ENDOWMENT *for* Health

Project Workplan Guidelines

Purpose and Use of a Project Workplan

The Project Workplan is a tool to help you plan, manage implementation of, report on, and evaluate your project. The project workplan has two components:

- the outcome workplan tables which describe each project outcome and how the project will be implemented to achieve the outcome, including inputs, activities, timeframe, responsible person, and outputs.
- the outcome evaluation plan tables which describe how you will evaluate whether each project outcome has been achieved, including outcome indicators and data collection methods and timeframe.

The Project Workplan will help you:

- to **plan** your project by outlining the activities to be accomplished, timeframes, and inputs needed, including how project results will be sustained. The Project Workplan will also help you to formulate your project and grant budget.
- to **manage** implementation of your project by enabling you to track implementation against expectations.
- to **report** on your progress in implementing the project by sharing information in the progress reporting column of the outcome workplan.
- to **evaluate outcomes** by identifying the indicators you will use to assess whether outcomes are achieved, the data collection methods and timeframe for collecting outcomes evaluation data, and by sharing evaluation results in the evaluation results column of the outcome evaluation plan.

The Endowment expects that the Project Workplan will reflect the scope of your project and the size of the grant for which you are applying. Smaller grants and projects of smaller scope and shorter duration require less detailed outcome workplan tables and outcome evaluation plan tables than larger, multi-year grant requests.

Creating a Project Workplan

Using the Project Workplan Template

The workplan template can be modified to include as many outcome tables as your project requires. For *each* outcome in the Project Workplan, create an outcome workplan table *and* an evaluation workplan table. In the outcome workplan table:

- Type each activity in a separate row.
- Arrange activity rows chronologically by the start date of the activity.
- To highlight the activities to be funded by the Endowment grant, *italicize the activity rows*.
- Add as many rows as needed.
- For multi-year grant proposals, create one workplan that spans all project years.

In the outcome evaluation plan table:

- Identify different outcome indicators and data collection instruments and timeline using bullets.

Required Content of a Project Workplan

A Project Workplan must include all of the following elements. Definitions of these elements follow this section.

- All project **outcomes**.
- A distinct outcome and supporting activities to assure **sustainability** for the project, if the project is expected to be sustained beyond the grant period.
- All project **activities** (including inputs, time frames, responsible persons, and outputs), *with activities to be funded by the Endowment highlighted with italics***.**
- **Outcome indicators** that will help measure whether or not project outcomes are achieved and **data collection methods and timeframe** to be used to obtain the data.

  NOTE: The Endowment believes that extensive thinking about outcome evaluation is best done after a grant is awarded. Therefore, during the grant proposal stage, please share some *initial* thinking about how you will evaluate your project's outcomes. If a grant is awarded, you will be asked to finalize your outcome evaluation plan tables and Endowment staff is available to support you in this work.

Note: the **progress reporting** column in the outcome workplan tables and the **evaluation results** column in the outcome evaluation plan tables are for reporting to the Endowment *after* a project is implemented. They are *not* completed in the proposal stage.

Project Workplan Definitions

The following terms are used in the Endowment Project Workplan template and samples.

activity

How a project uses its inputs to achieve outcomes.

For example: Identify a consultant to develop the training curriculum.

data collection method and timeframe

How information for an outcome indicator is collected.

For example: surveys, interviews, focus groups, observation, document review, and tests.

The timeframe identifies when and how often indicator data are collected.

For example: quarterly, once a semester, at start of project and end of project.

When thinking about timeframe, consider both what is reasonable in terms of both when you expect to see change in outcomes and what is realistic in terms of data collection workload. In some cases, it will make sense to collect data about outcomes early in the project (often called "baseline data") to enable you to show the change over the project period.

evaluation results

Description of progress, including data, in achieving outcomes as measured through outcome indicators. Evaluation results are submitted with interim (if results are available) and final progress reports to the Endowment. This column is left blank during the proposal process.

inputs (resources)

The resources needed to implement a project activity and achieve project outputs.

For example: staff, consultants, volunteers, new technology, new equipment, and supplies

outcome

Outcomes express the *results* that your project aims to achieve if implemented as intended. Outcomes answer the question: “What *difference* will the project make?” These differences are often expressed in terms of changes in learning, action or conditions of individuals, families, households, organizations, or systems.

- *Outcome:* Increase the capacity of medical providers to conduct social/emotional screenings of young children
- *Outcome:* Program participants will demonstrate lifestyle behavioral changes that decrease medical risk factors for Type 2 Diabetes.
- *Outcome:* The general public will understand how early relationships create the foundation for physical and mental health.

Outcome statements are measurable; that is, one should be able to evaluate whether or not the outcome was achieved.

outcome indicator

An indicator is the quantitative or qualitative measure(s) that tells you whether you have accomplished your outcome. Indicators are measurable and observable and answer the question: How will we *know* it? Some find it helpful to think about indicators as the “evidence” that outcomes are or are not being achieved. Outcomes may have more than one indicator. Where appropriate and possible, you should also identify a numeric target for your indicator. However, the Endowment recognizes that setting numeric targets can be difficult. Therefore, these targets may require revision as your project is implemented. Examples of outcome indicators are:

- *Outcome:* Increase the capacity of medical providers to conduct social/emotional screenings of young children
  Outcome Indicator(s):
  - At least 24 medical providers trained
  - 80% of providers conduct screenings
- *Outcome:* Program participants will demonstrate lifestyle behavioral changes that decrease medical risk factors for Type 2 Diabetes
  Outcome Indicator(s):
  - 80% of participants maintain 150 minutes of activity per week.
  - 65% of participants decrease and maintain their body weight by 7% or more.
- *Outcome:* The general public will understand how early relationships create the foundation for physical and mental health
  Outcome Indicator(s):
  - At least 70 people attend community lecture
  - 80% of participants report that their knowledge has increased
  - Local media produces at least one story on the event

NOTE: During the grant proposal stage, please share some *initial* thinking about your outcome indicators and data collection. If a grant is awarded, you will be asked to finalize your outcome evaluation plan tables.

output

A direct, tangible, and measurable product of a project activity. An output is usually expressed as a number of units delivered. See also, “outcome”.

For example: 5 classes held, 3 outreach materials developed, 200 participants served, 300 hours of service provided, and 6 focus groups held.

progress reporting

Description of progress in implementing project activities and achieving project outputs submitted with interim and final progress reports. This column is left blank during the proposal process.

project goal statement

A broad, general statement about what you hope to accomplish with your project and how you plan to do it. There are two parts to a project goal statement: a "to" part, and a "by" part. The "to" part refers to what you hope to accomplish in the project relative to the target population; the "by" part summarizes the activities you will undertake in order to accomplish your project goal. A project goal statement should also include any systemic change to be achieved by the project.

For example: *To* improve access to health care for people with limited English proficiency (LEP) in the service area *by* creating sustainable systems to 1) train medical interpreters and health professionals in cultural competency and the use of medical interpreters, and 2) provide outreach and education to health care consumers about medical interpretation.

responsible person

The person who uses the specified inputs to achieve specified anticipated outputs within a specified time span.

sustainability

The ability of the health improvement outcomes of a project to continue beyond the Endowment grant period without further Endowment funding. This may involve locating new sources of funding, working to improve reimbursement systems, and/or integrating the work of the project into existing health systems.

time frame

The start date and end date of the period during which an activity will occur. Use *mm/yy – mm/yy* format.