

Workplan Template

Description:

This tool provides a template to use when planning the steps to create a Health and Wellness Plan.

How it can be used:

The process of creating a Health and Wellness Plan can take a long time, often from six months to two years, depending on the size and readiness of the organization. Creating a workplan to guide the process at the beginning of the process is essential to ensuring all the key steps are completed. Use the template within your planning group, to help plan out the steps and activities to create your Health and Wellness Plan.

As a planning group, you will need to create a workplan to guide the development of your Health Plan. This will ensure that as a group you discuss all the key steps, the specific activities, and the order in which they need to occur. Discussing this as a group also helps bring out other ideas or suggestions that can enhance the workplan.

This process doesn't have to take long, perhaps a few hours, but it is a critical step in your planning process.

NOTE: you are NOT creating the HEALTH AND WELLNESS PLAN here, but a plan to create the HEALTH AND WELLNESS PLAN. Essentially, the plan to create your PLAN!

1. On the first page (the timeline), write out your anticipated timeline dates in the arrow. Consider when you plan to have your Health and Wellness Plan finished. This date would be written at the right end of the arrow. Fill in the dates from the present date until the date you intend to be finished. This will guide the planning of your steps and activities.
2. Discuss as a group, the key steps required to fully develop the Health and Wellness Plan. Take the time to talk it through from beginning to completion. Write the key steps in the green shaded boxes of the timeline. Examples of these might be engagement activities, reports and data, data analysis, identify priorities, develop report, etc.
3. Once the key steps are defined, add the main activities that are in each key step. Write these in the white boxes underneath each key step. Examples of these under the key step of "engagement activities" might be focus groups, community survey, home visits, etc. You don't have to go into much detail here, as that will be covered in the workplan table.
4. On the workplan table, write each key step in the shaded green row (e.g., engagement activities). Then list the specific activities in the far left column. Fill in more detail than you have done on the timeline. For example instead of "focus groups", you might put "Elders' Focus Group". Then add the relevant details to help plan that activity.



Workplan Exercise

On the Timeline – Write the dates (specific dates, weeks, months... whichever works best for your workplan)

In the Green Boxes – Write in the key steps, such as community engagement, data analysis, etc. An example is shown.

In the White Boxes – Write in the main activities that are part of the key steps. Some examples are shown.

engagement activities				
<i>focus groups</i>				
<i>community surveys</i>				
<i>home visits</i>				





Using the key steps as a guide, expand upon the activities to outline all the actions required to complete each activity (including those not listed on the timeline). Add the person responsible for ensuring it is completed, when it needs to be done, what resources are requires (consider time, people, and infrastructure such as a kitchen, etc.) and any notes that help explain the activity.

Key Step:				
Activities	Who's responsible	Time line (start-end)	Resources required	Notes
<i>Elders' Focus Group</i>	<i>Health Dir.</i>	<i>Feb.6</i>	<i>Facilitator, food, room.</i>	<i>Get list of potential Elders. Confirm the Elders room is available. Ask Jane to facilitate. Arrange for food. Send out invitations 2 weeks in advance. Reminders 2 days in advance.</i>
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