# Best Practices #3.1:

# Annual work planning framework.

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# Proposed procedure for WMA work planning

**Step 1:** **WMA`s management to initiate the development** of the annual work plan and budget by developing the first draft of the annual work plan and budget Review the previous year's work plan checking for incomplete activities WP, budget, and including the coming activities. Develop the first draft of the WP and budget.

**Step 2:** WMA management engages **donors, supporting NGOs and other technical partners** in work planning and budget development so they can advise on technical issues, incorporate their inputs, activities and budgets. All proposed changes incorporated.

**Step 3:** Management team presents the first draft of the annual work plan and budget to individual **AA committees** (finance and planning com, security committee & Executive committee) for their review inputs and comments. All proposed changes incorporated.

**Step 4:** Present the draft annual work plan and budget to the **Board of Trustee,** for their advice, review, inputs and comments. All proposed changes incorporated.

**Step 5:** Present the draft annual work plan and budget to the **District Advisory Board (DAB)** for their review, comments and technical advice. All proposed changes incorporated.

**Step 6:** Present the draft annual work plan and budget to the AA and villages representatives for **approval**.

**Step 7:** Share the **final approved work plan** and budget with relevant stakeholders, including the WMA member village, AA, advisory board, board of trustees as well as supporting NGO's and partners.

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**Effective Annual Work Plans Provide Organizations with**

☑ A tool to translate strategic plans into yearly action;

☑ A big-picture view of what they are trying to achieve in their work, and a focus on impact and results rather than only on activities and tasks;

☑ A framework that prioritizes the allocation of time and resources and identifies key funding gaps;

☑ A tool for unifying a team around a clear set of goals and targets;

☑ A system to track, measure, evaluate progress and change course as needed;

☑ A framework for tracking internal performance and holding a team accountable for delivery;

☑ A tool to help boards review and monitor an organization's priorities and annual allocation of resources.

# Tips for Effective Annual Work Planning;

- **Simplicity is key** - Annual work plans should focus on higher-level goals, the key actions required to implement those, and indicators of delivery. More detailed activities can fall into program and individual work plans.
- **Software or platform** - Think about which software will work best – Excel spreadsheet is recommended software for Annual work planning and many organizations use Excel. Project management software, such as Zoho[1] or Trello[1], is more helpful for more detailed plans.
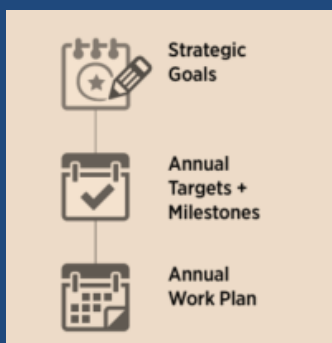


- **Customize** your work planning framework (columns in the template) so that it works for your needs.
- **Start early** – Don't wait for the year to begin to start developing your annual plan. Two or three months before the end of your financial year is usually a good time to start developing a work plan for the year ahead.
- **Include organizational growth targets** such as staff development, don't just focus on programmatic activities.
- Make sure your annual work plan is **aligned with your annual budget** – The budget is the financial management tool for implementing your work plan. The work plan should guide how the organization allocates its resources. It is a good practice to put reference numbers to your work plan activities and/or milestones so that the same numbers can be referenced in the annual budget lines.
- **Use it and review it** – Don't just create the plan and let it sit on a shelf. Print it out, hang it on your wall, and review it at least quarterly with your team to make sure your work and efforts are collectively moving you closer to your goals and targets.

# Annual work plan framework

This document provides a template for an WMA annual work plan. The objective of this format is to fit an entire annual work plan and work tracking system within a simple and easily digestible format. This is useful for WMA management, in terms of condensing more detailed work plans into a set of summary goals, key tasks, and annual targets, as well as for reporting with the same template using additional columns as needed.

Using this format requires, above all, that WMA management think critically about their major annual priorities, key tasks and targets, and that they frame and present these in precise and clear language indicating a list of deliverables for each milestone.

This format also enables the entire annual work plan columns to be presented on a single page or a few pages depending on how many milestones and activities are included.

The text presented on the provided worksheet ('Sample Work Plan') provides an example of how a WMA work plan can be presented, while the third sheet presents a blank work plan template into which you can enter your own text to make this plan useful to your WMA annual work plan template[1]

Honeyguide's proposed annual work plan for WMAs must contain the following key columns;

1.1 **Major annual goals/Milestones –** these should align with the strategic plan. What are the key, critical outcomes your WMA needs to achieve this year? The Goal should be a short statement, using as few words as possible. These goals lead into and frame the key tasks described in following column. Needs to be one goal per row.

Consider numbering each annual milestone. You might also use a separate column for numbering milestones, for easier filtering.

