

# Strategic Planning for Community-based Organizations

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Developed by Conservation International Hawai‘i

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## I. Background

This Strategic Planning process has been used by several community-based organizations in Hawai‘i, with guidance from Conservation International<sup>1</sup>. While this is not the only approach to Strategic Planning, it does provide an optional approach that has been used successfully in Hawai‘i. Some organizations have used the process in its entirety, while others have adapted it to best fit their needs. We are gathering experiences from these organizations to help others understand options for using and adapting the process.

**Strategic planning** is an organization's process of defining its **strategy**, or direction, and making decisions on allocating its resources to pursue this **strategy**.

## II. Frequently Asked Questions and Answers

1. **Why is it Important to Develop a Strategic Plan?** An effective Strategic Plan has several benefits. It will help your organization to identify what it wants to achieve and how it will do so. It will help you to understand where you are strong and where you need to improve. It will help your core members come together and agree on their priorities. It will help partners and supporters see how your organization fits in within the landscape of others that are working on similar issues and how they can help. Finally, parts of a good Strategic Plan can be used in proposals and will help make fundraising much easier.

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<sup>1</sup> This document was developed by Conservation International Hawai‘i. For more information, please contact: Scott Atkinson at [satkinson@conservation.org](mailto:satkinson@conservation.org). All materials in this document may be used free of charge and adapted as needed to support non-profit uses. The materials may not be sold nor may a fee be charged for their use. Any written documents based on use of these materials should acknowledge Conservation International Hawai‘i as the original source of the material.

2. **How Long Does a Strategic Plan Last?** An effective Strategic Plan should serve you for two to five years as it typically takes at least this long to achieve most program objectives. However, the plan should be revisited annually and updated as needed.
3. **What makes a Plan Strategic?** An organization can plan by itself, but in order to make the plan Strategic, the organization should consider where it fits within the landscape of partners and others that are working on similar or related issues. Figuring out your organizations Strategic role relative to other organizations and individuals is a key element of Strategic Planning.
4. **Who Should be Involved in the Strategic Planning Process?** The core members of your organization including officers and active members should all be involved in the entire strategic planning process. Additionally, it is recommended that you interview individuals and colleagues who are close to your work and care about your success. Often people outside the organization will be able to see things that you miss. People to consider interviewing include: recipients of your services, volunteers, donors, agency leaders who support your mission, and any others that know you well and want you to succeed. A list of suggested interview questions is provided in the section: **Strategic Planning Interview Questions for External Partners.**
5. **How Long Will It Take to Complete the Plan?** We recommend that small organizations develop an initial plan and then let it sit for two to four months. Creating an initial plan can be done in one day to two days. During the gap time you will have time to reflect on your plan and then come back together to review it. In many cases a plan that has two rounds of thoughtful work will serve you effectively for years. The example **Strategic Planning Agenda** covers one full day of planning, followed by a two to four-month gap period, followed by another day to complete the plan.

### **III. Key Points to Discuss in Strategic Planning:**

To develop an effective Strategic Plan your organization should identify the following information. These key points are addressed in the example **Strategic Planning Agenda**

1. How has your organization been doing to date?
2. What will your organization do in the next 2 to 4 years and what will you not do?
3. What is your vision for the resources or issues that you are addressing (what does success look like)? Consider the vision of the people you serve as you discuss this.
4. What is the role of your organization to achieve that vision (your mission) and what is the role of others?
5. Review the **Elements of an Effective Organization** in your sector and use these to guide you planning. Please add any elements that may be missing.
6. Where are you strong and have made good progress? Why is that? and how can you keep these strengths moving forward?
7. Where are you not as strong? Why is that? Is it important to overcome these weak areas and if so what can you do (solutions)?

8. What specifically does your organization want to accomplish in the next two to four years (your objectives)?
9. What do you have to do to achieve your objectives (activities)? This should also include activities that are needed to maintain your strengths and to overcome your weaknesses?
10. Are there opportunities that can help you achieve your activities and objectives?
11. What are skills, knowledge, human, and financial resources are needed to undertake your activities and achieve your objectives?
12. What is the minimum set of activities that you feel have to be done? These will be your highest priorities activities?
13. Who within your organization will do what?

