

# straight to the POINT

## Workplanning

Taking into consideration implementers' limited time and resources, the tools in Pathfinder International's *Straight to the Point* Series provide clear, concise guidance on a variety of issues related to program design, implementation, and evaluation.



### What Is a Workplan?

**A workplan is the visual map of how you will implement your project.**

It includes all activities, the time and duration of each activity, and the people who are responsible for each activity. Workplanning is a systematic effort to identify the activities and resources needed to accomplish a task or project.

A workplan breaks large tasks into smaller, more manageable pieces and assigns a person to be responsible for each piece.

A workplan includes a schedule and the order in which tasks have to be accomplished. This ensures that activities are spaced realistically to avoid problems with staying on schedule. Workplanning can seem like a lot of effort, but it is critical to the success of a project and is actually very easy!

### Why Is a Workplan Important?

**For your project to succeed, you need to think very specifically about *how* you will implement your project, and *what* your project will seek to achieve.** You must understand your environment, your available resources, potential partners and supporters, timing, and potential challenges. After identifying concrete goals and objectives, you will choose the activities that you will carry out to make your goals and objectives a reality.

**Simply choosing goals, objectives, and activities isn't enough. You need to think about *why* each activity is important and *how* and *when* you will carry out each one.**

**In addition to helping you define your project's goals, objectives, and activities, a workplan is a tool to help you monitor your project.** As you implement your project, you should return often to your original plan and discuss it with your colleagues. In these regular discussions, you will assess your progress, identify problems, brainstorm solutions, make changes to your plans, and identify areas where innovation is needed. Here, innovation means finding new, more effective ways to implement programs based on lessons learned from the program experience.

### How to Use This Tool

This tool leads you through the process of developing a workplan and will help you to think concretely about what you need to do to accomplish your project's goal. This tool should be completed in a workshop setting by a group of people from your organization who will implement the project. Additional sheets of paper, a flipchart, or a computer may be helpful for making notes and recording your answers.

The six steps below break down your project into smaller, more manageable tasks, which will help you decide exactly what to do, when to do it, and who should be responsible. Step 5 brings all the previous steps together to help you create the workplan and Step 6 gives guidance on monitoring your workplan.

## STEP 1: Set Your Goal

Determining your overall project goal is the first step. A goal is the end result you are hoping to achieve. Make sure the goal is reasonable and achievable, taking into consideration your constraints (time, money, human resources, etc.). Do not choose an overly large, vague goal—be realistic and specific.

Your goal should be specific enough for you to achieve it, but broad enough to encompass the purpose of your program. You can start by thinking of the larger issue or problem you want to address. For example, your larger aim may be: *decrease mother-to-child transmission of HIV*. However, this is very broad, so you need to think more specifically. One way to decrease mother-to-child transmission is by increasing prevention of mother-to-child transmission (PMTCT) service use.

**Example goal:** *Increase use of PMTCT services by pregnant women with HIV in our district.*

### GOAL

What is your goal?

## STEP 2: Set Your Objectives

Your goal should be broken down into a few objectives that will *directly* contribute to achieving your goal. Objectives are the smaller steps you must complete in order to reach your overall goal. They should be clear and focused. They should be limited in number (no more than three). **Note:** If your objective is likely to take longer to achieve than your goal, it is not a good objective.

If your goal is to increase PMTCT service use by pregnant women with HIV, an objective might be to make the services more convenient for young women (e.g., offer services at times when these women are available, offer the services in more clinics, ensure a stigma-free environment at the clinics).

**Example objective:** *Make PMTCT services more convenient for young women.*

### OBJECTIVES

What are your objectives?

Objective 1

Objective 2

Objective 3

# STEP 3: Identify Activities and Timing

**ACTIVITIES:** For each objective, think of the concrete activities you need to carry out to meet the objective. Your activities should be designed to help you achieve your individual objectives, moving you toward your goal. *You cannot—and should not—do everything.\** Think about your expertise, capacity, available funds, and what will have the greatest impact on your objectives. So, if your objective is to “make PMTCT services convenient for young women,” think about what specific things you could *do* to make that happen.

