

Coalition Workplans

Many organizations use employee workplans and workplan development processes to establish and document employee/team expectations for a year (or other period of time). How coalitions use workplans and workplanning processes varies widely. This document is intended to provide a basic outline of the workplanning process, a sense of how coalitions are currently using workplans, and some sample workplan templates for future use.

While workplans are often used to guide individual and team workflow and outputs over a specific time period, they are also useful in helping to document expectations and goals. Coalitions with multiple projects and/or grants may find using workplans especially useful.

Using a process (workplanning or other) to guide staff and team outputs and deadlines can help ensure that products are created and distributed in a timely manner throughout the year. Staging product development, event hosting/coordination, and other coalition products can help ensure that products are available throughout the year and that timelines across projects are coordinated in way that allows for the most efficient use of staff time, resources, and coalition energy.

Setting expectations and bringing clarity to the year's work will set employees up for success and provide managers with a guide for how to evaluate employees' performance. Setting clear expectations for employees is the cornerstone of employee management and evaluation. Without clear expectations, there is no yardstick by which we can measure, support, evaluate, or critique employees' performance.

Developing workplans will help staff across the entire coalition better coordinate their work and use the coalition's resources efficiently. For example, many coalitions host several events throughout any given contract year. Because events require intensive planning, it would be a difficult challenge for a coalition with only a few staff members to try to host several events in the last quarter (or even month) of the year. Instead, it makes the most sense for coalitions to stagger events over the course of the contract period, leaving plenty of room in between events for all of the steps involved in event planning to be accomplished in a timely and non-stressful manner.

HOW TO PLAN

Before beginning to craft individual or group workplans, all staff should keep the coalition's mission, values, and goals in the forefront of their minds. All individual and team responsibilities should be in pursuit with the organization's mission and goals and should be completed in line with the organization's values and philosophy. Every workplan should be firmly rooted in the coalition's foundational documents. While the Board of Directors and Executive Director are responsible for overall organizational planning (with input from staff and stakeholders), staff and internal coalition teams are responsible for assembling workplans in pursuit of the agency's overall goals. These different plans should align in a way that helps prepare all staff to meet the coalition's goals in a meaningful, thoughtful manner.

Anticipated goals and outcomes

Keeping in mind the organization's overall mission, values, and goals, teams or individuals can initiate workplan development by setting specific outcomes or goals for activities within their influence. Questions to ponder:

- What outcome(s) do you (or does your team) hope to accomplish this year?
- If you are successful, what will that look like and how will you know?
- What change do you want to make possible in the field? What impact do you hope to have?
- What are the anticipated indicators of your success?
- How do your anticipated goals and outcomes fuel your coalition's mission and vision?

Assemble your work

Working with your outcomes and goals in mind, think through what action steps need to be in place to move you towards those successes. What do you need to do to accomplish your goals? How will you get there?

In an ideal world, we all could be lucky enough to be able to determine our own action steps on our workplans without restrictions, but coalitions are often balancing the requirements of funding contracts and grants along the way. These prescriptive "to-do" items are important to acknowledge and incorporate early in the workplanning process.

At this point, it's time to outline everything that needs to be accomplished over the course of the year or other time period being planned for. Include wish list items, must-do items, contract deliverables, membership maintenance, potential crisis items, and ongoing work.

Step back from the list and assess which items fit into your goals and fuel your outcomes. If items on your list do not fuel your outcomes, then consider whether they are worth including in your workplan. If they are required items, consider why they are required and how they may fit your organization's broader mission or somehow support its growth. If there are required items that do not seem to fit one way or another, that's a point worth discussing with a supervisor.

What items have you determined are in line with your goals and outcomes? At this point, you should have roughly assembled a list of action items for your workplan.

Developing your timeline

Keep track of the action items that fuel your outcomes and goals and begin to prioritize and put them in a sequence. Be sure to pay attention to the length of time you'll need to spend on the smaller tasks to accomplish the bigger action items (e.g. if you need to host a committee meeting to pick a Sexual Assault Awareness Month theme before you order materials from the printer, you'll need to make sure to build in plenty of time to arrange for the committee meeting).