Key Sections of this Document to help Guide Your Strategic Planning Process

**Strategic Planning Agenda and Meeting Suggestions**

**Strategic Planning Interview Questions for External Partners**

**Elements of an Effective Organization**

**The Kino: A Hawaiian Conceptual Approach to Strategic Planning**

**Why Have a Work Plan**

**Sample Work Planning Template**

**Sample Strategic Plans Developed Using the Process from: Hui Aloha Kiholo**

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#### **IV. Strategic Planning Meeting Suggestions and Sample Agendas**

This document provides two one day agendas to guide community-based organizations in Hawai‘i through Strategic Planning.

##### **Meeting Suggestions:**

We suggest holding at least two one day meetings that involve all the core active members of your organization. The first meeting can follow the Day One Sample Agenda. The second meeting can follow the Day Two Sample Agenda and be held two to four months later after you have had a chance to consider your progress and interview external partners. These agendas have been used successfully in Strategic Planning with community-based organizations in Hawai‘i.

**Location:** The meetings should be held in locations that allow people to participate effectively. It’s ideal to have flip charts and/or a projector so you can both display key information and record input. A community center or school meeting room is ideal.

**Facilitation:** Ideally you will have an outside facilitator with experience in Strategic Planning for Community-based Organizations. There are several organizations and individuals that provide facilitation support and some may provide this at no cost. If for any reason you don’t have an external facilitator, please be sure you do have a person from your organization facilitating the process. They should clearly identify when they would like to provide input into the discussions. At other points during the meeting, they should remain neutral and focus on moving the process forward.

##### **The Gap between Day One and Day Two:**

While some organizations may want to complete their plan quickly, it is helpful to take your time. We suggest a gap of between two and four months between the first and second meeting. This gives participants time to think about the draft Strategic Plan and develop new and important ideas. During this time, small groups may need to meet to work on refining objectives and activities. This is also an excellent time to interview external partners to get their input on the Strategic Plan. Some organizations may choose to interview partners prior to the Day One meeting; however, we suggest interviewing partners between the Day One and Day Two. Having one meeting before interviewing partners provides an opportunity for members of the organization to reconnect and collect their thoughts about the plan before interviewing with partners.

## Day One Draft Agenda: Starting Your Strategic Plan

### Target Outcomes from Day One:

1. **Sharing good memories and experiences from your place and/or your work**
2. **Understanding how well your organization is doing and what you want to do in the next 2 to 4 years and what you want to be sure not to do**
3. **Identifying your Vision for your place, resources, and people, and your Organizations mission or role in achieving that Vision.**
4. **Understanding the key elements of a successful organization and how this relates to a Hawaiian concept of organization effectiveness**
5. **Identifying where you are strong, why and how to stay strong.**
6. **Identifying where you are not as strong, why, and how to overcome any problems**
7. **Identifying what you want to specifically accomplish in the next 2 to 4 years (your Objectives)**
8. **Starting to identify how you will accomplish your Objectives (your activities).**
9. **Identifying what partners you want to interview to get their input**
10. **Assigning next steps and action items to do between now and the next Strategic Planning meeting.**

Time	Session Title	Session Detail and Purpose	Facilitator	Process
9:00 to 9:30	Pule and Introductions	To introduce each other in a way that gets people talking from together from the start of the meeting.	To be determined (TBD)	<ol style="list-style-type: none"> <li>1. Group up with someone you haven't seen lately</li> <li>2. You will introduce each other including name and where you are from</li> <li>3. Find two things that you have in common that you can't see (or that is not obvious)</li> <li>4. Each of you will share one thing</li> </ol>
9:30 to 10:00	Ho'olauna	To share positive memories about your place or people that you are working with. This will ground and inspire the group for the day's work		<ol style="list-style-type: none"> <li>1. In 30 seconds to 1 minute, each person share a favorite memory, experience about their place or work.</li> </ol>
10:00 am to	Brainstorm – the next four years	<ol style="list-style-type: none"> <li>1. How is organization or program doing?</li> </ol>		<ol style="list-style-type: none"> <li>1. For 10 minutes discuss the questions with your</li> </ol>

