

CREATING AND USING ACTION-ORIENTED WORK PLANS

Sara Wittenberg

Executive Director – Alberta Main Street

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SESSION DESCRIPTION

Work plans are tools that no program should be without! Effective work plans save time, money, and headaches for your board of directors, committees, and staff. Take a look at the who, what, when, where, and why of work plan development.

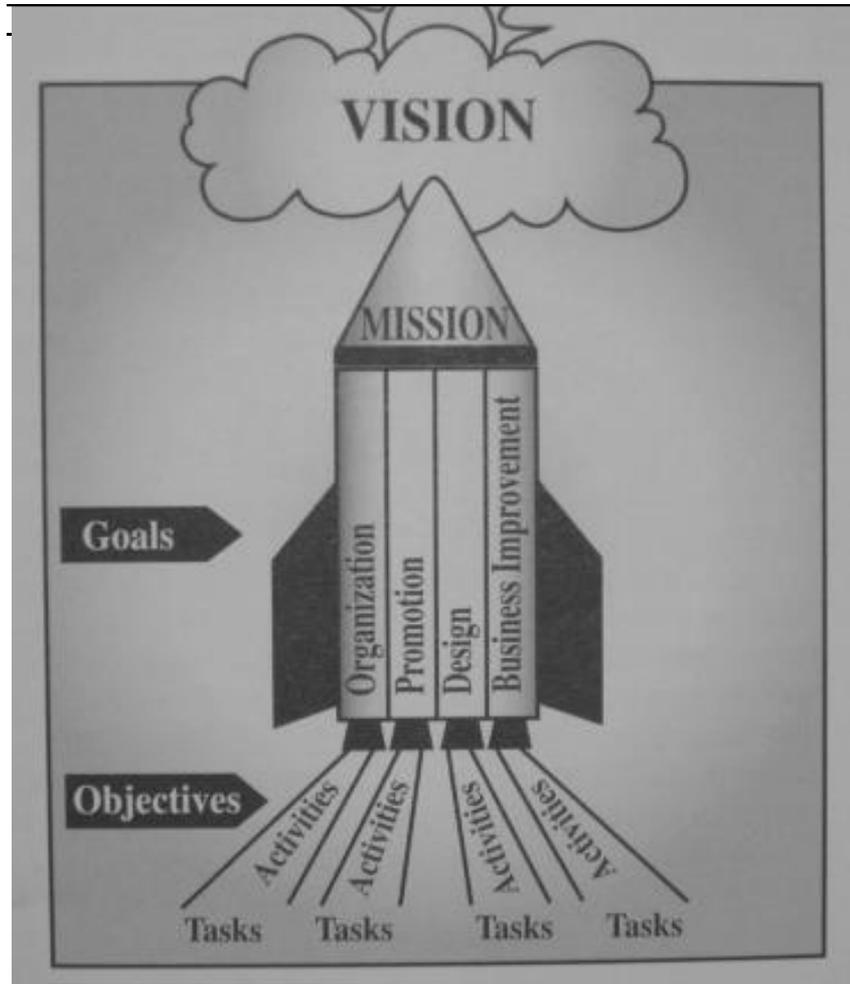
This session will convince you (hopefully) that a user-friendly work plan can be your greatest asset.

SESSION AGENDA

- WHY?
- WHAT ?
- WHO, WHEN & HOW?
- PRACTICE MAKES PERFECT
- QUESTIONS/COMMENTS

WHY ?

MISSION & VISION FULFILLMENT



STAYING ON TRACK

- VISION
- MISSION
- GOALS
- OBJECTIVES
- TASKS

CONNECTING THE DOTS



GOALS & PRIORITIES

[ALBERTA MAIN STREET EXAMPLE] OVER ARCHING GOAL: EQUITY

DESIGN

ORGANIZATION

PROMOTION

BUSINESS
DEVELOPMENT

EQUITY

BOARD

GOAL: Ensure the equitable distribution of our resources and benefits.