Timelines can be tricky to establish, since it's hard to say from the outset exactly how much time each activity will take. To make sure you don't run out of time, it's especially useful to budget in extra time for each task so you won't be too far off schedule if things don't go as planned.

Many of your activities might have established timelines, either from supervisors or from grant sources. In either case, these established timelines are not likely to be moved, so it's very important to create earlier deadlines (maybe as far as two weeks or a month earlier) to make sure your workplan is padded with extra time to account for any potential mishaps.

Identify Necessary Resources

Likely, no one expects you to work in a vacuum. Inside your coalition or outside with agency partners, you likely work - at least on some level - with a team. Once you have a rough idea of what will be included on your workplan and what your timelines need to be, consult with your teammates and partners to see if they are on board with your plan and, if they have important roles to play, if they can meet your timelines or if they need to be adjusted.

Similarly, it's likely that you'll need some coalition resources in order to put your plan into action. Whether you need funds from the budget, printing time at the copier, or office supplies, it's important to account for those in your plan and check to make sure you'll have access to these resources when the time comes. Do you need to check with supervisors to make sure your resources will be accessible? Are there office colleagues who are responsible for making sure you can have access to what you need?

Reality Test

Once you've established your action steps, timelines, teams, and needed resources, it's time to step back and see if you have the makings of a realistic plan. At this point, it would probably be helpful to go over a draft of your workplan with your supervisor, team mates, or other colleagues.

Some key questions to ask:

- Is everything you are responsible for on your workplan? What is missing?
- Have you established realistic and manageable timelines?

- Where do timelines/projects/action steps overlap. Is that manageable?
- What other significant events (internal to the coalition or external) coincide with your timelines? Will those events impact you in any way?
- How does your plan work for your teammates? What needs to change?
- Do any of your action steps include important sub-steps that you need to include on your plan? Have you included enough detail to be useful?
- Do your action steps help you achieve your desired outcomes? Do you think this plan will help you progress throughout the year?
- Are there professional development opportunities you would like to pursue to help you accomplish your professional goals for the year?

Once you have answered these questions, perhaps with your supervisor, adjust your plan accordingly and begin to determine ways to hold yourself accountable to following the plan.

Holding Yourself Accountable

Workplans are only useful if you use them, hold yourself accountable to them, and adjust them as necessary. It's important that workplans be flexible enough to be adapted when things don't go as planned, but it's equally important that they help guide you to keep you moving forward so that you meet your anticipated outcomes and goals for the year.

You can hold yourself accountable through your workplan process in a number of different ways, depending on what your coalition's internal accountability mechanisms are. For example, you and your supervisor may determine that you should report weekly, bi-weekly, or monthly on your progress.

If you aren't required to report your progress frequently, it may be useful for you to proactively report back: even if your supervisor only requires a quarterly report from you, it might be useful for you to report back every two weeks so you can hold yourself accountable for progress in the in-between times. Similarly, you might choose to share your workplan with other staff members so they can help support you in making progress along the way.

Most importantly, it's important to build an accountability mechanism into your workplan that works for you. You may even decide to give yourself little rewards along the way to celebrate your accomplishments. A little bit of chocolate can go a long way towards helping you persevere at the end of a long day.

SAMPLE WORKPLAN FORMATS

Employee workplan formats vary depending on a number of factors, including the employee or supervisor's personal preference. Workplan formats can vary widely across organizations, and sometimes the formats will vary widely inside each coalition.

Because each individual job has different responsibilities, it's important to select a workplan format that best matches the flow of that job. Some jobs might be more detailed oriented and would lend themselves to a workplan that's in a month-by-month calendar format (e.g. a fairly predictable administrative job) while other jobs with more flexibility might lend themselves to a logic model.

It's also important to find workplan formats that work for a variety of individual learning styles. After all, a workplan is supposed to be useful to employees and supervisors - and it might require some creativity to come up with a format that works for everyone. In the meantime, we hope these sample formats provide you with some food for thought.