1.2 **Key tasks/Activities/Task-lists –** what initiatives or actions are required to achieve those goals? This column identifies the key sets of initiatives or actions aimed at achieving the annual goals laid out in the previous. These form the heart of the work plan, as these activities and their respective targets guide all actions as required to achieve the goals. Usually, multiple activities to accomplish the annual milestone. Only put a summarized task and not detailed steps for the task. The detailed subtasks should be managed separately in the project management/implementation tool such as zoho, Trello or another separate detailed spreadsheet. You can put additional notes in the notes column if the activity description is too long.

Consider numbering each activity in relation to its annual milestone number e.g., activities for milestone 1 could be numbered 1.1, 1.2, 1.3 etc. These can be used to reference activities, or milestones in the annual budget also while reporting. As well as in other detailed work plans if needed.

1.3 **Expected Outcomes -** what are the intended results of the actions being taken? Usually links with the annual milestone/goal. It can be helpful to think through what change the key task will bring and clarify how that change allows you to achieve your overarching goal. For example, if a key task is to develop a communications strategy, it is useful to think through how the outcome

will contribute towards achieving the goal of strengthening the WMA. These outcomes can sometimes be found in existing project level documents such as grant proposals.

Needs to be one outcome sentence per goal. Can be a compound sentence which comprises several outcomes caused by the activities in the milestone.

1.4 **Time-frames/Timelines –** when do things need to happen by? Can be specified by quarters (Q1 to Q4) or by months (Jan to Dec). For future implementation reporting, this column can be broken down into 4 (if quarterly) or 12 (if monthly). Can be one overall expected timeframe for the entire milestone or broken down per activities listed.

1.5 **Annual targets, deliverables or outputs –** what monitoring metrics will you use to verify delivery? Needs to be a bulleted list of outputs or deliverables expected to prove completion of the work and ultimately prove progress towards the organization's strategic goals. Other WMA documents such as grant proposals, strategic plans or monitoring plans may already have some of these metrics clearly defined. These deliverables can also be used together with financial reports as outputs to external funders or donors of the activities as part of justifying the completion of the agreed work.

Ideally one or more bullets for each of the listed activities in the milestone. In excel, press 'ALT+ENTER' to make a new line and consider using an asterisk '*' or minus '- 'symbol for each bullet.

1.6 **Notes –** Any additional notes and comments for the goal, milestones or activities (can be blank if no additional notes needed). It is helpful to use this column to explain activity description or intended outputs where it was not clearly stated in the previous columns (activity or deliverables columns).

## Additional optional columns;

- **Thematic area** – a column to categorize your annual goals/milestones into certain programmatic themes eg protection, management, governance, community livelihoods and awareness, tourism/enterprise development etc. This helps when you want to filter your programs or themes.

- **Responsible or lead** - who is accountable for different deliverables? Usually initials of a management staff responsible for the supervising implementation of the specific task. Does not have to all be assigned to the WMA manager but for instance tourism activities might be assigned to a tourism officer. It is a best practice to have only one lead. This column can also be used to indicate responsible/supporting organization for the activity.

- **Resources** – This column highlights the resources required to complete all activities in the respective annual goal/milestone. Can be split into several columns such as;

  - **Budget/Activity costs** – How much is needed to complete all activities under this annual goal/milestone? Can be a total of all activities under the annual goal or a breakdown for each of the listed activity items. Consider having a separate spreadsheet for a detailed budget that has referenced budget lines that matches the activity numbers in the work plan (see in the example spreadsheet). Also note that some budget cost items (especially the recurring ones such as staff salaries) might not be directly linked to activities in the work plan.

  - **Available budget/shortfall** – How much funds are already available for the planned activities under the respective milestone? or can show the shortfall instead.

  - **Expected donor** – Who or what organization (if any) is expected to fund the activity or the entire milestone

## Useful additional columns for future work plan progress reporting;

- **Status** – This column is the basic 'dashboard' status tool for a quick highlight of work plan progress reporting, which is changed and updated according to progress against the Key Tasks (or Activities) and its respective Annual Targets (outputs or deliverables). This can be updated monthly, or quarterly, as preferred by management. The column has both a color coding and letter explanation. Proposed status indicators includes;

  - **Not started** = activity not begun but on track as not yet scheduled to start (clear);

  - **In progress** = activity begun and progressing fully according to schedule (blue);

  - **Slightly off track** (or **minor issues)** = progress slower than anticipated or there was a slight delay in relation to the schedule (yellow);

  - **Delayed** (or **major issues**) = progress significantly impeded and requiring attention (red);

  - **Complete** = Activity fully complete, target met (green).

  - **Periodic updates note** – Space to comment on progress in terms of each annual goal (and its activities), and to explain the status of the key task in relation to its annual target. This basically explains the indicated status from the "Status" column. It is particularly helpful to provide notes for key tasks where the status dashboard shows the tasks are off track or seriously delayed in order to explain the reasons for the delay and what steps will be taken to address it. Consider adding a new column for each reporting period, for instance (**Q1 update, Q2 update, Q3 update** and **Q4 update**) if reporting quarterly or otherwise as needed.

