

WORK PLAN -- Guidelines

Overview

NORC programs design and implement projects that meet both individual and community needs. To advance these projects, partners need to agree on what they are trying to accomplish and make decisions about the project's focus and activities. A work plan can serve as a useful management tool in doing this. The intent of a work plan is to answer the following key questions:

- What is the issue or problem?
- What are you trying to do to address it?
- What activities will you design and how will they be implemented?
- Who will do what?
- What additional resources and staffing will you need?
- How long will it take?
- What are the expected deliverables/results?

Developing a work plan should be an inclusive process, which involves your partners and other stakeholders. Without consensus on the project's work plan, the project is likely to stall. NORC program leaders should feel free to edit this tool, so that it meets your needs.

The following tool was created to provide guidance in the work plan development process. The components of a work plan include:

- Problem Statement
- Project Goal
- Project Objective
- Activities
- Person Responsible
- Timing
- Products/Results

Included in this tool are descriptions of the key components of a work plan, a work plan template with instructions, and a blank work plan template.

Problem Statement

A problem statement is a brief summary that does the following:

- Identifies the problem that your project seeks to change—for example, high rates of emergency room usage.
- Identifies the causes of the problem—for example, high emergency room use may be caused by falls, poorly managed chronic conditions, or a lack of access to primary care. (Be sure to consider all possible causes of the problem—for example, age, medication, physical limitations, and the environment often combine to increase the risk of falls.)
- Identifies the affected population—for example, the senior residents of a NORC.

A clearly specified problem statement is an important first step that will guide your efforts to set goals and objectives, and design and implement your project.

Project Goals:

The project goals should describe what the project hopes to accomplish, who will be affected, and what changes it expects to produce. Unlike project objectives, project goals are typically broad statements that provide overall direction for the project. Project goals should include two basic pieces of information: who will be affected and what will change as a result of the project. Goals typically include verbs such as improve, prevent, increase, promote, or reduce. Examples of project goal statements include:

- To reduce risk factors for falls among elderly patients admitted to the emergency room.
- To promote/increase the social connectivity of seniors in the community.
- To prevent adverse drug events among seniors in the NORC program.

Project Objectives:

An objective is a specific and measurable condition that must be attained to accomplish a particular goal. Effective objectives clearly state the outcome to be achieved (“what”), the time frame for achieving it (“when”), the criterion for deciding whether the outcome has been achieved (“how much”), and the priority population served (“who”). Project objectives need to be specific; objectives that are too broad may not provide enough guidance. Examples of project objectives include:

- In the first six months of the project (when), we will have identified all (how much) clients (who) at risk of falls (what).
- By the end of the year (when), we will create new social connections (what) with the community for 50% (how much) of the home bound seniors (who) living in the NORC.
- Within the first year (when), all (how much) of the high-risk patients at risk of drug adverse events (who) will have a plan of care in place (what).

Activities:

Activities describe what you plan to do to bring about the intended objectives for the project. Describe the activities you intend to conduct, for example, trainings, educational sessions, surveying, health screening, meals distribution, proposal writing, volunteer recruitment, etc.

Outputs/Results:

The section captures what you anticipate will happen as a result of a project's activities, the quantifiable results. It should describe what you hope to accomplish, such as the number of people you will survey or train, or it could include the establishment of a food pantry or obtaining funding for a specific project.

Person Responsible and Time frames:

The work plan also includes sections for identifying who will be responsible and accountable for carrying out the specific activities and the expected time frame for doing so. Try to be realistic about how long activities will take, so expectations are reasonable.

WORK PLAN INSTRUCTIONS

Problem Statement:

Briefly describe the problem that the project aims to address, as well as its causes, and the population affected.

Project Goals:

Briefly describe overall project goal (i.e., solution to the problem specified in the problem statement).

PROJECT OBJECTIVE #1

Briefly specify main project objectives (i.e. what needs to take place for the goal(s) to be achieved).

KEY ACTIVITY A.

Period	Activities	Products/Results	Person(s) Responsible	Notes
<i>Time period associated with each activity.</i>	✓ <i>Describe what you plan to do to bring about the intended sessions, surveying, health screening, meals distribution,</i>	<i>Describe what will happen as a result of the project's activities.</i>	<i>Identify who is responsible</i>	

KEY ACTIVITY B.

	✓			
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PROJECT OBJECTIVE #2

Briefly specify main project objectives (i.e. what needs to take place for the goal(s) to be achieved).

KEY ACTIVITY A.

Period	Activities	Products/Results	Person(s) Responsible	Notes
<i>Time period associated with each activity.</i>	✓ <i>Describe what you plan to do to bring about the intended project objective listed above. Describe the activity you intend to conduct, for example, trainings, educational sessions, surveying, health screening, meals distribution, proposal writing, volunteer recruitment, etc.</i>	<i>Describe what will happen as a result of the project's activities.</i>	<i>Identify who is responsible</i>	

KEY ACTIVITY B.

	✓			
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WORK PLAN FOR

Problem Statement:

Project Goals:

PROJECT OBJECTIVE #1

KEY ACTIVITY A.

Period	Activities	Products/Results	Person(s) Responsible	Notes
	✓			

KEY ACTIVITY B.

	✓			
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KEY ACTIVITY C.

	✓			
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PROJECT OBJECTIVE #2

KEY ACTIVITY A.

Period	Activities	Products/Results	Person(s) Responsible	Notes
	✓			

KEY ACTIVITY B.

	✓			
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KEY ACTIVITY C.

	✓			
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