

Work Planning

In Context

BHO Component 1.3 - Leadership and Planning addresses the key issues tied to setting an overall direction for the organization and ensuring that it is realized. This component of BHO includes planning, monitoring performance, continual improvement and leadership.

Organizational planning is a shared responsibility of the board of directors and staff. The board is responsible for setting the planning framework by approving the vision, mission, values and strategic directions. Staff work within this framework to establish the operational plan and team work plans. Planning encompasses everything from your hopes and dreams for your community (the vision) to the day to day work that staff do (team work plans).

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Part of the BHO Roadmap to a Healthier Organization

The Roadmap is a series of short primers that use key components of the Building Healthier Organizations (BHO) accreditation program as guideposts to point organizations to some of the key considerations and existing resources that might help them get off on the right foot at an early stage. The aim is to support new and developing community health centres to strengthen their capacities in fundamental areas of organizational health.

Work Planning

Key Concepts

- Planning cycle
 - Work plan
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About Work Planning

“Work planning” is what the term itself says – it is about planning your work.

Work plans typically cover a year or sometimes less. They deal with ongoing, routine or regular events as well as activities, projects or initiatives. They will include some items in the operational and strategic plans, and some that are not captured there because they are more routine than strategic at this time.

They may describe the work of individuals or groups such as staff teams, departments or the board.

Key Markers on the Road to a Healthy Organization

At every stage of your organization’s development, there will be key milestones that must be achieved – markers along the road to being a healthy organization.

Key markers of health in the area of work planning include:

- Developing a format or template for work planning that feeds into your operational plan. (You may actually want use the same format, just adding more detail.)
- Discussing what level of detail you want to see in work plans as a way of achieving balance (not too much detail; not too little).
- Linking your work planning cycle to your operational planning and budgeting cycles so that planning will inform budgeting.
- Establishing a monitoring cycle that is supportive to the teams and individuals who “own” the plans and that provides management with the information it needs to ensure that things are being accomplished according to the plans.
- Linking monitoring to performance review and development.

Key Steps and Considerations in Work Planning

Who needs to have a work plan?

Ideally, individuals and teams should have work plans. However, you may find that where jobs are routine, the job description serves as a type of work plan.

A work plan is important where there is enough complexity involved in a job that a detailed plan of how that work will be organized is needed. Why?

- To help those involved organize their work; to keep things on track.
- To help communicate with management so that management knows what is happening and that its expectations are being met.

In the case of team or department work plans, to help communicate with other parts of the organization to ensure appropriate coordination of activities.

In other words, a work plan is an aid to organizing work and to communicating between different levels and parts of the organization.

Project Planning

Project planning is a topic on its own and beyond the scope of this section of the Roadmap. Project plans are a form of work plan and may find expression within team or individual work plans. Project plans typically include much the same information. The act of project planning is different, however, with a great deal of emphasis on logistics and resourcing – much more than a simple work plan that deals with fairly routine or well-established activities.

The Board Calendar as a Work Plan

BHO expects boards to have work plans. This can take the form of a board calendar that shows the routine and other activities of the board for the coming year. For example, activities such as regular board orientation, compliance monitoring, financial review, the AGM and all the activities associated with a successful AGM, strategic planning and even BHO itself would appear on a board calendar. A board calendar may also show when/how some of the work on the operational plan will affect board meetings and agendas for example, committee reports or retreats to deal with specific issues.

Road Hazards

- ❑! Remember that work planning is not just a tool that supports accountability. Perhaps more importantly, it is a tool that supports better communication between different parts of the organization.
- ❑! Strive for balance. Make sure your plan includes projects or activities that have achieved some level of profile in the organization (perhaps because other things depend on them) or that demand some degree of organization. Don't "over-plan".

Links and Resources

[BHO Resource Library - Web Link](#)

COHI's resource library contains a sample work planning template, program planning process, board calendar and other resources.

See Also

Strategic Planning

Operational Planning

Team Work and Collaboration