

Checklist for Aligning the Annual Workplan with the Strategic Plan

Each year in mid-November, your annual workplan for the next project year is due. Your workplan is the major component of your Continuation Application (see timeline below). This checklist will help you align your annual workplan with your five-year strategic plan.

DASH will **not** collect this checklist. It is your option to use or not to use it. It is designed to help you write a strong workplan.

After filling out the checklist, examine those elements you did not complete and consider whether completing them would strengthen your workplan and help your agency make progress in reaching desired outcomes.

1. Gather materials related to program planning and progress.¹

- Strategic plan narrative
- Five-year program logic model
- Prior year workplan
- Prior year annual report
- Current year progress report
- Prior year project officer technical review(s)
- Program evaluation data
- Other new data (e.g., vital statistics, health and education data)
- School Level Impact Measures (SLIMs)

2. Review your strategic plan narrative, five-year program logic model, and SLIMs.¹

- List your program's five-year goals and program strategies.
 - Tool: *Worksheet for Reviewing Your Strategic Plan*
- Identify the strategic plan implementation timeline.
 - Tool: *Worksheet for Reviewing Your Strategic Plan*
- Identify the work described in your strategic plan's communication, implementation, and evaluation processes.
- Examine the SLIMs your program selected.

¹ Consider involving key stakeholders in this step of the process.

3. Assess your program's progress in implementing the strategic plan during the last year.

- Identify the objectives in last year's workplan that your program did not achieve. Indicate why objectives were not met and how your program plans to proceed.
- Determine whether your program's strategies were addressed during the last year, based on the timeline for implementing your strategic plan.
 - Tool: *Worksheet for Reviewing Your Strategic Plan*
- List the program evaluation and other data sources used to assess your program's progress during the last year and document the implications for next year's workplan.
 - Tool: *Worksheet for Reviewing Your Annual Data*
- Document the degree to which your program performed the activities in your communication, implementation, and evaluation processes during the last year.

4. Determine what your program intends to accomplish during the next year.

- Identify the strategies your program will implement during the next year, based on the data examined and your program's progress.
 - Tool: *Worksheet for Reviewing Your Strategic Plan*
- Discuss the SMART objectives your program will need to implement next year's strategies.
- Review the SLIMs your program selected to address the next year and the strategy (or strategies) that will address them.
- Identify the work you planned for the next year in your communication, implementation, and evaluation processes.

5. Write your new workplan, using the 801 Workplan Template.

- State the five-year goals in your workplan exactly as they are written in your strategic plan.
- State the strategies you plan to implement in your workplan exactly as they are written in your strategic plan. List only the strategies you plan to implement during the next year, based on your strategic plan implementation timeline and your review of program progress.
- Develop SMART objectives that will align with five-year goals, strategies, and SLIMs, where appropriate.
- Ensure that the communication, implementation, and evaluation processes proposed in your strategic plan are reflected in your workplan.

Tools & Resources

The 801 workplan template can be found on the 801 Tools and Resources Web page of the DASH Funded Partner Site at:

http://www.cdc.gov/dash/program_mgt/801_resources.htm

The Strategic Planning Kit; Strategic Planning Example, including Narrative, Logic Model, and Workplan; and Strategic Planning Graphic can be found at:

http://www.cdc.gov/healthyouth/evaluation/sp_toolkit.htm

Evaluation Brief 5: Integrating the Strategic Plan, Logic Model, and Workplan

<http://www.cdc.gov/HealthyYouth/evaluation/pdf/brief5.pdf>

Evaluation Brief 3: Goals and Objectives Checklist

<http://www.cdc.gov/HealthyYouth/evaluation/pdf/brief3.pdf>

Evaluation Brief 3b: Writing SMART Objectives

<http://www.cdc.gov/HealthyYouth/evaluation/pdf/brief3b.pdf>

Timeline for the Continuation Application and Related Documents (Years 3–5)

| | <u>Due Date</u> |
|--|-----------------|
| Year 3 Continuation Application Due (3/1/2010 – 2/28/2011) | 11/16/2009 |
| ✓ Year 3 Workplan | |
| ✓ Revised Logic Model (as appropriate) | |
| ✓ Revised Strategic Plan (as appropriate) | |
| Year 4 Continuation Application Due (3/1/2011 – 2/28/2012) | 11/15/2010 |
| ✓ Year 4 Workplan | |
| ✓ Revised Logic Model (as appropriate) | |
| ✓ Revised Strategic Plan (as appropriate) | |
| Year 5 Continuation Application Due (3/1/2012 – 2/28/2013) | 11/14/2011 |
| ✓ Year 5 Workplan | |
| ✓ Revised Logic Model (as appropriate) | |
| ✓ Revised Strategic Plan (as appropriate) | |