**Example activities:**

- Research when clinics are currently offering services and when young women want services to be offered
- Hold meetings with clinic staff to discuss offering PMTCT services at additional times
- Conduct a sensitization workshop with clinic staff to address stigma and negative provider attitudes

It is important that your activities are **concrete** and very **specific**. Ideas like “help women use services” or “make clinics more available” or “improve services” don’t provide any focus or guidance on what to do next. With this in mind, choose up to five activities that you will carry out to meet each objective.

**Note:** Each of these activities probably contains multiple tasks. (For example, to conduct a sensitization workshop with providers, you need to develop a curriculum, prepare handouts for participants, rent a venue for the event, and so on.) It may help you to make a highly detailed workplan that includes all the smaller tasks involved in each activity. (The template provided on page 6 does not include that level of detail.)

## OBJECTIVE 1

| ACTIVITIES |  |
|------------|--|
| 1          |  |
| 2          |  |
| 3          |  |
| 4          |  |
| 5          |  |

*\* Your workplan and budget are closely related. Remember to consider your financial resources as you plan each activity. See Pathfinder International’s Straight to the Point: Budgeting Basics for more guidance.*

## STEP 3: Identify Activities and Timing *(continued)*

### OBJECTIVE 2

#### ACTIVITIES

|   |  |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

### OBJECTIVE 3

#### ACTIVITIES

|   |  |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

**TIMING:** You can use a workplan to plan the order of activities, the time period in which to accomplish each activity, and the person or people who are responsible. This not only helps create a realistic plan to get the activities done, but it also helps people meet their commitments.

For each activity, you will have to determine the approximate timing. Timing will depend on each activity's priority. *Do not try to do everything at the same time.* Think about the cost of the activity and the person/organization primarily responsible for leading it, as well as which activities may be dependent on the completion of other, earlier, activities. You will decide on the specific timing in Step 5 when you make your workplan.

## STEP 4: Identify Partners

Often, collaborating with other groups/organizations/health facilities/etc. will help you implement your project more successfully. You need to identify partners who will bring helpful, unique skills and contributions to your effort. Identify several potential partners and what they can contribute to your project. Include your own organization and its resources in the list.

| POTENTIAL PARTNER | CONTRIBUTIONS (human resources, funding, technical expertise, space for activities, etc.) |
|-------------------|-------------------------------------------------------------------------------------------|
|                   |                                                                                           |
|                   |                                                                                           |
|                   |                                                                                           |
|                   |                                                                                           |
|                   |                                                                                           |

**What resources are still needed?**

## STEP 5: Make Your Workplan

The final page contains a template you can use to develop your workplan. Copy the information on goals, objectives, and activities from Steps 1–3. (Write the activities in the numbered boxes under each objective.) Then assign people or groups to be responsible for each activity. (You can include potential partners that you identified in Step 4.) Use an “X” to indicate the month(s) in which each activity will be accomplished. If an activity is recurring (e.g., quarterly review meetings), place an “X” in the months the meetings will occur. If you want more detail, you can use weeks instead of months in your workplan.

## STEP 6: Monitor Your Workplan

A workplan can be used as a tool to track the status of activities. Use the “status” column on the far right of the template to mark activities as “complete,” “in process,” or “delayed.” At least once per month, review the workplan and activity status with your team. If an activity should have been completed in the past month and was not, discuss reasons for the delay. If the activity is still necessary to achieve your objective(s) and goal, come up with a plan to ensure that the activity will be completed within the next month. (You may have to increase time, staff, or financial resources devoted to the activity.) You may also need to adjust the timeline for other activities if they are dependent on completion of the delayed activity. Using your workplan to track progress ensures greater accountability among project staff and managers. Regular reviews of the activities and timeline reinforce the importance of each activity and the schedule set at the project’s start. These reviews also provide an opportunity to identify challenges and solutions before small problems become big problems.

# Workplan Template

| Goal:        |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
|--------------|-----------------------------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|----------------------------------------------|
| ACTIVITIES   | RESPONSIBLE<br>PERSON(S) OR GROUP | YEAR 1 |     |     |     |     |     |     |     |     |     |     |     | STATUS<br>(Complete,<br>In Process, Delayed) |
|              |                                   | JAN    | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |                                              |
| Objective 1: |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 1.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 2.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 3.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 4.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 5.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| Objective 2: |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 1.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 2.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 3.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 4.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 5.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| Objective 3: |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 1.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 2.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 3.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 4.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |
| 5.           |                                   |        |     |     |     |     |     |     |     |     |     |     |     |                                              |