The graphic below provides an illustrated example of our template for annual WMA work planning.

| SN | Annual goal [Milestones] | Thematic area | Activity [Tasklists] | Expected Outcomes | Timeline | Lead | Annual Targets and deliverables | Status | Notes and additional comments | Q1 Update |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | **2020 Annual Work Plan (Version 1.0)** | |
| 2.1 | Develop a capable WMA management towards sustainability through coaching and training. | Management | 2.1.1 Prepare the WMA management for MAT level 4 (+Management tool box) 2.1.2 Ongoing WMA leadership trainnings, formal coachings and feedback meetings. 2.1.3 Procure and maintain existing equipment+infrastructure to support WMA management functions 2.1.4 Review the WMA Business plan and 5-year Conservation Action Plan (CAP) | General the WMA management is moving towards sustainability (Decisions, Revenue & expenses mgt) | Q1-Q4 | SS | * Management toolbox (incl. report templates, asset registry, appraisal system, mgt flow chart). * Training+Coaching checklist * Monthly+Quarterly mgt meetings + coaching sessions * WMA succession plan for Honeyguide's Driver+Ops+AP staff * New Suzuki carry for office supplies, store, vehicle workshop, fuel storage station, solar repairs, Mgt/staff housing * Updated WMA business plan * New CAP | Not started | ..in Mgt coaching, incl.. how they can manage existing infrastructures. + Projects development fund + new investor contracts and relations | |
| 2.2 | Develop and test a WMA **governance capacity building** and monitoring **framework.** | Governance | 2.2.1 SAGE next steps (+internal governance assesment tool to measure SAGE improvement) 2.2.2 WMA governance capacity building trainings (Principles->Roles->Sust.->technical trainings) | Governance capacity building framework developed, tested, documented and can be replicated in other WMA | Q1-Q4 | SS | * Simplified internal governace assessment tool to be used by the WMA to track improvement. * WMA governance capacity building checklist * WMA governance capacity building reports of trainings. | In progress | Consider investing first in the new AA members and newly elected village leaders. | |
| 2.3 | Improve tourism experience in the WMA through infrastructures, services, marketting and investor affairs | Tourism | 2.3.1 Plan for underperfoming properties and get new investor in WMA 2.3.2 Improve accessibilty in the WMA 2.3.3 Develop WMA marketing strategy and tools 2.3.4 Improve Customer service in the WMA (relations and service) 2.3.5 the WMA cultural boma | WMA business plan targets achieved for 2020 | Q1+Q4 | MM | * Plan for underperfoming properties in WMA * New tourism property in the WMA * New game-drive roads, maintained existing roads, gates improvements, * WMA marketting strategy, Website update, waterhide complete, brochures, tourist feedback system, WMA story narrative for tourists * WMA tourism customer care training for VGS * Updated investor contracts * Improved cultural boma experience | Slightly off track | | |
| 2.4 | Improve local attitudes or the WMA communities and awareness about WMA, wildlife and conservation | Awareness | 2.4.1 Develop and test the WMA communication strategy + monitoring framework 2.4.2 Show the WMA awareness film to all villages and schools 2.4.3 Develop specific targetted WMA awareness materials (Annual report poster, sust. pillars films ...) | the WMA has a communication and awareness which incl. awareness monitoring framework | Q1-Q2 | LL | * WMA awareness and communications strategy. * WMA awareness monitoring tool for WMAs * Awareness film on WMA shown to all WMA villages * Film monitoring report | Delayed | | |
| 2.5 | Improve capacity of WMA to manage AP efficiently and take 100% of antipoaching cost. | Protection | 2.5.1 Review and enforce Antipoaching SOP 2.5.2 Update the WMA long-term anti poaching plan 2.5.3 Develop a stronger informer and inteligence system 2.5.4 Necessary AP equipment (vehicle, ...) | the WMA in charge all AP operations (incl. costs) as per long term AP strategy and SOP. | Q1-Q4 | LK | * Qtrly the WMA SOP monitoring, 100% on mandatory and 60% on optional standards by year-end. * Long-term AP plan for the WMA. * Monthly AP strategic plans with SMART. * Intelligence manual, intelligence training and training reports, and established intelligence networks * 100% of the protection cost covered by WMA. * New AP car | Complete | | |
| 2.6 | Develop long term future plan for WMA crop protection where the program is run without external support. | HWC | 2.6.1 WMA+communities funding 100% of HWC toolkits+monitoring costs. 2.6.2 HWC monitoring and reporting by WMA and communities. 2.6.3 Develop future HWC plan for the WMA which includes AA and villages. | WMA community understand and values the HWC initiatives and agree to take on toolkit purchase and monitoring going forward according to the aggreed future program plan. | Q1-Q3 | LM | * HWC toolkits needs assessment * Monthly crop protection reports showing incidents and toolkit usage * Communities and WMA collect and manage all data. * 2020 HWC report showing toolkits contributions, incidents and toolkit usage. * Future HWC plan aggreed by WMA, AA and villages. | In progress | | |

For more information you can access the template, which can then be downloaded and tailored to your organization's needs, at http://www.bit.ly/WMAworkplan.