

# The essentials to project planning

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## Introduction

This resource has been developed to help support you and your team in delivering projects with successful outcomes.

Use it alongside the [Project Checklist](#) which provides you with an activity list of actions to consider throughout your project - from start to finish.

If there are any areas where you need more help and support in a specific area, you can access comprehensive guidance via items in **bold pink**.

## How to use this guide

Using this ‘Essentials’ guide will help you create a robust prioritisation process, provide structure to your planning, plan your outcomes and proposed impact at the start of your project, and provide tips on measuring and communicating your successes.

Guiding principles to keep in mind throughout this document:

1. The main aim of this guide is to simplify each stage of the process to help you in achieving a professional outcome.
2. Keep your end target in mind and focus on the right thing, not everything.
3. Be realistic. The remit of each local Healthwatch is the entirety of the health and social care system, on often scarce resources. Pitch your outcomes at a level you are confident of achieving.

## Where does this fit with the Quality Framework?

The Quality Framework helps you assess the effectiveness of your Healthwatch and focuses on how you run your Healthwatch. The Project Model focusses on what you do and explains how each step of the project lifecycle will help you deliver projects that make a difference to your communities.

Domain	Quality Framework Rationale	Project Model
<b>Leadership and decision-making</b>	We want to work towards clear goals, have a rationale for our priorities and be well led and governed to navigate a complex environment.	The project model gives you the opportunity to set goals and create a logical plan within the complex environment you work in.
<b>People</b>	We want board and advisory group members, staff and volunteers to have the knowledge, skills and competence they need to deliver an effective, consistent Healthwatch service.	The project model will support your delivery and lays out a professional approach for your team.
<b>Sustainability and Resilience</b>	We have a sustainable and resilient business model that allows us to plan, operate effectively and adapt to the changing needs of the people we serve.	Demonstrating impact of your projects will help secure future funding and ensure Healthwatch is seen as a credible organisation.
<b>Collaboration</b>	We benefit the people we serve by working collaboratively and in partnership with others.	Having a clear model will help you see where you need the support of other organisations to help you achieve your aims.
<b>Engagement, Involvement and Reach</b>	We reach out across the diversity of our communities, so they understand what we do, share their experiences and views of health and care, get the information and advice they need and get involved in our work.	The model gives you the tools to plan your engagement activity and recognises the importance of equality, diversity and inclusion - a vital part of who we are.
<b>Influence and Impact</b>	We work to make the biggest impact by finding out what matters to people and making sure their views shape the support they need.	This tool helps you focus on the importance of creating and communicating your outcomes.

## Nine steps to success

### Stage one: What are you planning to do?

1. Assess your options (background, scope, goals and expected benefits)
2. Make your decision

### Stage two: How are you planning to do it?

3. Plan your activity (Who is involved, your reporting requirements, your budget, timescales, milestones and communications planning)
4. Understand your data protection responsibilities
5. Understand your equality impact
6. Understand your risks

### Stage three: Doing it

7. Deliver your project (Engagement activity, influencing, reporting)
8. Assess and celebrate your outcomes

### Stage four: How you can do it better next time

9. Evaluate your success

## Step one: Assess your options

Before your team starts a piece of work, there'll be a certain amount of research you'll need to undertake to present and enable your boards to make a decision. Each team may approach this slightly differently, but your work must be in line with priorities, ability and resources.

So, before starting any substantive work, do your homework - which means a certain amount of research. How much and how detailed at this stage will depend upon what your project is. You may need to repeat steps one and two depending on the level of information your board requires to make a decision.

**There are two guides that will help you to do this:**

1. **'How to start a research project'** outlines ideas for how to gather a broad range of evidence and insight to help you decide what will form your work plan and provides a consistent approach to narrowing down your options which underpins the decision-making process.

It helps you create a plan that outlines the aim and objectives of your proposed project. This plan should be shaped in a format suitable to be presented at your next board meeting to enable your board to make a decision.

2. At this stage it is important that you have a clear idea of the difference you would like to make as a result of undertaking the proposed project. The **'Making a Difference Toolkit'** guidance is also used in Step three: Plan your activity, but there is advice within it which will help you identify your goal, set your priorities and define your outcomes and is helpful to understand at this stage.

Whilst we cannot always know what we are seeking to achieve when we embark on a piece of work, this first step is about scoping out your intentions and plans before approaching your board / committee to request their assent to commit to embarking on a substantive piece of work. This initial research may also highlight that some projects do not merit being taken forward.

