the costs for this are included within your budget.

Continuing a sustainable project

As part of the project plan you should also consider the future of the project after your Lottery funding finishes. This should include whether the project is time limited, or whether you hope for it to continue. If you aim to continue the work or project you should consider how this will be funded after the Lottery grant you are applying for runs out.

Top tips

A project plan will help you to identify all the resources you need to achieve your project

Once you have a plan for all the project's activities, you can check whether you have adequate management arrangements in place to achieve your project

Further help

Our information on budgeting and legal issues will help you plan and manage your project. There are also many books available on the subject.