Organizational Work Plans

Road Maps to Achieving your Vision
Setting the Vision
What is a WORK PLAN?
A Work Plan is a living road map that guides an organization through the process of prioritizing goals, specifying details and assigning resources to achieve success.
Why is it Living?

• We don’t control some factors
  – Economy
  – Weather
  – Market Trends
  – Lifestyle changes

• It needs to be adaptable
Prioritizing Goals

- What can be done quickly
- What requires the least resources
- What will make the biggest impact
- What will require the most planning
Parts of a Work Plan

VISION

• Objectives
  – Tasks
    • Responsible Party
    • Resources Needs
    • Timeline to Complete
    • Status
Objectives

How do we break the vision down into manageable work that can be implemented?
Tasks

How do we move the objective further this year?

• Tasks should not be multi-year
• They should be specific and short
• They should be singular in nature
• They should flow
Tasks Must also include...

**Point Person:**
Defined as a lackey ... one who will face stiff punishment if they do not pull their own weight on the team 😊

Who is the best person to get the work done? Will they do it?
Tasks Must also include...

Resources:
What is needed to do this task?

• Money
• Technical Support
• Staffing to facilitate
• Identifying Partners
• Outreach Plans
Resources

Make sure that your resources are adequate. Don’t assign a point person to finish a task and not give him/her the tools they need to complete the work.

Use the money needs to build an organization’s working budget.
Timeline

- When will the task start?
  - Is it immediate/seasonal?
  - Is it a one-time task?
  - Is there a hard deadline to complete?
- Or is there a target date?
The work plan should be reviewed on a regular basis.

Each task should be reviewed if it has not been completed to make sure everyone is aware of the next steps.

If a task has been completed, there needs to be a check box to show that it is done and no longer on the list of pending work.
Other Best Practices …

• Make the work plan accessible to the public to review
• Use the work plan to create a report back at the end of the year to show progress for the year
• Provide updates on the work plan to the partners and elected officials.