The amount of work and detail you put in at this stage will be different from team to team and project to project depending upon many aspects, from the complexity of the intended work to the leadership style of your board. Defining your outcomes and understanding what changes you are seeking to achieve is critical in your planning discussions.

You should now have a project proposal with enough information for your Board to make a decision.

## Step two: Make your decision

Now that you have gathered the data upon which you plan to ask your board to make their decision, you must follow the decision-making process for your team.

Your Healthwatch should have its own decision-making policy. Our guidance provides you with further background and support.

The guidance suggests the structure is to:

- Gather a robust evidence base - which you have done in Step one: Assess your options.
- Prioritise and choose what will go on your work plan - that's what this step covers.
- Act - which leads us on to the next steps in your Project Model.

Present your proposal at a board meeting to enable your decision-making authority to decide. Ensure any decision made is clearly stated in the minutes of your board, which are publicly available on your website.

At the end of this stage your project will have been approved, refused, or you will be asked to gather more information, by your board.

It is important you understand the reasons your board requests more information or refusals at this stage, as these are important learning points to help you improve the process for the future. Work closely with your board to understand their requirements for future requests.

You should now have:

- a clear decision from your board about your project proposal that is recorded in your board minutes.

## Step three: Plan your activity

Great news - you have the go ahead for your project. Now you can plan how you will deliver it. You will have a certain amount of information collated as part of steps one and two above - now you can add in the details.

There are three key areas you need to plan: your research, how you communicate your work, and the outcomes you want to achieve.

### Research

The [‘Research project planner’](#) will help you map out:

- WHAT needs to be done
- WHO needs to do it and,
- WHEN it needs to be done using the [‘research timeline’](#) template.

*The research team are available at [research@healthwatch.co.uk](mailto:research@healthwatch.co.uk) to quality assure all or part of your research.*

If your project requires you to collect experiences of health and social care from the public, [‘How to develop a survey’](#) will help you understand how to effectively develop and use a survey in your work. It covers the types of surveys you can use, provides tips on questions to use including demographics and survey design.

For projects that include activity such as creating questionnaires, arranging focus groups and engagement events or stalls, [‘How to avoid bias in research’](#) will help you ensure the insight you gather is objective and not influenced by personal views or preconceptions. The guide provides tips on minimising bias including how to choose a representative group of people to collect your data from, different means by which the public can share their feedback, and how to create and ask non-leading open questions.

[‘How to get the right sample for your research’](#) provides more detailed information on how to appropriately represent everyone in your local area by choosing a good sample of participants for the research part of your project and tips on different sampling methods when planning your research model.

It is important that your research is as good as it can possibly be. [‘Quality assuring your research’](#) provides guidance on ensuring that research is worthwhile and feasible at the planning stage - this important step can potentially save you time and resources in the future.

If your project involves working with partner organisations [‘Working with partners and maintaining Healthwatch independence’](#) outlines the benefits of working with others, how to maximise your impact, the importance of clarity and flexibility, and safeguarding your independence including Intellectual Property Rights where relevant.

### Communications

There are a number of things to think about when planning your communications and [‘How to plan your communications’](#) is a useful planning checklist you can use. It covers the whole range of your project lifecycle from setting goals, target audiences, key partners and stakeholder

engagement, success measures, audience insight, messaging, 'hooks', team resources, risks, the use of spokespeople, key dates and dependencies, format channels and outputs, and evaluation.

You may already have developed an overall communications strategy, if so, it will help you in planning individual projects. Our guide '[How to develop a communications strategy](#)' helps you to articulate what you want your communications to achieve by understanding where you are now, identifying your audiences and approach and setting measurable objectives.

## Outcomes

When planning a project, it's important that you make clear at the start what outcomes you want to achieve through your project and identify the steps you need to get there.

The '[Making a Difference Toolkit](#)' aims to help you understand how you can make a difference by using a methodology called the '[Theory of Change](#)'. The toolkit includes a step by step guide to understanding and measuring the differences you make and a range of resources to help you in practical ways.

There are three further parts of your planning approach that merit separate steps of their own in a local Healthwatch work as they are so important to us and our brand - the next three steps cover these areas.

You should now have a project plan covering research activity, communications and your planned outcomes

Top tip: the '[Project Checklist](#)' can be used as a comprehensive project plan.

## Step four: Understand your data protection responsibilities

This is such an important aspect of your planning in local Healthwatch that it warrants a section of its own. Take care not to underestimate the importance of data protection and understand where the collection, analysis and management of data fits within your project. If at any stage of your project you are gathering views from the public, you will need to undertake this stage and create a data protection impact assessment.