10:30 am		<ol style="list-style-type: none"> <li>2. What will you do in the next 4 years? (1 to 2 major things)</li> <li>3. What will you not do in the next 4 years? (1 to 2 major things)</li> </ol>		<p>neighbors in groups of 2 or 3.</p> <ol style="list-style-type: none"> <li>2. Each group share one thought on each question.</li> <li>3. Facilitator write the thoughts up on a flip chart until there are no new thoughts.</li> </ol>
10:30 to 11:00	Vision	<p>A vision is a group's hope or dream for the future for your place, your resources, your people, and your issues.</p> <ol style="list-style-type: none"> <li>1. Imagine that its 10 years in the future. What do you, the people you represent, and your partners want to see happening in your place (with your resources, your people, your issues). That is: What does success look like? You can close your eyes and try to envision it and write down what you see</li> <li>2. How close are you to that vision?</li> </ol>		<ol style="list-style-type: none"> <li>1. If your group already has a vision, review that in plenary and make any changes.</li> <li>2. If you don't have a vision yet, break into 3 small groups and answer the questions.</li> <li>3. The facilitator will take input from each small group and write on flip chart or projector.</li> <li>4. We won't try finish a polished vision statement here, but get the input and a smaller group will craft a statement for review later</li> </ol>
11:00 to 11:10	Short Break	No more than 10 minutes		
11:10 to 11:30	Mission	<p>Your mission is your organization's role in helping that vision to come true. You can't do it alone but what is your role (we will discuss the role of others later in the process).</p> <ol style="list-style-type: none"> <li>1. What is your organizations role in helping that vision to come true?</li> </ol>		<ol style="list-style-type: none"> <li>1. Each person take a few minutes to write down ideas for your mission.</li> <li>2. Facilitator write one thought from each person on the board or the projector.</li> <li>3. Discuss as a group until you reach agreement</li> </ol>

				4. We won't try finish a polished mission statement here, but get the input and a smaller group will craft a statement
11:30 to 12:00	Elements of a Successful Organization (the Kino).	To understand what elements an organization needs to be successful and to relate it to a Hawaiian Concept of Organizational Effectiveness		<ol style="list-style-type: none"> <li>1. As a group review the list of elements and add any that are missing.</li> <li>2. Review the Kino and how elements of an effective organization relate to parts of the body and are key to success and health</li> </ol>
12:00 to 12:30	LUNCH			
12:30 to 1:30	Where are you strong and where are you not as strong?	<p><b>Understanding Your Strengths</b></p> <ol style="list-style-type: none"> <li>1. What are your strengths and where have you made good progress?</li> <li>2. Why is that?</li> <li>3. How can you keep these strengths moving forward?</li> </ol> <p><b>Understanding Where You are Not as Strong (weaknesses)</b></p> <ol style="list-style-type: none"> <li>1. Where are you not as strong (weaknesses)?</li> <li>2. Why is that?</li> <li>3. Is it important to overcome these weak areas?</li> <li>4. If so how can you do it? (solutions)?</li> </ol>		<ol style="list-style-type: none"> <li>1. For 15 minutes, groups of 4 discuss and write one to three strengths and weaknesses and reasons. For weaknesses it's important to discuss whether or not you need to be strong in those areas or if it's not important.</li> <li>3. Each group share one response until there are no new ones. The facilitator will list strengths and reasons in one column on the left and weaknesses and reasons below that.</li> <li>2. The group will brainstorm how to stay strong and how to overcome weaker areas. The facilitator will write</li> </ol>