PRIORITIES & TASKS

- Increase the number of property owners and business owners that receive district financial resources for projects. Review mini-grant application, overview and outreach plan to identify if/where there are opportunities to make more accessible.
- Explore utilizing future district improvement grant funds on historical/equity focused project.
- Inventory community organizations, groups, churches, and schools that do not have a strong/any relationship with AMS. Prioritize identification of organizations that engage low-income, minority, and immigrant business owners and residents within the area.
- Formalize “look local first” policies for AMS spending.
- Evaluate participation at events. “Who attended? Who participated most actively? Who benefited?” Also ask: “Who did not?” As patterns and themes emerge, develop and implement plans to broaden participation over time.
- Review bi-annual business owner survey data collected regarding interest/intent to make improvements to space or building.
- Meet and build relationships with community and economic development organizations/service providers representing target populations.
- Have local historian present to board, staff and volunteers. Use existing Seminar Series and/or Race Talks
- Review mini-grant reviewer score sheet with an equity lens and provide feedback to design committee.
- Follow up with business and property owners who attend the mini-grant informational meeting prior to the application deadline to offer assistance and/or answer any questions.
- Develop a mentor program for new Board members and committee chairs and clear leadership orientation materials.
- Review Board matrix & identify gaps in role distribution & equitable representation regarding stakeholders (business/property owners, residents, etc.), age, race/ethnicity, and skills/interests.
- Identify 2-3 community members with a strong, authentic relationship with AMS, who will bring needed experience, skills, or community voice and who will represent the organization effectively.

MAINTAIN YOUR SANITY



- Project management
- Partnership development
- Volunteer recruitment & management
- Evaluation
- Budgeting & fundraising
- Record-keeping
- Scope management

SCOPE MANAGEMENT

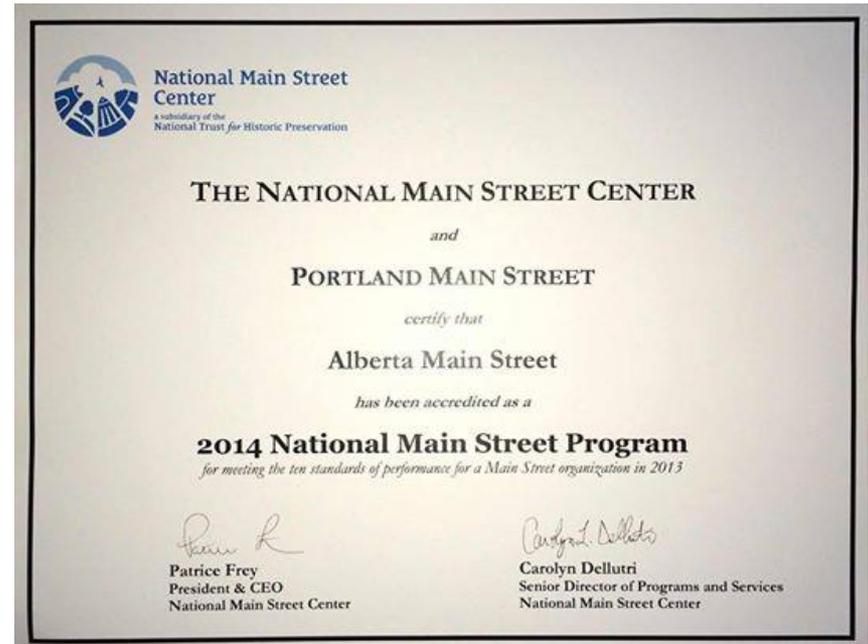
- Do not add activities unless they fit the program's purpose.
- Do not attempt projects for the wrong reasons: because a grant is available, because an activity will put someone on the payroll, because the project will generate publicity, etc.
- Evaluate each proposed activity to be sure it meets the program's goals and vision for the district.
- Learn to say no or put suggestions on a list for future action.
- Don't be so rigid that you turn down good opportunities when they come along, but make sure that your program can handle any changes in the agenda and that they are made for sound reasons.

MEET ACCREDITATION STANDARDS

The National Trust Main Street Center Says So...(From the National Accreditation 10 Standards of Performance)

Standard 3. Has a comprehensive Main Street work plan.

