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**Work Plan Template**

**Purpose**

A work plan is a detailed description of an organization's proposed activities and actions. Having a detailed work plan helps Colorado Trust staff understand the plan to address the overarching needs, the timeline, and the relationship between different activities. It is a key tool to help Trust staff monitor and support the grantee and allows the grantee a straightforward way to explain what they are working on and where they are in the process.

A work plan is required for most Colorado trust programmatic grant applications and continuation applications for multiple-year awards. Smaller grants may not require a formal work plan (in table format), and general operating support grants do not require a work plan.

**Instructions**

The work plan is in the form of a table with objectives, outcomes, activities and corresponding details. The table should provide a sequential listing of the applicant’s proposed activities and complement what is in the narrative part of the grant application. The activities in the work plan are just for the efforts that will be supported by the grant from The Colorado Trust. If there are elements of a larger collaborative effort, or a larger project that has multiple funders, then please address that in the narrative part of the grant application, amendment request or requested documentation. Use this work plan for only what the grant from The Colorado Trust will support.

In addition to aligning the work plan with the narrative description of the proposed work, grantees and applicants should align the work plan with the budget that they are submitting. The work plan and the budget should serve as complementary documents. The activities included in a work plan should be clearly reflected in the budget, and every budget line item should be represented by activities or outputs proposed in the work plan.

Applicants (or current grantees) are generally required to write a work plan for 12 months of the proposed project at a time, although the Trust may deviate from this general rule at times, and at its discretion. Applicants should always refer to the formal request for proposals (RFPs) or talk to their Trust grant monitor about what will be required in a work plan.

Applicants (or current grantees) should fill in the details of the work plan by objective, with each objective requiring its own table. The applicant should write the desired outcome for each objective (i.e., what does the applicant hope will change, or hope the result will be if that objective is achieved). Then each cell of the table is an opportunity for the applicant to provide a detailed description of each activity.

* Enter the applicant organization's name, contact name and contact information.
* There is no minimum or maximum number of objectives; however, each application should contain sufficient detail to describe the proposed project and provide reviewers with enough detail to assess the work plan fully. If more objectives than those listed in this template are needed, please copy and paste the table and add additional information.
* An objective should ideally be in the SMART format (specific, measurable, achievable, relevant, and time-phased), and related to the overall goal of the project or initiative.
* Each objective needs a desired outcome. The outcome is a measurable element or result that the applicant/grantee is hoping to see changed (e.g., an increase or decrease in something) or addressed through the implementation of work plan activities and objectives.
* Enter all of the activities that will lead to the achievement of the corresponding objective. Activities are the tasks that the applicant is planning to do, the services being provided, or the products produced and distributed. Enter as many lines for activities (or subtract lines) as needed.
* For each activity, enter the corresponding person (by their job position/title [not person’s name]) who is responsible for the completion of the activity, the time frame (start and end date, month and year are acceptable), and the deliverable(s) or output. Outputs are tangible and countable deliverables that are produced or accomplished through the completion of activities (e.g., number of trainings, number of contracts secured, number of staff trained, number of people served).
* For each activity, please briefly describe the budgetary implications of conducting that activity. It is not necessary to include the estimated dollar amount, rather state what the expense that will be included in the budget will be. For example, if the organization will need to pay for a consultant for that activity, then type “consultant fees” in the table; if the organization will need to pay for travel costs, then type “staff travel” in the table. If there are no discernible budgetary costs associated with that activity, then simply leave the cell blank. This will also help to ensure that the budget and the work plan align.

