

CREATING A WORK PLAN

by Michael Erlanger

& Michael Blatz

Indigenous Planning Studio

December 2016

Summary

This fact sheet describes how to make a work plan to organize and manage your community planning process.

Keywords: communication tools, managing the process, direction setting, planning team, funding

What is a Project Work Plan?

Your project work plan is a way for you to organize your planning process. It breaks down your multi-year process into smaller pieces. This helps to organize and manage your process to keep things running smoothly. Your work plan includes details about the activities, roles, timelines, and budgets of your planning process.¹

Activities: What Needs to be Done?

Overall Project Scope

Your project scope is a detailed description of the planning process. It is a good way to start thinking about what needs to happen along the way to complete the planning process. It describes:

- what it is
- why it is important
- who will be involved
- who will benefit
- where it will take place
- when it will happen
- how much it will cost
- what resources are needed

Defining the scope can help you and your community understand what needs to be done. The more detailed the description the better.² That being said, there are often many unknowns and the project may change over time. When these changes happen, you can look back at the original scope to see how they fit into the overall process.

Phases and Major Tasks

The next step is to think about the phases and milestones for the planning process. Indigenous and Northern Affairs Canada (INAC) describes the planning process in four main phases:

1. pre-planning,
2. planning,
3. implementation, and
4. evaluation and monitoring

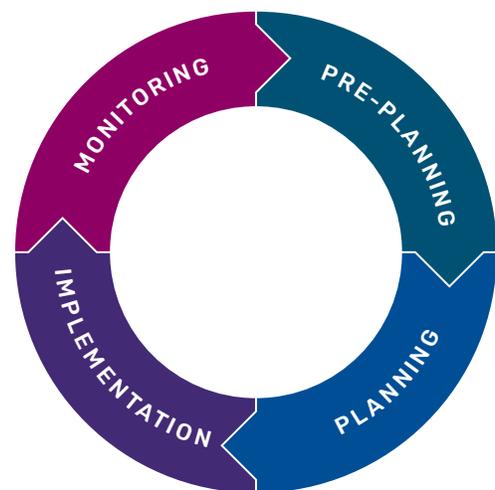


Figure 1 | The planning cycle.

Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2013. Accessed October 24, 2016, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. p. 14.) Used with permission.

Next, think about the major tasks that you need to do during each phase. Also start thinking about how you will complete each task. This will be harder for the implementation and evaluation phases since they come later in the planning process. Instead, focus more on major tasks during the planning phase:

- gather background information
- complete community analysis
- create vision statement and values
- build a comprehensive strategic framework
- set goals and objectives
- identify projects
- create an implementation strategy

Roles: Who Will Be Involved in the Activities?

Think about the people who will need to be involved to carry out each task and activity. Often, these people will either lead the activity or participate in it.

Once your list of tasks is complete, your planning team can assign a task leader to carry out each item. The person in charge of a task should have the right skills to do a good job. Sometimes this means a community member gets more training. For bigger or more complicated tasks, the leader might need a few other people to help out.

Next, think about any people who should participate to carry out your tasks. You might need to interview Elders, consult an engineer, or reach out to an organization. Some tasks may have many participants and some may have none.

Throughout the planning process, it is important to include a wide range of people like Elders, youth, men, women, family groups, on-reserve members, and off-reserve members. Figuring out who needs to be involved at this stage helps make sure no one important gets left out. It also helps you think about the best ways to get participation from different groups of people.

For more information about this, see *Establishing the Planning Team* and *Working with a Professional Planner*.

