



Targeted Initiative

Project Workplan Guidelines

Purpose and Use of a Project Workplan

The Project Workplan is a tool to help plan, manage implementation of, report on, and monitor the progress of a project.

There are many templates and formats now available for grant writers and project managers to use. The Endowment for Health offers a template and these related workplan guidelines to applicants, however we do not require that grantees utilize this specific template.

This Project Workplan has two parts:

1. long-term goal workplan tables for key steps that will be implemented to progress toward the goal, including key steps, inputs, timeframe, and responsible person (s).
2. measurement plan tables which outline how to measure progress toward each long-term goal, including specific indicators, targets and data collection methods.

The Project Workplan will help to:

- **plan** a project by outlining the key steps to be accomplished, timeframes, and inputs needed. The Project Workplan will also help to formulate the project and grant budget by identifying the people and resources needed to accomplish the project.
- **manage** implementation of the project as a tool to track implementation against expectations.
- **report on progress in implementing** the key steps of a project by sharing information in the “Update on Progress” reporting column in the grant progress report.
- **measure progress toward reaching a goal**, by identifying the specific indicators used to assess progress, the data collection methods and timeframe for collecting data, and by sharing actual results in the progress report.

The Endowment expects that the Project Workplan will reflect the scope of your project and the size of the grant for which you are applying. Smaller grants and projects of smaller scope and shorter duration require less detailed workplans and measurement plans, while larger projects and grants would necessitate more detailed and lengthier workplans and measurement plans.

Creating a Project Workplan

Using the Project Workplan Template

The workplan template can be modified to include as many long-term goals as your project requires.

In the long-term goal workplan table:

- Type each key step in a separate row.
- List the key steps chronologically by the time frame for each.
- Highlight the key steps to be funded by the Endowment grant, by *italicizing the key step*.
- Add as many rows as needed.

In the related measurement plan table:

- List the indicators that will be used to measure progress toward the long-term goal.
- List the data sources or tools that will be used to collect data and how it will be collected.
- Specify an expected target number or result for each indicator.

Key Elements of a Project Workplan

A Project Workplan should include the following elements. (Definitions of these elements follow this section.)

- The **Project Goal Statement** from the grant application.
- The **System Change Approach** that this project is utilizing for change.
- Each **long-term goal** that the project is working towards.
- All **key steps** undertaken by the project (including inputs, time frames, and responsible persons) *with key steps to be funded by the Endowment highlighted with italics.*
- **Indicators** that will help measure progress toward the long-term goals and **data collection methods and timeframe** to be used to obtain the data.

Project Workplan Definitions

The following terms are used in the Endowment Project Workplan template and samples.

actual results

Within the measurement plan, this is the actual number or target reached on indicators during the grant period. The actual results column is left blank in the application process and completed in the progress report.

For example: 426 stakeholders were informed through organizational newsletters

data collection methods

How the evidence, data or information to measure progress toward a goal is collected.

For example: surveys, interviews, focus groups, observation, document review, and tests.

key step

An activity of the project, using inputs funded by the grant.

For example: Hire a consultant to develop the training curriculum.

inputs (resources)

The resources needed to implement a project activity and achieve project outputs.

For example: staff, consultants, volunteers, new technology, new equipment, and supplies

long-term goals

Long term goals express the desired achievements toward system change that this project is seeking to affect. They may take more than one year or more than one grant period to reach. They are desired improvements or milestones reached in the establishing a strong and sustainable field.

For example: Enhanced capacity to collect, analyze and use cross sector data for healthy aging

indicator

An indicator is the quantitative or qualitative measure(s) that measures progress toward a long term goal. Indicators are measurable and observable. Each goal may have more than one indicator. Where appropriate and possible, identify a numeric target for your indicator. *However, the Endowment recognizes*

that setting numeric targets can be difficult. Therefore, these targets may require revision as your project is implemented.

Sample indicator(s):

- 25 stakeholders are taking action toward a shared goal (increasing the self-identification of family caregivers)
- 45 white leaders and professionals participate in training to better understand racial equity and white privilege
- 120 grassroots stakeholders participated in policy advocacy for early childhood

project goal statement

A broad, general statement about what you hope to accomplish with your project and how you plan to do it. There are two parts to a project goal statement: a “to” part, and a “by” part. The “to” part refers to what you hope to accomplish in the project relative to the target population; the “by” part summarizes the activities you will undertake in order to accomplish your project goal. A project goal statement should also include any systemic change to be achieved by the project.

For example: To create a culture, policies and services to advance health equity for all people in New Hampshire by engaging white leaders in a process to better understand their white privilege and develop skills to be effective allies to end racial oppression.

responsible person(s)

The person or people who use(s) the specified inputs to achieve specified anticipated outputs within a specified time span. Name the person(s) ultimately accountable for the completion of the key step.

time frame

The start date and end date of the period during which an activity will occur. Use *mm/yy – mm/yy* format.

update on progress

Completed for a progress report, this is the description of progress in implementing the key project steps. This column is left blank during the proposal process.