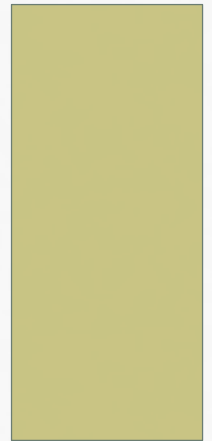




# WORKPLAN DEVELOPMENT

HOW TO ENSURE DELIVERABLES ARE BEING  
ACHIEVED AND DOCUMENTED



# WHAT IS A WORKPLAN?

- Program management tool
- Provides direction and guidance

# WHY USE A WORKPLAN?

- Makes program more efficient and effective
- Succinctly states goals and objectives
- Determines program's priorities
- Establishes consistent structure
- Links to program budget
- Provides template
- Provides revision mechanism
- Assists programs with staff training
- Makes program more effective
- Acts as a guide for the work that will be completed

# PARTS OF A WORKPLAN

- Goals
- Measures of effectiveness
- Measurable objectives
- Activities
- Data
- Timeframe
- Responsible party

# HOW DO I GET STARTED?

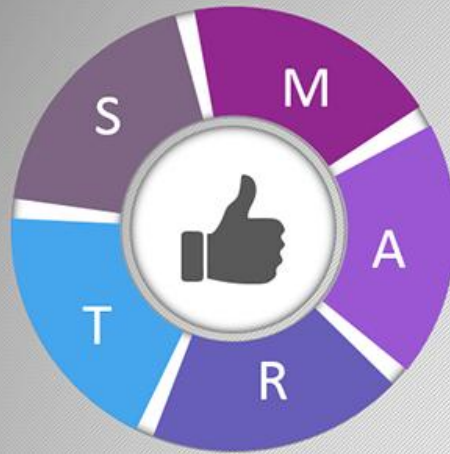
## Questions to Ask Yourself

- Timeline -- when do I start this process for the next year?
- Who do I need to talk to?
- Do I need approval from a board or supervisor on these documents before the final documents are submitted ?
- Do we have templates for these documents?

# WHAT ARE SMART OBJECTIVES?



# SMART OBJECTIVES



**SPECIFIC**  
Details Exactly what needs to be done

S

**M** **MEASURABLE**  
Achievement or progress can be measured

**ACHIEVABLE**  
Objective is accepted by those responsible for achieving it

A

**R** **REALISTIC**  
Objective is possible to attain  
(important for motivational effect)

**TIMED**  
Time period for achievement is clearly stated

T

# THINGS TO CONSIDER WHEN WRITING OBJECTIVES

- What big steps do we need to achieve the goals?
- Where do we need to focus?
- Does this move us toward the overall goal?
- Is this a reasonable next step?
- Is this step clearly measurable?



# HOW TO DEVELOP GOALS

- General, big-picture statement
- Clear outcome that will fulfill program mission
- Goal statements = global outcomes

# SAMPLES ARE VERY USEFUL TOOLS

- You can find many sample workplans on-line
- These can provide a great “jumping off point”
- Remember that workplans can differ in formatting and wording.
- If you are provided with workplan and budget templates, stay consistent with the terminology used in the template
- Let's look at a sample.....



# WORKPLANS COME IN MANY FORMATS

## OUTCOME #2 WORKPLAN

| Activity   | Inputs   | Time Frame  | Responsible Person | Anticipated Outputs   | Progress Reporting<br>(Complete for Progress Report Only) |
|--|--|-------------|--------------------|---|---|
| Obtain topical fluoride and associated supplies.   | <ul style="list-style-type: none"> <li>▪ Dental Clinic Coordinator</li> <li>▪ money for supplies</li> </ul>                  | 11/07       | Joe Smith          | Supplies obtained   |   |
| Recruit and hire dental hygienist  | <ul style="list-style-type: none"> <li>▪ Community Health Director</li> </ul>  | 11/07       | Joe Smith          | Hygienist hired   |   |
| Dentist trains pediatrician and nurse practitioner(pilot clinical team) to apply topical fluoride  | <ul style="list-style-type: none"> <li>▪ dentist</li> <li>▪ pediatrician</li> <li>▪ nurse practitioner</li> </ul>            | 12/07       | Joe Smith          | Dentist and nurse practitioner trained  |   |
| Pilot clinical team provides topical fluoride applications during well-child visits  | <ul style="list-style-type: none"> <li>▪ pilot clinical team</li> </ul>  | 1/08-4/08   | Joe Smith          | 30 children per week receive topical fluoride applications from pilot clinical team |   |
| Hygienist coordinates evaluation of the project and works with pilot clinical team and pilot oversight team to identify any issues of pilot implementation | <ul style="list-style-type: none"> <li>▪ hygienist</li> <li>▪ pilot clinical team</li> <li>▪ pilot oversight team</li> </ul> | 1/08-4/08   | Joe Smith          | 5 meetings held and evaluation data collected.                                      |   |
| Hygienist works with medical providers and pilot clinical team to improve implementation process   | <ul style="list-style-type: none"> <li>▪ hygienist</li> <li>▪ pilot clinical team</li> </ul>                                 | 01/08-04/08 | Joe Smith          | Implementation process improved.  |   |
| Dentist trains additional clinical teams   | <ul style="list-style-type: none"> <li>▪ hygienist</li> <li>▪ pilot clinical teams</li> </ul>                                | 05/08-06/09 | Joe Smith          | 3 clinical teams trained  |   |
| Hygienist provides on-going consultation and support to clinical teams   | <ul style="list-style-type: none"> <li>▪ hygienist</li> </ul>  | 05/08-06/09 | Joe Smith          | Support provided to clinical teams as needed  |   |

# THEY CAN BE SHORT OR VERY LONG!

## OUTCOME #2 EVALUATION PLAN

| Outcome #2: Outcome Indicator(s)  | Data Collection Method and Timeframe                            | Evaluation Results<br>(Complete for Progress Report Only) |
|---|---|---|
| <ul style="list-style-type: none"><li># of children receiving topical fluoride applications</li></ul> | <ul style="list-style-type: none"><li>Project Records</li></ul> |   |

# HOW DO I ANSWER MY QUESTIONS?

- If you are working on a grant, typically the answers will be found in the grant document (RFR/RFQ) itself.
- If you are responding to an agency that is dispersing funds as part of a larger grant, that information is typically found within the deliverables.
- The deliverables should inform your workplan as to what you need to achieve relative to goals and expected outcomes. The budget should be tightly linked to those workplan goals.
- If you still have questions, see if there is a phone number or a website that posts FAQ's