

Work Plan Development Tips & Tricks

A work plan is an outline of a set of goals and processes by which a team and/or person can accomplish those goals, offering the reader a better understanding of the scope of the project. Work plans, whether used in professional or academic life, help you stay organized while working on projects. Through work plans, you break down a process into small, achievable tasks and identify the things you want to accomplish.

1. **Identify the purpose for your work plan.** Work plans are written for various reasons.

Determine the purpose up front so you can prepare properly. Keep in mind that most work plans are for a certain period of time (i.e., 6 months or 1 year).

2. **Determine your goal(s) and objectives.** Goals and objectives are related in that they both point to things you hope to accomplish through your work plan. However, remember the differences, too; goals are general and objectives are more specific.

- Goals should focus on the big picture of your project. List the desired ultimate outcome of your work plan. Keep it broad.
- Objectives should be specific and tangible. In other words, you should be able to check these off your list when you accomplish them.
- Objectives are generally written in the active voice and use action verbs with specific meanings (e.g. "plan," "write," "increase," and "measure") instead of verbs with vaguer meanings (e.g. "examine," "understand," "know," etc.).

3. **Consider ordering your work plan by "SMART" objectives.** SMART is an acronym used by individuals searching for more tangible, actionable outcomes in work plans.

- **Specific.** *What exactly are we going to do for whom?* Lay out what population you are going to serve and any specific actions you will use to help that population.

- **Measurable.** *Is it quantifiable and can we measure it? Can you count the results? Did you structure the work plan so that "health in South Africa would increase in 2020?" or did you structure it so that "cases of HIV/AIDS in newborn South African babies would decrease 20% by 2020?"*
- **Achievable.** *Can we get it done in the time allotted with the resources we have available? The objective needs to be realistic given the constraints.*
- **Relevant.** *Will this objective have an effect on the desired goal or strategy? Although it's probably important for overall health, does measuring the height and weight of high-schoolers *directly* lead to change in mental health procedures? Make sure your objectives and methods have a clear, intuitive relationship.*
- **Time bound.** *When will this objective be accomplished, and/or when will we know we are done? Specify a hard end date.*

4. **List your resources.** Include anything that will be necessary for you to achieve your goals and objectives. Resources will vary, depending on the purpose of your work plan.

5. **Identify any constraints.** Constraints are obstacles that may get in the way of achieving your goals and objectives.

6. **Who is accountable?** Accountability is essential for a good plan. Identify who is completing each task. There can be a team of people working on a task but one person has to be accountable for the task being completed on time.

7. **Write your strategy.** Look over your work plan and decide how you will use your resources and overcome your constraints in order to reach your goals and objectives.

- List specific action steps. Identify what needs to happen each day or week for you to complete your objectives. Also list steps other people on your team will need to take. Consider using project management software or a personal calendar to keep this information organized.
- Create a schedule. Though you can create a tentative work schedule, realize that unexpected things happen and you need to build space into your schedule to prevent falling behind.