A comprehensive annual work plan provides a detailed blueprint for the Main Street program's activities; reinforces the program's accountability both within the organization and also in the broader community; and provides measurable objectives by which the program can track its progress.



WHAT ?

WHAT IS A WORK PLAN?

A Work Plan is a tool to break down the goal setting process into smaller, more actionable steps.

WORK PLAN COMPONENTS

- Goals
- Objectives
- Projects
- Tasks
- Timetable
- Responsibility
- Budget
- Measure of Success

ONE EXAMPLE

Alberta Main Street **WORK PLAN BLANK**

Page ____ of ____

- Design
 Business Development
 Organization
 Promotion
 Equity
 Board

Priority Goal & Objective:			
Chair/Person Responsible	Phone:	Email:	
Project Team Members:			

Project:					Anticipated Completion Date:			
Tasks	Who	Potential Partners	Deadline	Est. Expense	Est. Revenue	Vol Hours	Staff Hours	Completed
Total Anticipated Resources								

Comments & Notes	
Anticipated Result/Measure of Success	

REAL LIFE EXAMPLE

Alberta Main Street **WORK PLAN EXAMPLE**

Page ____ of ____

Design Business Development Organization Promotion Equity Board

Priority Goal & Objective:	Resources provided by AMS, for both capital projects and business programs, reach a diverse group of community members, businesses, and property owners.
Chair/Person Responsible:	Jonnie Ling
Project Team Members:	Jennifer, Meagan and Ranjit [Primary staff support: Sarah Staben]

Project: Increase the number of priority populations (minority owned business/property owners and long time property owners) that receive AMS matching mini grants.					Anticipated Completion Date: 6/30/2015			
Tasks	Who	Potential Partners	Deadline	Est. Expense	Est. Revenue	Vol Hours	Staff Hours	Completed
Review definition of priority populations	Jonnie		10/16/2014			1	.5	
Review Design Committee mini grant work plan at October meeting	Team	Design	10/16/2014					
Identify and reduce barriers to participation in mini grant program.	Ranjit	OAME, MESO	11/20/2014			3	.5	
Evaluate barriers and need to provide child care during informational meetings	Jonnie		11/20/2014	\$50 (potential)		2	1	
Review/update program description & application to identify if/where there are opportunities to make more accessible.	Meagan	MESO	11/20/2014			3	2	
Review score sheet w/an equity lens. Provide feedback to design committee.	Ranjit	MESO	12/18/2014			1	1	
Attend Design committee meeting to review outreach plan.	Jonnie	Design	12/16/2014			.5		
Conduct targeted outreach to priority populations.	Team		1/15/2015			20	5	
Follow up with business/property owners prior to the application deadline to offer assistance and/or answer any questions.	Team		1/31/2015			10	5	
Total Anticipated Resources				\$50	\$0	40.5	6	
Comments & Notes								
Anticipated Result/Measure of Success	30% of mini grant awarded to priority populations							

ONLINE TOOLS

- Basecamp (\$20/month) – basecamp.com
- activeCollab.com (paid-nonprofit discount)
- Wunderlist (free & \$9 option) – wunderlist.com
- SO Planning (free) – soplanning.org
- Wrike (free & paid options) - wrike.com
- Asana (free & paid options) – asana.com
- Zoho (free & paid options) - zoho.com
- Others?

BASECAMP

[Back to Dashboard](#) | [Switch to a different project](#)

[Project Settings](#) | [My info](#) | [Sign out](#) **HELP**

Promotions Alberta Main Street

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[See all to-do lists](#)

[Delete this list](#)

2014 Earth Day District Clean Up

Saturday - April 26, 2013 Alberta Central Courtyard

[Add an item](#)