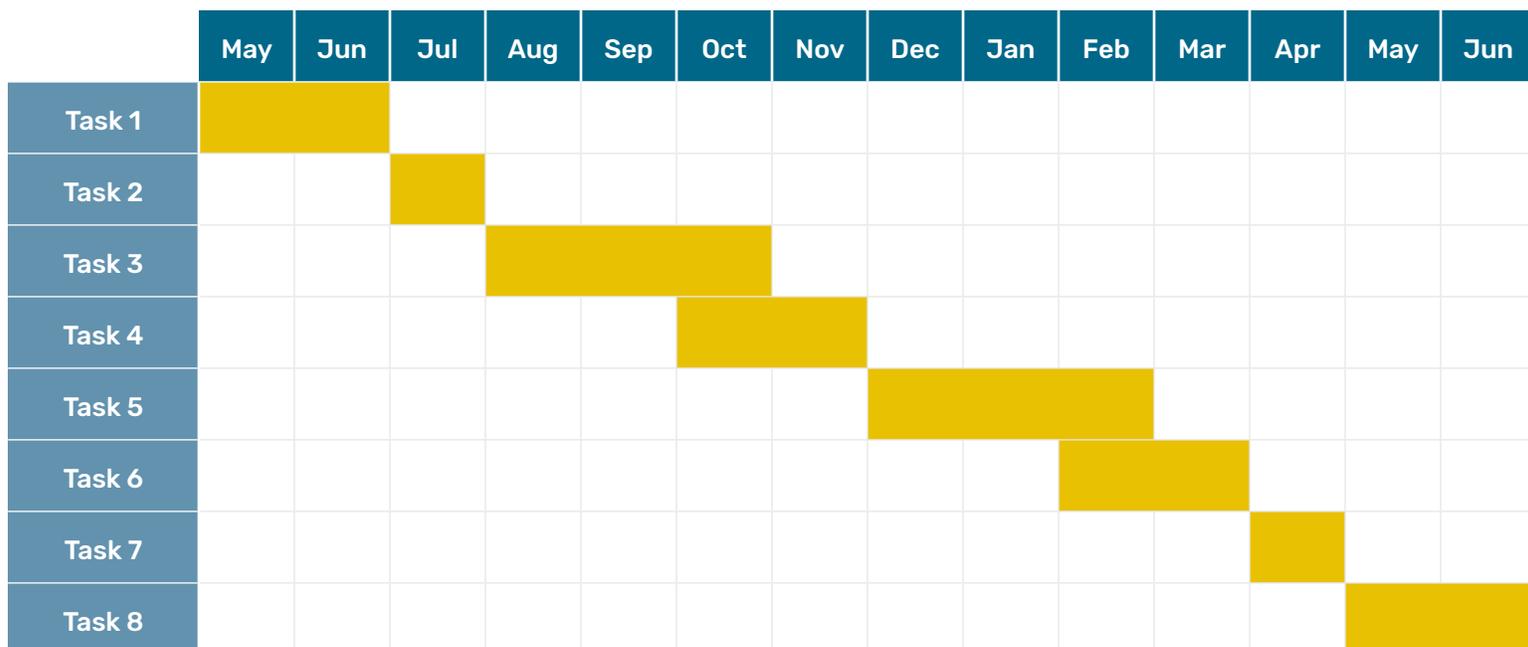
Timelines: When Will Tasks Get Done?

Your planning team works together to create and maintain a master schedule throughout the life of the planning process. This schedule might include key milestones like community engagements, construction periods, and fund-related deadlines.

To get started, think about the phases, milestones, tasks, and activities that you came up with. Lay out the phases and major milestones first before moving on to the smaller items. Next, think about which items need to get done in a certain order and which ones can get done at the same time. Your timeline will likely change over the course of the planning process but having one can help keep things on schedule.

Gantt charts show the start and end dates of tasks. These are helpful when figuring out the sequence of tasks. Some versions of Microsoft Excel come with a Gantt chart template or you can create your own.

Table 1 | Example of a Gantt Chart.



Budgets: How Much Will This Cost?

Based on your list of tasks, you can start to estimate costs and create your budget. Start by thinking about any costs associated with the people and resources involved in each task. Costs may include printing documents, providing food at community engagement events, getting training for planning team members, hiring a consultant, or buying new equipment. Similar to your timeline, your budget and costs may change, but creating a budget can help you to prioritize items.

Final Thoughts

You may find it helpful to organize the tasks, roles, timeline, and budget together to give you an overview of the planning process. This could look something like the table below.

Alternatively, tools like a Gantt Chart and budget can show very detailed schedules and costs. Both the broad view and detailed view are important to keep in mind throughout the planning process.

Table 2 | Example of how to organize work plan tasks in a table.

Phase	Tasks	Leader	Team	Participants	Timeline	Resources	Budget
Pre-Planning	Task 1	Jane	-	Elders	5 days	printing	\$20.00
Pre-Planning	Task 2	Sally	Bob, Mary	engineer	3 months	-	\$5000.00
Planning	Task 3	...					
Planning	Task 4	...					

Further Reading

CCP Handbook: Comprehensive Community Planning for First Nations in BC by Indigenous and Northern Affairs Canada

The Comprehensive Community Planning Handbook was created in British Columbia and has been used to guide Indigenous planning across Canada.

https://ccednet-rcdec.ca/sites/ccednet-rcdec.ca/files/the_ccp_handbook.pdf

The Canadian Institute of Planners Professional Practice Manual by David Witty.

The section titled 'Planning to Plan' on pages 56-63 expands on ideas presented here.

<http://municipalcapacity.ca/+pub/document/resource-materials/planmanual.pdf>

Endnotes

- 1 Indigenous and Northern Affairs Canada, "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition," *Indigenous and Northern Affairs Canada*, 2013, Accessed October 24, 2016, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. p. 22.
- 2 INAC, 2013, p. 46.

In association with