Activity: Pilot Project Plan Template

Goals

1. Develop a plan to communication information and decisions with your community

Prerequisites

None

Who Should Participate?

Program management (tactical thinkers)

Length

90 minutes

Overview

A pilot can be defined as "an initial small-scale implementation that is used to prove the viability of a project idea...With a pilot study there is generally a high degree of uncertainty and there needs to be recognition on the part of both the project team and the governing stakeholders that **the purpose of the pilot stage is primarily to prove viability, not deliver an agreed outcome**."[1]

Why create a pilot project plan? It takes work to turn ideas into real program operations, and a pilot plan can help organize that transformation. A good pilot plan can:

- Help program leadership understand the scope and goals of the project

- Help program management balance the resources required to complete the pilot with other program commitments

- Help program operations to understand their roles and responsibilities

- Help the entire program team see if the pilot concept would work in production, or how it may need to be modified for a successful implementation

Activity Instructions

1. View the pilot project plan outline below

2. Edit the plan outline to match the needs of your program

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1 https://www.apm.org.uk/resources/find-a-resource/what-is-the-difference-between-a-trial-and-a-pilot/

Pilot Project Plan Template

1. Concept / Scope

A brief description of what you are planning to pilot, along with any notes about what is in or out of scope for the pilot.

2. Statement of Need

Why are you piloting this new program activity? Documentation and other outputs from an ITAViP Activity can be a solid basis for a statement of need.

3. Mission and Vision Alignment

How does this proposed pilot support and further your program's mission and vision, or a specific strategic objective?

4. Pilot Goals

What are the core goals of the pilot? Try to enumerate SMART goals: Specific, Measurable, Achievable, Relevant, and Time-Bound.

5. Risks (and Countermeasures)

What risks to the program might the pilot introduce? What is your plan to counter these risks?

6. Roles and Responsibilities

Complete a RACI matrix (sample below) for the tasks required to meet each goal listed above. A RACI matrix is a responsibility chart that maps out each task and milestone or key decision involved in completing a project, and assigns which roles are Responsible for each action item, which are Accountable, and which needs to be Consulted or Informed.

7. Timeline

What is the timeline for the pilot? If you don't have a specific start date, you can create a timeline based on milestones (e.g. Milestone 1, Months 1-2; Milestone 2, Months 3-5, etc.) and fill in dates once the project begins.

8. Evaluation Methodology / Acceptance Criteria

What are the acceptance criteria for the pilot? How will you measure the outcomes? What metrics will help program leadership decide whether to continue the pilot, pivot to a different concept, end the pilot, or make the activity part of normal program operations?

Completion of each milestone is an opportunity to evaluate the pilot - at each of these points, the program may choose to make a continue/pivot/end decision.

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9. Resource and Spending Estimates

What financial, human, and technology resources will the pilot require? Be honest about the amount of work the pilot will be, so program leadership understands the tradeoffs (i.e., if you are spending time on the pilot, you are not spending time on other things).

ALL FACETS, ALL PHASES

Getting Started, Growing, Assessing and Evolving

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RACI Matrix Example

Key:
R: Responsible
A: Accountable
C: Consulted
I: Informed

Task List	Role or Person 1	Role or Person 2	Role or Person 3	Role or Person 4
Task 1	A	R	C	
Task 2	A		R	I
Task 3	AR			I
Task 4	A	R	I	C