[‘How and when to do a Data Protection Impact Assessment’](#) along with a [‘Data processing impact assessment template’](#) will guide you through the process.

Once you have completed the above process, if your project involves speaking to people and recording the information they provide, the impact assessment will highlight the need to obtain consent to process, record, hold, access, review, alter, use, share or disclose their personal data.

[‘Obtaining consent’](#) guidance helps you with obtaining consent from the general population, children, people lacking capacity and people who require reasonable adjustments. It also provides templates for ‘phone scripts’, ‘consent forms’ including ‘consent to use images’, and project ‘information sheets’ (a project information sheet will help you inform participants how their information will be used and assure them around confidentiality and anonymity).

You should now have a data processing impact assessment.

## Step five: Understand your equality impact

Healthwatch projects often seek to ensure that people who find it hardest to be heard can influence the design and delivery of health and care services. It is therefore important that when you are seeking outcomes, the equality impact is thought through.

[‘Engaging seldom heard groups in Healthwatch research’](#) will help you when considering the views of underrepresented groups. Take time to build trust with the communities you want to reach, work with community leaders and existing groups to find a way in and then engage people on their terms. Be prepared to answer people’s questions about how you will make a difference as some people may be frustrated that the feedback given to services in the past has not been addressed.

Your Healthwatch England reference document here is the [‘Equality Impact Assessment form for proposed project outcomes or recommendations’](#).

This form is designed to help you illustrate that when outcomes are achieved and recommendations implemented, they lead to increased equality and reduce barriers for protected groups and others who experience discrimination or disadvantage; whilst not inadvertently excluding others.

When recording your demographic data, [‘How to record demographic information in your data collection tools \(e.g. CRM\)’](#) offers direction towards consistency of data gathering amongst all Healthwatch teams.

You should now have an equality impact assessment ready to go.

## Step six: Understand your risks

An important part of your project planning is to assess the risks for everyone involved. [‘Thinking about ethics and risk when planning research’](#) is a useful reference document for helping you consider and manage the risks inherent in your project and sets out a series of helpful tips to consider when assessing the needs of your project. It outlines considerations about data security and protection, the wellbeing of participants and the wellbeing of staff and volunteers taking part in the project.

It also will take you through a process to help you ensure the work you are planning is necessary, robust, proportionate, legitimate, appropriate, and what to do if after considering those areas, the risks outweigh the benefits.

[‘Assessing risk and safeguarding’](#) is part of the ‘Call handling guidance’ resources - but the information within that document can be used for other forms of engagement. It contains a useful set of questions to help you recognise a potential safeguarding risk, your responsibilities regarding safeguarding and the responsibilities of your local statutory partners. It also covers insight on how you might recognise if someone you are engaging with is at risk of suicidal action and the initial action you need to take. Importantly it also provides advice on looking after your own wellbeing.

You should now have a project risk assessment document stating how you plan to manage and mitigate any identified risks.

## Step seven: Delivering your project

You are now ready to get out there with your team and deliver your project.

### Engagement with impact

We want our work to have the most impact possible and have the power to change opinions on how services can be delivered. There are many ways to effectively engage within your local communities. The nature of your project, its aims and potential benefits will inform which way is best for you.

You can find helpful resources [here](#) covering a wide range of subjects including:

- Digital working such as online engagement techniques and video diaries.
- Models of engagement for specific diagnoses such as dementia, or specific communities such as seldom heard groups.
- [Enter and View](#) focussed projects.

Have a look on the link above for the full and up to date range of resources to help you.

### Analysing your data

If your project includes any form of research, analysing the data collected is a vital stage of your research. Robust analysis will allow you to identify your most impactful results and form your opinions and advice. [‘Quality assuring your research’](#) provides guidance on analysing the data you have collected.

### Influencing through strong communications

The successful delivery of your project may involve influencing those who are able to make real change to health and social care services. Powerful stories are key to our work and people’s stories are at the heart of everything we do. [‘How to tell a strong story’](#) gives ideas on gathering the facts, developing your angle, the art of persuasion, and the benefits of a good edit. There are further [‘Storytelling tips’](#) covering the importance of having strong relationships with your community including joining support groups [here](#).