**Work Plan Sample**

* **Organization Name:** ABC Organization
* **Contact Name:** Cristina Everyperson
  + **Email:** everyperson@abcorg.org
  + **Phone:** (719) 555-0123

**Work Plan Timeframe:** January 1, 20XX to December 31, 20XX

**OBJECTIVE #1:** By the end of June, ABC organization will implement a series of training workshops for county residents with an income level under the federal poverty level on how to prepare healthy, well-balanced, and affordable meals

**Outcome #1:** Increase the self-efficacy of care providers to prepare healthy, well-balanced and affordable meals

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 1.1: Members of the education team will receive training on how to implement the *Happy Cooking* curriculum | Education Director, Education Coordinator, Health Educator, Evaluation Coordinator | 1/1/20XX – 2/28/20XX | 3 staff trained | Training registration fees; staff travel |
| 1.1: The educational coordinator will adapt the *Happy Cooking* curriculum to align with local community needs, cultural and local food preferences and availability, and the timing of workshops | Education Director, Education Coordinator | 2/1/20XX – 3/30/20XX | 1 adapted *Happy Cooking* training curriculum; 1 adapted participant manual, take-home materials, and set of audio-visual materials |  |
| 1.2: The chief finance officer will contract with the local community center to use their kitchen and dining room facilities to host the workshops | Education Director, Chief Finance Officer | 2/1/20XX – 2/28/20XX | 1 contract secured | Facility rental fees |
| 1.3: ABC Organization will contract with a childcare provider to provide services during the workshops | Chief Finance Officer, Education Director | 2/15/20XX– 3/31/20XX | 1 contract secured; additional insurance secured | Childcare fees |
| 1.4: ABC Organization will create marketing materials for the workshops | Communications Director, Education Coordinator, Health Educator | 3/15/20XX– 4/15/20XX | 1 electronic flyer; 1 paper flyer; 5 social media posts; 1 web site blurb |  |
| 1.5: ABC Organization will print all workshop and take-home materials for participants | Health Educator | 5/1/20XX – 7/15/20XX | Printed participant manuals; printed take-home materials, recipe cards, and posters | Printing costs |
| 1.6: ABC Organization will market the workshops specifically to lower-income residents of the county | Communications Director | 5/1/20XX – 7/15/20XX | 10 social media posts; 10 flyers posted; 1 web post; 1 registration site created; outreach to 5 local partners |  |
| 1.7: ABC Organization will purchase incentive items for workshop participants | Health Educator | 6/1/20XX – 6/15/20XX | 50 gift cards purchased | Gift cards |
| 1.8: ABC organization will purchase all of the necessary cooking supplies and food items to conduct the workshops | Health Educator | 7/1/20XX – 9/30/20XX | Cooking utensils purchased; ingredients purchased | Supplies |
| 1.9: ABC Organization will hold two series of workshops | Education Coordinator, Health Educator | 7/15/20XX– 10/31/20XX | 2 series hosted (each with 6 classes); 50 participants | Refreshments |
| 1.10: The education team will meet regularly to assess the progress of workshop development and marketing | Education Director | 3/15/20XX – 11/30/20XX | Semi-monthly team meetings; process evaluation notes and plan |  |
| 1.11: ABC Organization will evaluate the effectiveness of the workshops in raising the self-efficacy of participants | Evaluation Coordinator | 5/1/20XX – 12/31/20XX | 1 evaluation plan; Participant evaluation instrument; 50 completed evaluations; 1 final evaluation report | Evaluation incentives |

**Work Plan Table**

* **Organization Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Contact Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
  + **Email:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
  + **Phone:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Work Plan Timeframe \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** to **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**OBJECTIVE #1:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #1:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 1.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 1.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 1.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 1.4: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 1.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |

**OBJECTIVE #2:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #2:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 2.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 2.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 2.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 2.4: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 2.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |

**OBJECTIVE #3:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #3:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 3.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 3.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 3.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 3.4: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 3.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |

**OBJECTIVE #4:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #4:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 4.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 4.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 4.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 4.4: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 4.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |

**OBJECTIVE #5:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #5:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 5.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 5.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 5.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 5.4: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 5.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |

**OBJECTIVE #6:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #6:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 6.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 6.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 6.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
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| 6.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |

**OBJECTIVE #7:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outcome #7:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Activities** | **Responsible Party(ies)** | **Timeframe** | **Outputs/**  **Deliverables** | **Budget Implications** |
| 7.1: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 7.2: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 7.3: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 7.4: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |
| 7.5: *Insert activity* | *Position Title(s)* | *Insert Start and End Date* | *Insert Deliverables* | *Insert Budget Item* |