



Work plans provide a framework for planning and serve as a guide during a specified time period for carrying out work. An organization's commitment to planning can be measured by the extent to which it completes work plans to reach each strategic goal and determines various methods to verify and evaluate the actual implementation of the work to be done.

Organizations should have annual work plans for each unit that corresponds to their fiscal year. The work plan includes a schedule of events and responsibilities that details the action to be taken to accomplish the goals and strategies laid out in the strategic plan. The core of an organization's annual work plan consists of objectives developed to be consistent with the goals and strategies of the strategic plan. These objectives are specific, concrete, measurable statements of what will be done to achieve a goal and state what will be accomplished by when, and by whom, generally within a one-year timeframe.

What Is a Work Plan?

In constructing an overall work plan, it is important to consider how to link the strategic plan to daily operations. This requires a realistic view of the scope of work to be undertaken by linking planned actions to available resources. A work plan should be developed for every major unit of the organization and for each employee. The employee work plans should depict how the organization's overall work plan will be implemented.

The Alliance for Nonprofit Management (www.allianceonline.org) suggests including the following characteristics for an effective work plan:

- An appropriate level of detail—enough to guide the work, but not so much that it becomes overwhelming or confusing or unnecessarily constrains creativity.
- A format that allows for periodic reports on progress toward the specific goals and objectives.
- A structure that coincides with the strategic plan—goal statements for the strategic plan and the work plan are one and the same, but objective statements are different.



Elements of a Work Plan

The text of the work plan comprises several sections: introduction, background, goals, objectives, outputs, resources, constraints, strategy and actions. An effective work plan may look like this:

- Abstract or executive summary
- Introduction and background (identifies the problems)
- Goals and objectives (defines the solutions; refines the goals)
- Resources and constraints (indicates what is available to reach the objectives)
- Strategy and actions (indicates how the resources will be converted to objectives, then goals)
- Appendices (budget, schedule and other useful information)

Abstract or Executive Summary

Write this part last, and make sure it is a summary, not an introduction. Ideally, this should be one or two paragraphs long, covering a half a page.

Introduction and Background

Do not copy or repeat the background information of the strategic plan—that was useful for justifying the overall program but not for the specific time segment of the work plan. In the “Background” section of the work plan, include only information or references that refer specifically to those outputs and objectives you wish to achieve during the period covered by the work plan.

The background should contain:

- Information gleaned from the previous quarterly report, especially the recommendations
- Any relevant changes in conditions in the environment that may or already have affected operations
- Any relevant effects or results of activities that may call for changes in operations or the design of activities
- Any other references that will justify the selection of objectives and outputs for the planned period



Goals and Objectives

The work plan should have a logical progression from the introduction and background to the goals and objectives. Where the background explains the selection of the problems to be solved, the goals define the solutions to those problems. The objectives, then, are more precise, finite and verifiable derivations of the goals.

Keys to Developing Objectives and Timelines

- While identifying objectives, keep them realistic by asking if this can truly be accomplished.
- Integrate the current year's objectives as performance criteria in each "implementer's" job description and performance review.
- Remember that objectives and their timelines are only guidelines, not rules set in stone. They can be deviated from, but deviations should be understood and explained.

Resources and Constraints

The "Resources" section should indicate what may or will contribute to reaching the identified and selected objectives. Include resources that are not necessarily liquid cash at this time such as staff and other personnel (e.g., volunteers); partners (organizations and individuals); consultants; land; capital; supplies; equipment; other inventory that can be used, sold or traded; and anything else that can be mobilized and used in reaching the identified objectives.

The "Constraints" section should identify any restrictions or hindrances that must be overcome to reach the objectives. Include a short description of how to overcome them.

Strategy and Actions

The "Strategy" section should indicate how to convert resources and overcome constraints, using those identified inputs (resources) to reach the objectives or attain the outputs specified. Actions primarily belong to strategy because they are the activities that convert inputs into outputs. Where the goals and objectives are among the outputs of the project, the resources are among the inputs.



Appendices

Appendices supplement the text, providing details that support the argument. Budgets and schedules are among such details.

The work plan for each major unit and employee, might specify:

- The goal(s) that are to be accomplished
- How each goal contributes to the organization's overall strategic goals
- What specific results (or objectives) must be accomplished that, in total, reach the goal of the organization
- How those results will be achieved
- When the results will be achieved (or timelines for each objective)

Work Plan Accountability

It is important to develop a process for tracking progress of the work plan. Ideally, this occurs quarterly. During the tracking process, identify if an action has been completed, is in progress, is delayed or if there is a barrier. Early identification of problems and early intervention ensure that the work plan keeps moving forward. It is also important to highlight successes and celebrate them.

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