Building Your First Work Plan
A Work Plan

List of itemized tasks
List of individual responsibilities
Includes a time element
Includes a deliverables/outcome element
Step One:

List every major objective

then

Add the individual steps that must be completed

Your first time, everything you do is a task
Step Two:

For every task ... List who is responsible:
  List by team
  List by person
Step Three:

For every task ... List the deliverable:
How do you know a task is completed?
Where does completed work go?
Step Four:

For every task ... List the amount of time required from start to finish
Common Time Measurements

- a day
- a week
- a month
- by quarter
- by year

the best measurement depends on the total project duration
Budgeting your Time

A short-term project:

A 40 hour week

5% = 2 hours
10% = 4 hours
20% = 8 hours
etc.
A year-long project:
40 hours per week × 50 weeks = 2000 hours

5% = 100 hours total (2 1/2 wk)
10% = 200 hours (5 weeks)
20% = 800 hours (20 weeks)

etc.
Time ??

What if I don’t know how long something should take?

How many dependents does it have?

How complex is it?

How many staff know about it?

Is it something that has been done before somewhere else?
Ways to Build a Work Plan

Simple Word Document
Excel Spreadsheet
Tree Chart
Network Logic Chart
Gantt Chart
Ways to Improve Your Work Plan

Color code types of work

Create modules

Identify dependencies

Decision-Making: By color coding types of work you can assign supervisory responsibility
Work Plan in Practice

All Project Responsibility: PM, PI, and Director

Administrative Tasks: Project Manager

Technical Tasks: Lead Programmer

Website Tasks: Web Developer

Content Tasks: PI

Financial Tasks: Business Manager
Work Plan Changes

You can’t control everything
You can’t control external factors
You can’t control personalities
Scope Change

- Requirement of project change
- Design element change
- Technology change
- Change in mission/business
- Change in skills
Baseline Change

- Project specifications
- Financial cost changes
- Resource changes
- Partner changes
- Changes in discipline/field
When is Change Needed?

When you aren’t meeting deliverables
When your team isn’t working well together
When you have new, or a change in, partners
When resources disappear
When funders or stakeholders request change
When your PI isn’t doing their job
When is Change Allowed?

When it doesn’t cost you:

additional money
additional time
additional deliverables

UNLESS
By Making the Change:

You deliver a better product
You can increase the impact
You are better positioned for the next phase of the project

HOWEVER
Scope Creep

When new partners come to the project
When PIs get excited
When projects get press
When your staff changes
Regular Scope Assessments

Does our current scope accomplish our primary goals?

Are the core stakeholders pleased?

Is the project team enjoying its work?
When a Project Becomes Painful

- Identify the quickest route to completion
- Remove all extraneous meetings/work
- Be upfront about what isn’t working in the work plan
Changing Project Scope

All team meeting to discuss changes and potential effects

Memorandum of change:
Update project work plan
Update project responsibilities

Notification of stakeholders
Common Errors in Work Plans

Too broad
Too specific (changes constantly)