HFSF Work Plan Development Guide

The Health Foundation requires a **Work Plan** as part of its application process.

A **Work Plan** serves as a road map for your project. A well-prepared Work Plan should function as a stand-alone document, providing a clear understanding of what your project will accomplish without needing to reference the proposal narrative.

The Work Plan includes two types of objectives:

- **Process Objectives:** These describe **activities** that will be completed during your project or are essential for achieving your project goals.

- **Outcome Objectives:** These outline the results or changes your project (or its Process Objectives) aims to achieve.

Outcome Objectives must always include **quantifiable targets** to measure results, whereas Process Objectives may include **quantifiable or qualitative targets**, depending on the nature of the activity. For example, activities like hiring staff or completing a plan are best captured as qualitative targets, while activities involving outputs (e.g., the number of events held) should include quantifiable targets.

To ensure clarity and effectiveness, all objectives should meet the following criteria:

- **Specific**: Clearly defined and focused.

- **Measurable**: Quantifiable to assess progress.

- **Achievable**: Realistic given the scope and resources.

- **Relevant**: Directly related to the project goals.

- **Time-bound**: Includes a defined timeframe for completion.

As part of your Work Plan, you are required to provide details for each objective, including:

A. **Outcome:** A high-level goal or measurable result that summarizes what is intended to be achieved. The outcome should be concise and focused, clearly highlighting the specific improvement or change.
Example: Increase clinic visits.

B. **Description:** A detailed statement that provides context for the outcome, specifying the exact action, target, or purpose. The description should break down the broader outcome into specific, measurable elements. It should clarify what success will look like and include relevant details such as timelines, baselines, and targets.
Example:
- Increase clinic visits from 1,000 visits per month to 1,200 visits per month by the end of the reporting period.

C. **Objective Type**: **Process** or **Outcome** based on the definitions provided above

D. **Baseline**: The baseline is the **starting point or initial conditions** before the project begins. It provides context for measuring progress and helps determine the level of change or improvement achieved

- The baseline could be **zero** if nothing currently exists (e.g., a new program or service).

- Alternatively, it could be a **number representing the current state** that serves as the initial point for comparison. **Example:** If the objective is to "increase clinic visits" and the clinic currently receives **1,000 visits per month**, the baseline would be **1,000 visits per month**. This baseline serves as the point of reference to measure progress toward the target (e.g., increasing to 1,200 visits per month).

- For purely qualitative process objectives, input **0** as the baseline to represent the absence of the process or activity being tracked (e.g., "0" caseworkers or "0" plans completed).

E. **Overall Target**: The target is the desired outcome or measurable goal you aim to achieve by **the end of the project period**, defined in relation to the baseline. It represents a specific **numerical** endpoint to evaluate progress, measure change, or make comparisons.
Example:

If the objective is to "increase clinic visits *by 20%*"(*) and the clinic currently receives **1,000 visits per month**, the baseline would be **1,000 visits per month** and the target should be stated as **1,200 visits per month**.

- For purely qualitative <u>process objectives</u>, input **1** (or the appropriate number) as the target to represent the completion of the activity or process.
  Example:
  - **Baseline**: "0" caseworkers hired
  - **Target**: "1" caseworker hired by Month 3

(*) Please identify both the baseline and the target in **actual numbers** rather than percentages.

F. **Measurement**: The method or metric used to track progress and evaluate whether the target has been met. For example, if the target is to "increase clinic visits by 20%," the measurement could be **the number of patient visits recorded in the clinic's electronic health records (EHR) during the reporting period.**

G. **Timeframe**: The timeframe specifies when the objective will begin and end **within the project period**, and should be defined in 6-month intervals, as this aligns with the Health Foundation's standard reporting schedule for progress tracking. Objectives may start later than Month 1 and finish before the project period ends, depending on the scope of the objective.
- If your project duration is **24 months**, the timeframe would be divided as follows:
  - **Months 1–6**
  - **Months 7–12**
  - **Months 13–18**
  - **Months 19–24**

- For objectives covering the **entire project period**: Use the full duration (e.g., Month 1 – Month 24).
- For objectives **specific to a certain timeframe**: Indicate the relevant start and end months within the 6-month intervals (e.g., Month 13 – Month 18).

Note: The timeframe will guide progress tracking during the specified intervals, ensuring alignment with the overall target or portion of the target tied to that objective.

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If you have questions or need assistance, feel free to reach out to your Program Liaison for guidance.