- May 4 Identify 2-3 volunteers to act as 'runners' on the day of event
- May 4 Raffle tickets for Golden Garbage Awards
- May 4 Update clean up grid/plan
- May 4 **Update & print liability waivers for volunteers** (Sara Wittenberg)
- May 4 **Identify & solicit Golden Garbage Awards raffle prizes** (Sara Wittenberg)
- May 4 Create agenda for Golden Garbage Awards and secure emcee. Stacey & Bill.
- May 4 Identify 6 quadrant leaders (Stacey, Bill, Allison, Kyle, John B.) - need one more.
- May 4 ID day of clean up needs (dumpsters, gloves, brooms, etc.)
- May 4 Identify and coordinate with photographer (Angie Heiney)
- May 4 Write & distribute press release
- May 4 Contact Beaumont Hardware for donations (Angie Heiney)
- May 4 Contact Hankins Hardware for donations (Angie Heiney)
- Apr 2 Identify 3-4 volunteer so staff volunteer check in: Jaye, Karen, Liz, Amber
- Apr 2 Recruit via Neighborhood Assn partners (Amber Turner)
- Apr 2 Other outreach: Hands on Portland Outreach, College/Universities/Scouts, etc. (Amber Turner)
- Apr 2 Price, design & purchase (if funds are available) volunteer recognition items (Liz Grottyhann)  1
- Apr 2 Coordinate garbage/dumpster/truck (Nancy Flynn)

...v. Amber Angie: 10-15th. Jaye: 15-20th. Nancy 20 - 25th. Bill 25th-30th.  2

Show to-dos assigned to

Anyone 

Show to-dos that are due

Anytime 

Current to-do lists

[2014 Tree Lighting](#)
[2014 Trick or Treat Alberta Street](#)
[Aaron Trotter's Illustrated Art Card Deck for Alberta Street](#)
[Alberta wide event - shop, eat, etc today and benefit AMS](#)
[Promo Video](#)
[General Branding & Promotion for Alberta Main Street](#)

Completed to-do lists

[2011 Earth Day District Clean Up](#)
[2012 Earth Day District Clean Up](#)
[2012 Sidewalk Sale](#)
[2012 Tannenbaum Madness](#)
[2012 Trick or Treat Alberta Street](#)
[2013 Earth Day District Clean Up](#)
[2013 Holiday Events](#)
[2013 Sidewalk Sale](#)
[2013 Tree Lighting](#)
[2013 Trick or Treat Alberta Street](#)
[2014 Earth Day District Clean Up](#)
[2014 Sidewalk Sale](#)
[Business Clustering](#)
[Co-op Advertising](#)
[Design Window Decal](#)
[Develop Website](#)

WHO, WHEN & HOW ?

WHO?

- Board Members
- Staff
- Committee Volunteers
- Prospective Volunteers
- Key Stakeholders



It should not just be the Main Street Manager!

WHEN?



- Typically 4-6 months prior to end of program or fiscal year.
- Work plans typically cover 12-18 month period.

HOW?

- Annual work plan development meeting/workshop
- Other options you use?



PRACTICE MAKES
PERFECT

PRACTICE EXERCISE

GOAL: Increase the number of community members shopping downtown.

PART I: Idea generation

On your own take five minutes to brainstorm projects that may help our community reach this goal.

Write down ideas related to **any committee**. Be sure to consider the following:

- Can it be completed in 12-18 months?
- Is it important?
- Will it have measurable results?

PRACTICE EXERCISE

GOAL: Increase the number of community members shopping downtown.

PART II: Committee Delegation

As a group take 5 minutes to discuss your ideas and any others you come up with.

Identify which committee would most likely tackle this project and write a concise description on the respective flip chart paper around the room.

PRACTICE EXERCISE

GOAL: Increase the number of community members shopping downtown.

PART III: Voting

Individually vote for your top three project ideas across all committees that you believe will help us reach our goal.

PRACTICE EXERCISE

GOAL: Increase the number of community members shopping downtown.

PART IV: Work plan development work sheets

Based on the projects generated by the group (not just one community) committees can now identify how many of the projects can realistically be done in the coming year. This may be one project or it may be eight projects depending on the magnitude of the projects and the resources (volunteers, money, etc.) available.

THANK YOU!

QUESTIONS?

Sara Wittenberg, Executive Director
Alberta Main Street
1722 NE Alberta Street
Portland, OR 97211
sara@albertamainst.org
(503) 683-3252

www.albertamainst.org
Facebook: albertamainstreet
Twitter @albertastreet
Instagram @albertastreet