				these thoughts in a column on the right
1:30 to 2:00	Developing Objectives – Part One	<p>Identify what outcomes you want to accomplish in the next 2 to 4 years</p> <ol style="list-style-type: none"> <li>1. Review what you said you want to do in the next four years. (Session at 10 am)</li> <li>2. Review any past objectives (review what you have done in the past – and what you accomplished – so what is priority)</li> <li>3. Consideration of Strength and Weaknesses</li> </ol>		<ol style="list-style-type: none"> <li>1. Facilitator review list of what the group wants to do.</li> <li>2. Facilitator review past Objectives (if there are any)</li> <li>3. Facilitator review Strengths and Weaknesses (and solutions on each)</li> <li>4. Each person list what they want to accomplish (what Outcomes) in the next four years.</li> <li>5. Share one by one and facilitator list</li> </ol>

		4. List what you want to accomplish in the next 4 years.		6. Facilitator group suggestions into categories
2:00 to 3:30	Developing Objectives and core activities – Part Two	Using the Table for making SMART Objectives, develop objectives and core activities for each category		<ol style="list-style-type: none"> <li>1. Break into small groups by category and you have 30 minutes to complete the tasks below.</li> <li>2. Using the table for developing SMART Objectives for each category. If there are several categories each group may need to work on more than one</li> <li>3. Once you have Objectives for each category, go back and discuss and list core activities that need to be done to achieve each Objective.</li> <li>4. Each small group present and discuss in plenary.</li> <li>5. Together edit the Objectives and add any other activities.</li> </ol>
3:30 to 4:00	Next steps	<p>Identify the next steps to complete the process</p> <ol style="list-style-type: none"> <li>1. What partners to Interview (See <b>Sample Interview Questions for External Partners</b>)</li> <li>2. Do you need smaller groups to complete a draft of the Plan (Vision, Mission, Objectives, and Activities)</li> </ol>		<ol style="list-style-type: none"> <li>1. Discuss in plenary</li> </ol>

		<ol style="list-style-type: none"> <li>3. Prioritize activities and create a work plan timeline</li> <li>4. Identify the resources needed to achieve the Objectives and the activities (money, people, etc.)</li> </ol>		
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### The Gap between Day One and Day Two

We recommend a gap of between two and four months between the first and second meeting. This gives participants time to think about the draft Strategic Plan and develop new and important ideas. The activities to carry out during this gap should be identified during the Day One meeting in the Next Steps session.

Activities may include:

1. This is an excellent time to interview external partners to get their input on the Strategic Plan.
2. Small groups may need to meet to work on refining the Vision, Mission, Objectives and Activities.
3. Core organization members can use this time to Identify the resources needed to achieve the Objectives and the activities (money, people, etc.)
4. This is a good time to develop a draft work plan. See the **Sample Working Planning Template**

## Day Two Draft Agenda: Completing Your Strategic Plan

### Target Outcomes from Day Two

1. **Sharing good memories and experiences from your place and/or your work**
2. **Reviewing and finalizing your Vision for your place, resources, and people, and your Organizations mission or role in achieving that Vision.**
3. **Reviewing Partner input on where you are strong, why and how to stay strong.**
4. **Reviewing Partner input on where you are not as strong, why, and how to overcome any problems**
5. **Refining and Prioritizing your Objectives. Making sure that if you achieve your Objectives you feel confident that you will progress well toward your Vision and your mission.**
6. **Refining and prioritizing your activities. Including making sure that if you achieve your activities that you will achieve your objectives, or adding new activities.**
7. **Identifying what financial and human resources you need to accomplish your activities and objectives.**
8. **Assigning next steps to prepare the plan for final review, to present the draft to members and partners for comment, to finalize and share the final plan**

