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

MEASURABLE
Achievement or progress can be measured

ACHIEVABLE
Objective is accepted by those responsible for achieving it

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

TIMED
Time period for achievement is clearly stated

Made for PowerPoint 24point
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..........................
### OUTCOME #2 WORKPLAN

<table>
<thead>
<tr>
<th>Activity</th>
<th>Inputs</th>
<th>Time Frame</th>
<th>Responsible Person</th>
<th>Anticipated Outputs</th>
<th>Progress Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obtain topical fluoride and associated supplies.</td>
<td>Dental Clinic Coordinator money for supplies</td>
<td>11/07</td>
<td>Joe Smith</td>
<td>Supplies obtained</td>
<td></td>
</tr>
<tr>
<td>Recruit and hire dental hygienist</td>
<td>Community Health Director</td>
<td>11/07</td>
<td>Joe Smith</td>
<td>Hygienist hired</td>
<td></td>
</tr>
<tr>
<td>Dentist trains pediatrician and nurse practitioner(pilot clinical team)</td>
<td>dentists, pediatrician, nurse practitioner</td>
<td>12/07</td>
<td>Joe Smith</td>
<td>Dentist and nurse practitioner trained</td>
<td></td>
</tr>
<tr>
<td>Pilot clinical team provides topical fluoride applications during well-child visits</td>
<td>pilot clinical team</td>
<td>1/08-4/08</td>
<td>Joe Smith</td>
<td>30 children per week receive topical fluoride applications from pilot clinical team</td>
<td></td>
</tr>
<tr>
<td>Hygienist coordinates evaluation of the project and works with pilot clinical team and pilot oversight team to identify any issues of pilot implementation</td>
<td>hygienist, pilot clinical team, pilot oversight team</td>
<td>1/08-4/08</td>
<td>Joe Smith</td>
<td>5 meetings held and evaluation data collected.</td>
<td></td>
</tr>
<tr>
<td>Hygienist works with medical providers and pilot clinical team to improve implementation process</td>
<td>hygienist, pilot clinical team</td>
<td>01/08-04/08</td>
<td>Joe Smith</td>
<td>Implementation process improved.</td>
<td></td>
</tr>
<tr>
<td>Dentist trains additional clinical teams</td>
<td>hygienist, pilot clinical teams</td>
<td>05/08-06/09</td>
<td>Joe Smith</td>
<td>3 clinical teams trained</td>
<td></td>
</tr>
<tr>
<td>Hygienist provides on-going consultation and support to clinical teams</td>
<td>hygienist</td>
<td>05/08-06/09</td>
<td>Joe Smith</td>
<td>Support provided to clinical teams as needed</td>
<td></td>
</tr>
</tbody>
</table>
## OUTCOME #2 EVALUATION PLAN

<table>
<thead>
<tr>
<th>Outcome #2: Outcome Indicator(s)</th>
<th>Data Collection Method and Timeframe</th>
<th>Evaluation Results (Complete for Progress Report Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td># of children receiving topical fluoride applications</td>
<td>Project Records</td>
<td></td>
</tr>
</tbody>
</table>

**THEY CAN BE SHORT OR VERY LONG!**
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