



Carnegie Mellon University

**Designing Measurable
Expected Outcomes
&
The Work Plan**

Problem, solution, activity, etc.

Problem /
Opportunity

Solution /
Approach



Phase	Expected Outcome / Milestone	How to Measure	Current Measure	Evidence of Change

E.g. Board Communications

- Opportunity:
 - Improve board of director governance by increasing communication among board members and management team.
- Tie to mission:
 - Improved fundraising, clearer policies, expanded programs, quality new hiring, and better budgeting directly effect the health of the organization and its ability to carry out its mission in the long term.
- Solution:
 - Provide a board web site as a nexus for board communication.

Phase	Expected Outcome/Milestone	How to Measure	Current Measure	Evidence of Change
Design site	A site design using good design principles, involving the CP in all stages of the design.	Design exists CP satisfaction CP designed parts	No design exists Nada Nada	Design document, storyboard CP says excited CP did sections
Implement site	A well-working site	IP ownership Web hosting service Site existence Site completeness Site robustness	No site IP name registered No web hosting service	Web host contracted Site exists 30 pages of info, 20 events, 10 files uploaded "Attractive look" All links work All programs described
Develop capacity to maintain site	CP or designated staff can maintain and sustain the site	CP add, modify, delete pages Backup plan Backup practices Budget for web hosting and IP name registration 2nd tier support plan	Cannot edit No backup plan No budget No 2nd tier support plan	Added 10 pages Modified 3 pages Deleted 2 pages as an exercise Budget created for IP name registration and web hosting service Names of consultants for periodic updates and 2nd tier support in-hand
Build board capacity to use site	Board routinely uses the site to communicate and govern the organization	Board satisfaction # accesses # files uploaded # calendar events Frequency of updates Weak: board trained	none	"excited" 100 hits / week 30 files downloaded Check calendar once every 3 days on average
Improve board communication	Improved fundraising, clearer policies, expanded programs, quality new hiring, and better budgeting	Fundraising revenue Rate of policy change Hiring satisfaction Budget accuracy	Revenue level Time to revise policies Time to hire new staff Budget accuracy	Increased fundraising revenue New policies Quality new staff retained Lower budget variance

The function of a Work Plan

- Provides a blueprint for everyone to follow.
- Tests whether the work can be accomplished.
- Becomes a tool for managing the project.
- Reveals critical paths and potential barriers.
- Serves as a contract for everyone involved.
- Forces you to reconsider and refine the Proposed Scope of Work.

Your experiences

- Have you done work that was guided by a work plan (or project plan)?
 - When?
- Have you created a work plan?
 - When?
- What tools did you use?

Work plan elements

- What do you need in a work plan?

Work plan elements

- Phases
 - Organization of tasks into meaningful units of work.
- Milestones
 - pieces of work that is completed, deliverables.
- Tasks
 - Detailed steps / activities.
- Schedule
 - Timeline with dates
- Accountability
 - Who is responsible for what.
- Resources
 - What's needed, and when.
- Dependencies
 - What has to happen before other things can happen.

Work Plan Appearance

- What does a Work Plan look like?
- What tools can I use
 - A simple Excel spreadsheet is adequate
 - If you use another tool, be sure the output can be shared (e.g. .PDF)

For Our Purposes

- Simple — easy to read and understand.
- Enough detail to anticipate problems and see if adequate time is allotted.
- Community Partner can use it.
- Easily modified and updated.
- Can be incorporated into a report.

Common Pitfalls

- Forget to identify who is responsible for each activity.
- Dependency relationships between activities are not noted. If one piece is behind schedule, what is the effect on other scheduled pieces of work?

Common Pitfalls

- Resources are not identified. Often get into a project and only later realize that certain resources are needed which can lead to major delays.
- Underestimate the amount of time it takes to complete tasks.
- Overestimate the size of project required for this class.

Show examples

- PAAR example
- HDS example

Group exercise

- Form groups of 3
- Draft a Work Plan from the Expected Outcomes chart

Small group exercise

A. Problem: Client data kept on sheets of paper and Excel database results in lost data and wasted staff time doing analysis.

Solution: Deploy an open-source client data management system.

B. Opportunity: Improve a teenage mentoring program by using new communications options.

Solution: Create capacity for program to support regular communications between students and mentors via Skype.

Tasks for each group:

- Define expected outcomes
- Create a work plan

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Report back:

- What did you learn from this exercise?