### Reporting

The final part of your delivery will be producing a report in a format appropriate for your project. Evidence clearly communicated in an engaging way is more likely to be acted upon. [‘Writing up your research or engagement findings into a report’](#) takes you through writing a report, including an executive summary, an introduction, covering demographics findings, how to report your findings, top tips for presenting recommendations and how to finish your report. There is a template you can download and edit. If you need further help with developing effective recommendations, our guidance will help you to consider the crucial elements behind developing successful recommendations, including:

- What to think about at the start of a project
- When to work with stakeholders and people
- How to keep pressure on services once you have finalised your recommendations

In addition, [‘Quality assuring your research’](#) offers tips on checking your report to ensure your research is clearly articulated, your findings are clear, and the facts are accurate.

You should now have an end of project report in an appropriate format.

## Step eight: Assess and celebrate your outcomes

It is important that we recognise our influence and share that with our local communities so they can see who we are and how we can support them and play our part in creating real and tangible changes to services for users and providers, sometimes changes to policy or third sector organisations.

The [‘Impact tracker’](#) is designed to help your team summarise the outcomes and wider impact you have achieved in a single document, record activities and recommendations as you go to help you plan follow up work after reflecting on the results so far and reduce the possibility of impressive achievements being overlooked. This approach can also help you to review which areas of your work lead to the greatest success, ensuring that details about your achievements can be accessed more easily for reporting and publicity purposes.

[‘How to communicate impact’](#) will provide ideas on how to communicate the difference you’ve made to services.

[‘How to pitch your story to the media’](#) gives advice on what makes a good story, selling your story, help with reaching journalists and understanding what they want, and help with creating a press release.

[‘How to create an impact page on your website’](#) offers tips on how to show the public how much of a difference you have made to your community.

Each project will have different ways of communicating outcomes - being creative will help attract attention to your success stories. Case studies and finding innovative ways to let your communities understand how sharing their experiences has led to real change are your aims at this stage of your project.

You will now have:

- An example that demonstrates why it’s important that people share their views with Healthwatch and the difference it makes that you can share online and via the media.
- A great case study that you can share with commissioners and service providers that highlights the value of Healthwatch and the difference you make.

## Step nine: Evaluate your success

Evaluation is an important part of any project. Spending time looking at what was successful and what could be better will help you understand the impact you're making and where you could improve next time.

There are two distinct areas which you will benefit from evaluating:

- **What difference did you make to your communities?** Did providers act on your recommendations? Are there insights that you can take forward to your next project around planning, influencing or collaboration?
- **Lessons learned from the project.** This is about how you and your team conducted the project. If you had your chance again how would you do things differently and how will these insights change the way you approach your next project?

You should now have a 'lessons learnt' report ready to go

## Congratulations!

If you have been through all the steps above, you should have now successfully completed your project. You should have a good understanding of what went well and what could be improved next time.

## Frequently asked questions and concerns

### My project doesn't fit into a neat order of sequential steps

Working on any project is not a linear exercise, and you will find that in practical terms you do not experience your project step by step, as many steps overlap. Each project is unique, and the order and content of this guide is there to be adapted to the needs of each unique project. For example, how you set your long term and short-term priorities may require you to adjust the order of the approach outlined here. Each stage is a complete unit and has been created to enable you to build your own project model that suits your needs.

Have a quick look through the guide before you start as there are some resources in later stages which, depending on your project you may find useful to be aware of in the planning stages. For example, if your project is related to dementia, there is an excellent report on the Healthwatch Resources web page which takes you through all stages of project planning and delivery as experienced by Healthwatch Wiltshire.

### How can I access the documents referred to in the guide?

All documents we refer to are hyperlinked in this document in bold pink text. You can also find a list of the resources mentioned at the back of the document. All guidance can be found in the resources section of the Network website for Healthwatch staff and volunteers (<https://network.healthwatch.co.uk/resources>).

### My team is just me and a part timer - I don't have time to produce lots of documents.

This model recognises that all teams have different levels of resources to call upon. Whilst each step in the project model is essential, the outputs you create will be different and reflect the size of your team as well as the project itself. For example, in step one your 'project proposal' may be a few paragraphs outlining key information, or it may be a 20-page research report. Only you can decide how you need to marshal your resources to meet the requirements of each stage in relation to the resources you have within your control.

### Do you have a checklist that I can share with my team, allocate specific responsibilities and use as an activity planner for my project?

Yes. **[The Project Checklist](#)** will help you create an activity planner, act as a guide and provide an audit trail if needed. It is produced in Excel to enable you to adapt it to your team's needs, and the individual circumstances of each individual project you will undertake.

The checklist also includes a section on priority setting, which helps you decide which projects you take on.