Sample Annual Workplan Task Grid

Milestone/ Task	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec
Newsletter	X			X			X			X		
Volunteer training	X								X			
Reports Due	X			X			X			X		
Holiday Auction											X	
Summer fundraiser								X				
Update contacts						X						
Write grants		X	X									
Negotiate contracts				X	X							
Annual conference					X							
Annual Review								X				
Clean up files!								X				

Sample Monthly Workplan

April	1 Write newsletter	2 NL Vol training	3 NL	4 NL Vol training	5 NL Follow up calls	6 Car wash fundraiser
7	8 NL to printer	9 Vol training	10 Staff meeting	11 Vol training	12 Print addresses	13
14	15 NL to bulk mail	16 Vol training	17 Staff meeting	18 Vol training	19	20
21	22	23 Make calls about spring break coverage	24 Finish on-call calendar for May	25	26	27
28	29 Board of Directors call	30				

Goals	Objectives	Deadline	Partners	Resources Needed
Revise Personnel Policies		12/20XX	Board of Directors, personnel committee	HR atty
	Clean up recent legal changes, with atty review		Staff	Staff time
	Facilitate staff input			Cost of copies of new handbook
Hire new program director		9/20XX	ED	Cost of advertising
	Revise job description		Program manager	Staff time
	Post announcement			
	Review resumes			
	Interview applicants			
	Check references			
	Make offer			

Logic Models

Some coalitions choose to use logic models as a format for their workplans. A logic model outlines the outcomes and impacts that any program, project, or activity is intended to produce. Logic models usually include four components: inputs, activities, outputs and outcomes. More information on logic models can be found in the Kellogg Foundation's Logic Model Development Handbook here: www.wwkf.org.

A sample coalition logic model could look like this:

Activity: Provide responsive technical assistance

4. Strategy/ Plan	3. Resources (human, financial, org, community)	5. Staff/ Team	6. Timeframe & Due Date	2. Outputs (size/scope of services/ products)	1. Outcomes (desired change, progress)	7. Measurement (data source, collection, and analysis)
Reach out to executive directors and follow up with requests	Phone/email; opportunities for relationship building	Tara	Once a month; on-going	Determined by need/request, including custom infrastructure and capacity building products	Increased organizational capacity and sustainability; enhanced coalition statewide leadership	Recipient feedback/ evaluation form; RSP Partners feedback
Reach out to sexual assault program managers and follow up with requests	Phone/email; opportunities for relationship building	Tara	Once a month; on-going	Determined by need/request, including custom infrastructure and capacity building products	Increased organizational capacity and sustainability; enhanced coalition statewide leadership	Recipient feedback/ evaluation form; RSP Partners feedback
Respond to requests for assistance, products, and trainings	Phone/email; internet; RSP Partners; other national TA providers	Tara	Upon request	Determined by need/request, including custom infrastructure and capacity building products	Increased organizational capacity and sustainability; enhanced coalition statewide leadership	Recipient feedback/ evaluation form; RSP Partners feedback

Thank you, Washington Coalition of Sexual Assault Programs, for sharing.

