Project Brief Template

Organisation name

Date

## An introduction to this briefing template

This briefing template has been designed by [CAST](https://wearecast.org.uk/) and [Catalyst](https://www.thecatalyst.org.uk/).

Use this template to create a simple brief to help you find a digital agency. Either make a copy of this template and edit it to create your own brief. Or download it by clicking File > Download, in the menu above.

This brief won't communicate absolutely everything about your project. It is designed to help you focus on crucial information, so you can start meaningful conversations with potential partners.

Once you’ve produced your brief you can share it with a shortlist of digital partners. To create a shortlist of possible partners you can either ask someone for recommendations, post to [Digital Charities Slack](https://digitalcharities.org/) for recommendations, or use [Dovetail](https://www.dovetail.network/).

The aim is to have a chat with 3 or 4 organisations, then ask 2 or 3 to write a short proposal. Then after that, recommend having a workshop with a couple of organisations to help to see how you work together.

For more guidance, see these NCVO articles:

* [Great conversations with digital partners](https://www.ncvo.org.uk/help-and-guidance/digital-technology/digital-advice-and-support/great-conversations-digital-partners/)
* [Choosing the right digital agency or freelancer](https://www.ncvo.org.uk/help-and-guidance/digital-technology/digital-advice-and-support/choosing-right-digital-agency-or-freelancer/)

Delete this intro section when you are ready to send out your brief.

## Project overview

*A paragraph or two outlining the overall project aims and background.*

## Author details

* Name:
* Role:
* Email:
* Contact number:
* LinkedIn (URL):

## Charity details

* Charity name:
* Charity website (URL):
* Location:
* Mission:

## Charity experience

* Our experience of:
	+ Creating digital products & services:
	+ Working in agile ways:

## Project aims

* Objective:
	+ *Note: This could be to improve or optimise or an existing digital product or service. Or it could be to define or build a new digital product or service from scratch.*
* Target users:
* Target users’ needs:

## Project details

* Budget:
	+ *Indicate the total, or a budget range (if the budget is known).*
* Budget status:
	+ *Indicate if budget is signed off, close to sign off, fully signed off.*
* Project kick-off date:
* Project launch date:

## Project needs

* Partner values:
	+ *Make a note about what values you’re looking for in a partner.*
* We need help with:
	+ *Try to list out what you need help with. i.e. research, design, build.*
* Partner experience:
	+ *Make a note of the sector experience the ideal partner will have.*
* Technical requirements:
	+ *Make a note if you have certain technical requirements (i.e. you need to work with a certain programming language or need to integrate with another service).*

## How to respond to this brief

We’ve emailed this brief to [insert number] organisations.

If you’re interested in responding to this brief, please email the author, above. Send a paragraph or two by [insert date], outlining why you think you’d be great for this project.

In the first instance, we’d like to arrange a chat with 3 or 4 organisations. From there we’ll ask 2 or 3 to write a short proposal.

Ideally after that, we’d get together for workshops with 2 organisations to see how we might work together - then we’ll be in a good position to make a decision.

If you have any questions about this brief, how to respond, or the process, please email the author.