



Creating a Workplan

What is a workplan?

Workplans (also known as action plans) are valuable tools to support the development, implementation and evaluation of programs.

Workplans identify **what** actions need to happen, **who** will do them, **when** they will be completed and **what** resources will be required.

Resources:

2004 Work Plan Fact Sheet
www.city.toronto.on.ca/grants/btcv/pdf/workplan_factsheet.pdf

Creating a Work Plan.
<http://ads.ahds.ac.uk/learning/walkabout/fieldwork1.html>

Creating a Work Plan
www.techsoup.org/howto/article.page.cfm?articleid=788&topicid=7

Creating a Workplan
(March 2003)
www.yapa.org.au/facts/workplan.pdf

How to Create a Workplan

Purpose: What goal are you trying to achieve or questions are you trying to answer?

Timelines: When will the project be completed? (NOTE: Some timelines may already be set for you (e.g., evaluation report due, funding proposal deadline) and you may have to work backward from them.)

Highlights: Are there any criteria or constraints that impact your project? (i.e., must enhance customer service, must be easy for staff to understand and interpret, must align with agency's guiding principles and core values, etc.)

Objectives: What are the project milestones? These are the main steps or phases of your project that must be completed.

Project Phase/Milestones: What are the major steps that need to be taken to achieve the goals of the project? (e.g., conduct needs assessment, consult external stakeholders, Identify best practices).

Major Tasks/Activities: What tasks and activities need to happen under each project phase or milestone? (i.e. Identify existing gaps in services, develop stakeholder survey, conduct Internet search for best practices).

Estimated Timelines: When does each simple action step have to be completed by? (TIP: include both the start and completion dates to help ensure enough time is budgeted to complete each task). Some timelines may already be set for you (i.e. funding application deadlines) so you will have to build your workplan around them.

Responsibility/Lead: Who is responsible for ensuring the action step is completed? Each simple action step should be allocated to a specific person (or persons) for action; this person is known as the "lead."

Required Resources: What might be needed in order for each step to be completed? (For example, is printing or administrative support required?) This should be reviewed with the lead.

WORKPLAN TEMPLATE

Project Name:
Team Members:

Purpose: What goal are you trying to achieve or questions are you trying to answer?

Timeline: When will the project be completed? (NOTE: Some timelines may already be set for you (e.g., evaluation report due, funding proposal deadline) and you may have to work backward from them.)

Highlights: Are there any criteria or constraints that impact your project? (i.e., must enhance customer service, must be easy for staff to understand and interpret, must align with agency's guiding principles and core values, etc.)

Objectives: What are the project milestones? These are the main steps or phases of your project that must be completed.

Project Phase/Milestone	Major Tasks/Activities	Estimated Time Frame	Responsibility/ Lead	Required Resources	Status/ Comments
<p>What are the major steps that need to be taken to achieve the goals of the project?</p> <p>(e.g., conduct needs assessment, consult external stakeholders, Identify best practices).</p>	<p>What tasks and activities need to happen under each project phase or milestone?</p> <p>(i.e., identify existing gaps in services, develop stakeholder survey, conduct Internet search for best practices).</p>	<p>When does each simple action step have to be completed by?</p> <p>(TIP: include both the start and completion dates to help ensure enough time is budgeted to complete each task).</p> <p>Some timelines may already be set for you (i.e., funding application deadlines) so you will have to build your workplan around them.</p>	<p>Who is responsible for ensuring the action step is completed?</p> <p>Each simple action step should be allocated to a specific person (or persons) for action; this person is known as the "lead."</p>	<p>What might be needed in order for each step to be completed?</p> <p>(i.e., is printing or administrative support required?) This should be reviewed with the lead.</p>	