Time	Session Title	Session Details and Purpose	Facilitator	Process
9:00 - 9:30	Introduction and Agenda Overview	<p>This session will open the meeting, introduce the group, inspire the group for the day's work, and review the planning process.</p> <ol style="list-style-type: none"> <li>1. Pule</li> <li>2. Introductions</li> <li>3. Ho'olauna – Connection to place</li> <li>4. Review of strategic planning process</li> <li>5. Review agenda</li> <li>6. Target date for completion</li> </ol>	TBD	<ol style="list-style-type: none"> <li>1. The facilitator will lead the group through the activities of this session as one group.</li> <li>2. Each person will be asked to share about their connection to the place and or the people and one memory or comment.</li> </ol>
9:30 - 9:50	Review	<ol style="list-style-type: none"> <li>1. Review of Vision and Mission</li> <li>2. Review of Strengths and weaknesses from Day One</li> </ol>		<ol style="list-style-type: none"> <li>1. In plenary – Facilitator to provide overview and take comments</li> </ol>

9:50 - 10:20	Partner Feedback	<ol style="list-style-type: none"> <li>1. Strengths and areas for improvement</li> <li>2. Ways to build on and address these</li> <li>3. Objectives</li> </ol>		<ol style="list-style-type: none"> <li>1. Review the feedback received from partners.</li> <li>2. The facilitator or other person should have these summarized for presentation.</li> </ol>
10:20 - 11:00	Objectives	<p>Review and Update Objectives</p> <ol style="list-style-type: none"> <li>1. Review Draft Objectives</li> <li>2. Review Things we want to accomplish in 2 to 4 years</li> <li>3. Review priority objectives from partner input</li> </ol>		<ol style="list-style-type: none"> <li>1. Review Objectives from Day One</li> <li>2. Review Partner input on Objectives</li> <li>3. Check – if we achieve these Objectives will we achieve our vision and mission – if not, we may need new objectives.</li> <li>4. Refine or add Objectives (including adjusting timelines as needed).</li> </ol>
11:00 – 11:10	Break			
11:10 - 11:40	Prioritize Objectives	<p>Prioritize Objectives.</p> <ol style="list-style-type: none"> <li>1. Develop criteria for prioritization</li> <li>2. Vote and discuss</li> </ol> <p>This does not mean other objectives are not important but provides insight on what is most important to the group and helps develop the timeline on work planning</p>		<ol style="list-style-type: none"> <li>1. Develop Criteria for Prioritization as a group. Good to have 5 to 10.</li> <li>2. To Prioritize Objectives, each person gets five votes – can only put one vote on one objective.</li> </ol>
11:40 - 12:00	Opportunities	<p>Review Opportunities discuss how to pursue them.</p> <ol style="list-style-type: none"> <li>1. Review opportunities from partners' input</li> </ol>		<ol style="list-style-type: none"> <li>1. Facilitator should have summarized input from partners</li> <li>2. Discuss other opportunities as a group.</li> </ol>

		2. Identify other opportunities		
12:00 - 12:45	Lunch			
12:45 - 1:30	Refine Activities	<p>To refine activities</p> <ol style="list-style-type: none"> <li>1. Are any new activities needed? e.g. more detailed sub-activities to achieve core activities?</li> <li>2. Identify activities that HAK should do</li> <li>3. Identify any activities that partners should do</li> <li>4. Prioritize activities by Objective</li> </ol>		<ol style="list-style-type: none"> <li>1. Small Group Breakout by Objective.</li> <li>2. Each group should address the questions.</li> <li>3. To determine if any additional activities are needed, it's important to ask: if we do these activities will we achieve our objective? If not, you may need new activities. You can set up group to flesh out activities at a later date if there is not enough time. Such groups should consist of those responsible for implementing the work</li> </ol>
1:30 - 2:30	Resources needed to Accomplish the for Activities and Assignments	<ol style="list-style-type: none"> <li>1. Identify what human and financial resources needed for each activity under each objective</li> <li>2. Identify who will do each activity (or what groups of people).</li> </ol>		<ol style="list-style-type: none"> <li>1. Small Group Breakout by Objective</li> <li>2. Can use the Sample Workplan Template to record needs and assignments</li> </ol>
2:30 – 2:40	Break			
2:40 - 3:30	Discussion of Activities, Resources to Accomplish the Activities, and Assignments	<ol style="list-style-type: none"> <li>1. Group report back and discussion</li> </ol>		<ol style="list-style-type: none"> <li>1. Each small group will report back on their activities and needed financial and human resources to</li> </ol>

