



Elements of Work Planning

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Vision:

Defines the challenge at hand and the purpose and meaning of the entire plan:

- *What is the need or problem? Or, what is possible?*
- *How do you know? (Research and data?)*
- *How does addressing it align with achieving your organization's strategic goals?*

Resources:

What do you need to have or develop before the action can occur? Be specific and consider:

- **People, training, and supplies/equipment**
 - *Who are the right people? How will you assess their development needs? Who will provide the training? Do you need permission for purchases or contracting?*
- **Money, time, and space**
 - *How much? By when? Where will you get it?*

Action:

What activities need to happen? Add how many, with whom, and when, but resist the temptation to describe how they will happen.

- **Seminars/events:** *education, recruitment, fundraising, or professional development*
- **Meetings, conferences, and networking:** *internal (policy, awareness) and external*
- **Campaigns and partnership development**

Yield:

Quantifiable results of the action, also known as "outputs," answering:

- *How many...? What percentage...? Or, how much...?*
- *What are **the baseline numbers from the effort?***

Initial Impact:

Short-term results that answer what is different, often appearing as changes in:

- *Knowledge, skills, or abilities*
- *Attitude, behavior, or decision-making*
- *The most visible manifestations of the problem*

Sustained Outcome:

Longer-term, lasting results that follow more immediate and tangible changes; these impacts often address deeper roots of the challenge at hand, and:

- *reveal changes in condition: economic, physical, social, or political*
- *Create or significantly alter models of doing business*
- *Demonstrate the return on investment in volunteer engagement to all stakeholders*



Performance Measurement Tools

Indicators:

Specific, measurable, observable characteristics or changes that represent the achievement of an initial impact or sustained outcome. This is how you know if you're there... or at least getting there!

Work Plan:

A simple chart to lay out each element, so that:

- Colleagues working on disparate pieces understand how each contributes to the system
- The process is transparent
- Multiple people can "logic check" the plan

Progress Report:

A view of the work plan and indicators with a blank column for recording progress, that:

- Allows you to set dates for accomplishments
- Communicates progress or problems for early intervention
- Tracks accomplishments for replication or building future plans