Training and Technical Assistance Team Workplan January to March + April to June

Objective or Activity	Grant/ Cite
GEAP	GEAP; Month/ Year
<input checked="" type="checkbox"/> Attend monthly GEAP staff meeting; attend quarterly GEAP partners meetings	No cost ext to DATE
<input checked="" type="checkbox"/> Promote access to Protective Orders for all domestic violence victims, including victims of sexual assault in the context of domestic violence, and enforcement of the conditions of all Protective Orders through work with the GEAP partner community task forces on issues that have been identified as barriers to access or enforcement of Protective Orders	
<input checked="" type="checkbox"/> Conduct the Virginia Statewide Community Collaboration Conference Work to improve the reporting, investigation and documentation of domestic violence, including sexual assault in the context of domestic violence.	
Outcomes for the Quarter:	Jan-June 10
<ol style="list-style-type: none"> 1. Participate in the development of a GEAP application for the next grant cycle, coordinating with the Co-Directors. 2. Share the final draft of the OCME fatality review statewide recommendations with the Co-Directors for final feedback. 3. Coordinate with GEAP partners to complete the distribution of the Protective Order DVD. 4. Coordinate with GEAP partners to develop a plan to promote the use of the Protective Order DVD by attending state meetings and conferences of J&DR court professionals, demonstrating how the DVD might be used with CCRs and through other creative means. 5. Continue to participate in Partnership activities throughout both quarters. 	
Team Plan for the Quarter (Who/What/When):	Jan-Mar 10
Who	What
Report on Activities for each Quarter:	Jan-Mar 10 April to June 10
<ol style="list-style-type: none"> 1. Was a new GEAP application submitted? 2. OCME report finalized? Did we provide input? 3. Number of DVDs distributed, to whom, and on what dates: 4. Plan for promoting the DVD, including wonderfully creative ideas: 5. What else was the Partnership up to this quarter? 6. Other: 	

Thank you to the Virginia Sexual and Domestic Violence Action Alliance for sharing.

Survey Data from Coalitions

Please take a look at the survey data below to see how coalitions use workplans, what online tools they find most helpful, and how coalitions use employee performance improvement plans.

1. Does your coalition use employee work plans?
42.3% YES
42.3% NO
15.4% SOMETIMES

2. If your coalition uses written employee work plans, what format do you use? Or does the format vary, depending on the employee/supervisor?
 - Many coalitions reported that their work plan formats vary, depending on the employee:
 - ✓ The format varies depending on employee even though it follows some general guidelines. (for example - specific objectives relate to overarching goals, how work address accessibility and cultural competency issues, etc). Use separate activities/timelines for individual projects.
 - ✓ They're individual, based on the annual operating plan.
 - ✓ The format we use depends on the employee and the need for the work plan. We primarily use it for the employees who have time management issues and are unable to properly detail the activities that are being performed. We have modified the one format a couple of times trying to find one that works best.
 - ✓ Reg. landscape word document based on the Coalitions grant objectives. Report out on/of Outcomes and Activities per quarter

 - We don't use a form. On a weekly basis, we list our schedule for each day and then this what projects/activities we'll be working on. Then at the end of the week we submit the same plan with updates. Annually as part of their evaluations we identify the major projects and activities. We have a color-coded master chart of projects that we update at staff meetings. With newer staff and/or those that need more supervision, the work plan is written with the director. But all staff view everyone's work plans and updates each week on the staff listserv.

 - For yearly goals and objectives for employees, we use a simple one pager for 1) professional development 2) program management 3) performance. Under each of these areas specific achievements or deliverables are listed with a time frame for the year. This provides basis for year-end performance assessment along with job description. It is a negotiated document between employee and their immediate supervisor. ED signs off on all of them as well.

 - It varies depending on the team and the level of specificity needed by a particular employee. Some teams only use a work plan if staff has expressed a need for more structure or if their supervisor has determined they cannot prioritize or stay on task. Others may use them to determine their work load and priorities on a regular basis, i.e. our graphic designer.

 - We don't have an actual form to follow but the format we use is based on the goals and objectives associated with the grants funding the position, as well as any staff identified goals for program improvement and any performance related goals identified by staff or supervisor. Our plans are developed by employee and supervisor together (or Board Executive Committee for ED).