				<p>accomplish the activities.</p> <p>2. Others provide input and suggestions. Remember for each objective you should ask – if we do these activities will we achieve our objective?</p>
3:30 - 4:00	Next Steps & Holomua	<ol style="list-style-type: none"> <li>1. Homework for the group and the facilitator to get the draft Strategic Plan ready for review</li> <li>2. Identify when you will present the draft to members and partners for comments</li> <li>3. Timeline for Final completion and key questions. For example, you want to include photos and lay out</li> <li>4. Identify how you will share the plan.</li> </ol>		<ol style="list-style-type: none"> <li>1. Discuss in plenary and develop a clear timeline for completing the plan, presenting to partners, and finalizing the plan, and how you will share it once complete.</li> </ol>

## V. Strategic Planning Interview Questions for External Partners

### Background:

An organization can plan by itself, but in order to make the plan Strategic, the organization should consider where it fits within the landscape of partners and others that are working on similar or related issues. Figuring out your organizations strategic role relative to other organizations and individuals is a key element of Strategic Planning. Also, partners can often present great opportunities to help you achieve your objectives. As a result, it is highly recommended to include external partners in your Strategic Planning Process in at least four ways:

1. Let them know that you are undertaking Strategic Planning and will be in touch with them about it during the process to seek their input/feedback.
2. Select key close partners to interview to provide input to your planning process.
3. Once you have a draft plan, hold a review meeting and invite key members of your organization and partners. Discuss areas of potential collaboration with partners.
4. Share your final strategic plan widely with partners and encourage them to contact you if they have questions or comments, or would like to discuss areas of collaboration.

This document focuses on interviewing close partners to get direct input that can help you develop your plan. The following questions need to be answered to help you figure out who you will interview and what you want to ask them.

1. Who should provide input to your strategic plan? - We suggest interviewing between four and eight external partners
2. What questions do you want to ask them? (Please see our suggestions below)
3. Who will interview them?
4. How will you use this information?

**Community-based Strategic Planning  
Optional Questions for Eternal Partners**

**Date** \_\_\_\_\_

**Interviewer** \_\_\_\_\_

**Person**

**Interviewed** \_\_\_\_\_

**Their Role/Relationship w/ Org.:**

\_\_\_\_\_

Question	Response
1. What are the strengths and successes of the organization/program to date?	
2. How do you suggest the organization/program build on its strengths and successes?	
3. What are areas for improvement in the organization/program?	

<p>4. What are the main challenges facing the organization/program?</p>	
<p>5. How do you suggest the organization/program address the areas for improvement and challenges?</p>	
<p>6. In your opinion, what should the two highest priority objectives be for the organization/program over the next 2 to 4 years?</p>	
<p>7. Are there any opportunities that may help the organization/program achieve its objectives?</p>	
<p>8. Anything else?</p>	

**People to Interview for Review and Role in or relationship to your organization**

<b>Person</b>	<b>Role in or Relationship to your Organization</b>

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## **VI. Essential Elements of a Successful Organization**

1. Clear Vision and Mission
2. Effective Administration – accounting, compliance, reporting (internal and external)
3. Shared Objectives
4. Human Power sufficient to accomplish job
5. Program knowledge – cultural and ecological
6. Financing & Resources to get work done - sustainability
7. Relationship with Donors – managing grants
8. Engagement with stakeholders
9. Effective communication -internal & external
10. Program Monitoring
11. Resource Monitoring
12. Effective Board

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## VII. Why Have a Work Plan?

Often people say, why bother having a work plan. We know what we need to do, let's just get on and do it. Starting a project without a thoughtful work plan is like going off on a road trip without a map. You may eventually get to your destination, but you're likely to spend more energy, time and resources meandering around. A clear and detailed work plan can help you to: stay organized, meet deadlines and complete all the steps involved in your project. It forces you to plan out the details to getting an objective done and provides clarity to staff on responsibilities and scheduling. By thinking through the activities that need to happen and when, work planning helps to identify potential problems (for example scheduling), evaluate options and pre-empt difficulties.

