Annual work plans bring strategy to life, and are a valuable management tool:
There are few management issues more important to the daily life of an organization than how it plans, executes and monitors its work, and these can all be guided by one overarching annual work plan. Work plans are the critical bridge between strategy and impact on the ground – a guide for making things happen.

Why Annual Work Plans Matter:
A strong overarching annual work plan gives an entire organization a framework for achieving impact and results – going beyond activities and task lists and serves as a key tool for management to track progress. Done well, it provides focus and clarity to an organization’s work, identifies resourcing gaps, and helps to integrate different teams’ efforts. It helps answer fundamental questions such as: “How are we doing? Are we making progress? Where are we succeeding and where are we behind?”

Effective Annual Work Plans Provide Organizations with:
- A tool to translate strategic plans into yearly action;
- A big-picture view of what they are trying to achieve in their work, and a focus on impact and results rather than only on activities and tasks;
- A framework that prioritizes the allocation of time and resources and identifies key funding gaps;
- A tool for unifying a team around a clear set of goals and targets;
- A system to track, measure, evaluate progress and change course as needed;
- A framework for tracking internal performance and holding a team accountable for delivery;
- A tool to help boards review and monitor an organization’s priorities and annual allocation of resources.

Tips for Effective Annual Work Planning:

**Simplicity is key** - Annual organizational work plans should focus on higher-level goals, the key actions required to implement those, and indicators of delivery. More detailed activities can fall into program and individual work plans.

**Think about which software will work best** – Many organizations use Excel but some find that project management software, such as Zoho or Trello, is more helpful for more detailed plans.

**One size doesn’t fit all** – Customize your work planning framework so that it works for your organizational needs.

**Start early** – Don’t wait for the year to begin to start developing your annual plan. September or October is usually a good time to start developing a work plan for the year ahead.

**Don’t just focus on programmatic activities** - Include important internal organizational targets such as staff development.

**Make sure your annual work plan is aligned with your annual budget** – The budget is the financial management tool for implementing your work plan. The work plan should guide how the organization allocates its resources.

**Use it and review it** – Don’t just create the plan and let it sit on a shelf. Print it out, hang it on your wall, and review it at least quarterly with your team to make sure your work and efforts are collectively moving you closer to your goals and targets.

“Honeyguide used to have individual work plans for each donor project. Now we have an overarching annual work plan that aligns our strategic goals with annual targets and milestones. This has given us much clearer guidance about what we need to achieve each year to advance our mission and, as a result, we are more results focused.”

—Sam Shaba, Program Manager, Honeyguide
A simple color-coding system can be used to track progress on a monthly or quarterly basis (e.g., the traffic light system which highlights in green / yellow / red whether an activity is on track or not). Notes can help explain challenges being faced or other reasons for delays; they also provide a useful reference looking back across the year.

The graphic below provides an illustrated example of our template for annual organization-wide work planning. You can access the template, which can then be downloaded and tailored to your organization’s needs.

### Different Types of Work Plans – how they fit together

An organization may have program and individual work plans in addition to an annual organizational one. These should all flow from the strategic plan, and while an annual work plan will look and function differently than individual or program level work plans, all three should align.

1. **Organizational annual work plan:**
   - The organizational annual work plan provides a clear framework for accountability and focus across an organization, including for the ED or CEO to the board. An annual work plan can provide the basis for regular reporting to the board and be used to quickly identify areas where an organization’s performance is lagging.

2. **Program or project work plans:**
   - It is helpful for an organization to have a more detailed overview of all activities planned by a specific program in one year so that senior management can track and evaluate each program’s performance. Programmatic plans also help ensure effective time management and use of resources (such as staff and vehicles). A good program plan ensures there is clarity about responsibility and time-frames.

3. **Individual work plans:**
   - Individual work plans help staff and their line managers identify clear targets and actions and assists with performance review and development needs. These plans should flow out of higher-level work plans.

<table>
<thead>
<tr>
<th>Column A: Goals</th>
<th>Column C: Key Tasks</th>
<th>Column F: Lead</th>
<th>Column H: Annual Targets</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1. Strengthen community land tenure in six target villages.</td>
<td>#1. Facilitate participatory land use planning, boundary demarcation, and development of village by-laws in six villages</td>
<td>Complete</td>
<td>Q2-Q3</td>
<td>* Digital LUP in place in 6 villages</td>
</tr>
<tr>
<td>#2. Carry out six training workshops with Village Councils and Land Government.</td>
<td>#2. Established clear procedures for implementation and enforcement of village by-laws and land use rules, resulting in enforcement of grazing and other land use zones.</td>
<td>Delayed</td>
<td>October</td>
<td>* US$40,000</td>
</tr>
<tr>
<td>#2. Increase community revenue from tourism joint ventures</td>
<td>#2. Facilitate joint venture agreements for construction of ecotourism in Kruger conservancy.</td>
<td>In progress</td>
<td>Q1</td>
<td>* Enki conservancy receives US$25,000 in base revenue</td>
</tr>
<tr>
<td>#2. Establish partnership with Conservation Business Advisors to provide customized training to field staff on joint venture negotiation and contract structure.</td>
<td>#2. Boundary conflict resolved so conservancies can enter into contracts with investors.</td>
<td>Slight delay</td>
<td>Q2</td>
<td>* Outsourcing and on-site conservationists each receive at least $5000 in conservation revenue</td>
</tr>
</tbody>
</table>

Download this template, go to [www.maliasili.org/tips-and-tools](http://www.maliasili.org/tips-and-tools), under “creating effective annual work plans”, click download. Or download via dropbox [here](http://www.maliasili.org/tips-and-tools).