3. If your coalition doesn't use written work plans, how do you support staff in planning their work flow?
- Staff meetings -- usually taking a look at our grant goals/objectives and talking about what has to be done (or progress, etc.) for that quarter and preparing or anticipating project needs for whole grant period.
 - individual and group discussion according to project; basically work plans but they're not written down
 - Workflow? Our agency has a poor sense of workflow, and a good sense of "get it done." Workflow is irregular and funding / project based.
 - We are moving toward using work plans. There are only 2 of us so it's more informal.
 - at this point, on a small island setting, we remain connected and meet constantly as we build our capacity
 - regular individual, team and staff meetings. I am interested in work plans around projects that funnel down to individual employee work plans - we just have not found the time. Have a loose plan, just haven't done much yet to implement.
 - set goals during each annual performance review. check in on goals and projects through regular supervision meetings
 - staff that don't use formal work plans are required to report monthly all their work accomplishments and what tasks they are spending their time on.
 - Daily and weekly discussion, but we do need to get something in writing to help focus our energies.
 - We try to meet individually with them to check on progress, plan activities, etc.
 - We operate in a crisis mode for the most part.
 - Grant objectives/timelines, staff meetings, flowcharts for projects
4. Does your coalition use any electronic or web-based employee work planning tools? If so, please describe.
- Not for workplans. We use google docs for any shared work products, which would be something to consider in the future.
 - just our listserv.
 - Employees create logic models for overall program areas (prevention, intervention, advocacy, fund development, volunteers, etc). Then, for each major initiative in these overall program areas and operational plan is used -- objectives, activities, and timelines. These are checked throughout the year. We have our own forms, not web-based, but all forms are created and saved electronically.
 - We started using Google Calendar for coordinating training and presentation schedules, and are looking into Basecamp but haven't implemented it for the agency yet.
 - use shared documents to compile ideas and information when working on joint projects (great for brainstorming and recording).
 - Through the use of our staff shared calendar employees put the activities or events attending on the calendar for all to see. We also use a template that we located from Microsoft templates for the purpose of tracking information on a timeline like a daily planner as a plan then the report is created at the end of each week and reviewed with the supervisor.
5. Does your coalition use written employee performance improvement plans?
- 54% YES
 - 19% NO
 - 19% SOMETIMES
 - 8% I DON'T KNOW

6. If so, what does these look like and how are they used?
- They happen during annual reviews (which rarely happen annually) and it is rare for there to be any follow-up.
 - bi-weekly meetings
 - 3 month / 6 month / and 1 year evals for new employees. Yearly after that. They are done by both the employee and supervisor and followed with a dialogue.
 - First, the employee must do a self-evaluation that is then provided to their supervisor. The self-evaluation also has space to provide feedback on your supervisor and how they can better support you. Then, every fiscal year staff has a performance evaluation meeting with their supervisor. The plan will state how the employee can improve and what future goals are for that employee (usually comes from the self-evaluation). This is a pretty positive experience BUT I am aware that "competence" is defined by the person in power to rate it and to determine what level of it you possess.
 - Conducted twice a year just a general review tool to identify areas of improvement.
 - they're on a form and done with the director. Purpose: accountability and documentation
 - See #2. At end of year assessment is made on "performance" and/or professional development needs. These are then translated into objectives for the employee in their annual plan (see #2). The plan holds the Coalition accountable for allowing time and resources (money, transportation) for employee to achieve these goals through training, workshops, and/or the like.
 - It varies by teams but they are used as a result of a poor performance evaluation
 - They vary depending on the situation. A performance improvement plan is used to clearly specify what changes need to take place to improve the employee's job performance.
 - pips only used when an employee is under performing. has only been used a couple of times
 - Narrative with targets for performance changes and timelines by which to achieve them.
 - Incorporated to annual work plan as needed.
 - Also individualized, based on the job description and operating plan objectives for that staff person.
 - we are committed to doing this.
 - 3, 6 month for new employees and annual for everyone. are parts for supervisor and employee to complete, discuss and then finalize together. Discusses goals, challenges, successes, future interests, professional development
 - They look like what you expect from an annual review (self-evaluation and supervisor evaluation, followed by reconciling the two evaluations).
 - yes, they are annual narrative evaluations.
 - It's a template we purchased from HR resources.
 - The performance evaluations are used for the six month probationary period and for the annual performance evaluation. If there are any areas that are marked Needs Improvement and methods of improvement are provided it is documented and referred to during the next scheduled evaluation or the set period of time provided for improvement.

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