A work plan can be developed for an organization, team or an individual. We recommend that if an organization has completed a Strategic Plan that they organize their objectives, activities, and sub-activities into a work plan to help guide implementation of their Strategic Plan.

Below are some of the benefits of work planning explained. Please see the sample work plan template and how to complete it.

### Reality check

A work plan functions at the outset, as a firm reality check. Work planning will alert you to issues like potential pitfalls and sufficient staff resources before you commit to a project.

### Charting direction

A project work plan that is regularly updated and shared, helps to keep all staff involved on the same page, facilitates collaboration and organization, and clarifies staff tasks and roles for objective completion by clearly delineating individual responsibilities and their relationship to the larger project. The absence of a clear work plan also risks that the manager has a poor understanding of staff activities. With a clear work plan everyone remains clear on the objectives and the expected path to objective completion.

### Scheduling

A work plan includes an accurate timeline for the scheduling of project activities. This schedule allows you to understand the true time commitment a project requires and helps ensure resources required are appropriately mobilized for activity completion. Once all the activities have been inserted to the work plan, the work plan allows for careful evaluation of the scheduling to make sure activities are not too heavily stacked in certain months and that sufficient resources will be available by that time for task completion.

### Resource requirements

Projects typically require financial, material and human resources. Understanding these resource requirements and planning for them in the work plan will help ensure resources are available when required to complete activities on time.

### Monitoring

A work plan provides an excellent monitoring tool for tracking progress towards an objective, facilitates adaptive planning and provides a tool to assess staff performance, helping to ensure transparent accountability. There is an option to insert milestones into a work plan to help assess progress, e.g. a date for a report completion, or for a number of trees to be planted by.

#### Identifying obstacles

A well-researched work plan helps highlight potential difficulties and proactively offers solutions through activities development. Involving staff in work plan development that have responsibilities for implementing the plan is very important in helping develop an effective plan that considers potential pitfalls.

#### Communication tool

As well as acting as a tool to clarify to staff the pathway to reaching an objective, a good work plan is a great communication tool to use with funders, to demonstrate clarity of thought and professionalism in proposal development, to increase transparency of your work and as a useful monitoring tool to assess progress and help explain any adaptations that may be required at a later date. Donors normally now require work planning as part proposal terms.

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## VII. Sample Work Planning Template

OBJECTIVE 1: Develop baseline information on marine resources and their use														
OBJECTIVE 2: Clear invasive species from coastal area														
ACTIVITIES	Who Responsible	2017												DETAILS
		1	2	3	4	5	6	7	8	9	10	11	12	
<b>Objective 1: Develop baseline information on marine resources and their use</b>														
<b>1.1 Conduct ecological survey of the area</b>														
1.1.1. Contracting community members	Proj. Lead	x												Develop job description
1.1.2 Training for creel, fish flow and Huli'ia surveys	Proj. Lead	x	x											Organize training, conduct in mid Feb, inquire for workshop site
1.1.3 Conduct surveys	Assistant			x	x	x	x	x	x	x	x	x	x	Monitor, schedule and assist survey staff
1.1.4 Compile and analyze survey information	Proj. Lead			x	x	x	x	x	x	x	x	x	x	Prepare and submit data sheets to UH
1.1.5 Share info collected with entire community	Proj. Lead									x				Plan and conduct community meetings
<b>1.2 Conduct survey on human use of resources</b>														
1.2.1. Seek advice from UH on survey design														
1.2.2. Coordinate with community for survey														
<b>Objective 2: Clear invasive species from coastal area</b>														
<b>2.1. Invasive species survey</b>														
2.1.1. Design invasive species survey with help from UH														
2.1.2. Train staff														
2.1.3. ....etc.....														
<b>2.2. Acquire relevant permission for removal</b>														
2.2.1. Meet with local authorities to discuss the plan														
2.1.2. ....etc.....														