



# Developing Your Project Work Plan



# Welcome!

## Introductions

*Please share in the chat your name, organization, and what environmental issue your project is addressing*



# Webinar Agenda

- Definitions
- Alignment of Overall Project Materials
- Required Work Plan Components
- Suggested Work Plan Template
- Process for Developing Your Work Plan
- Questions

# Poll Time!

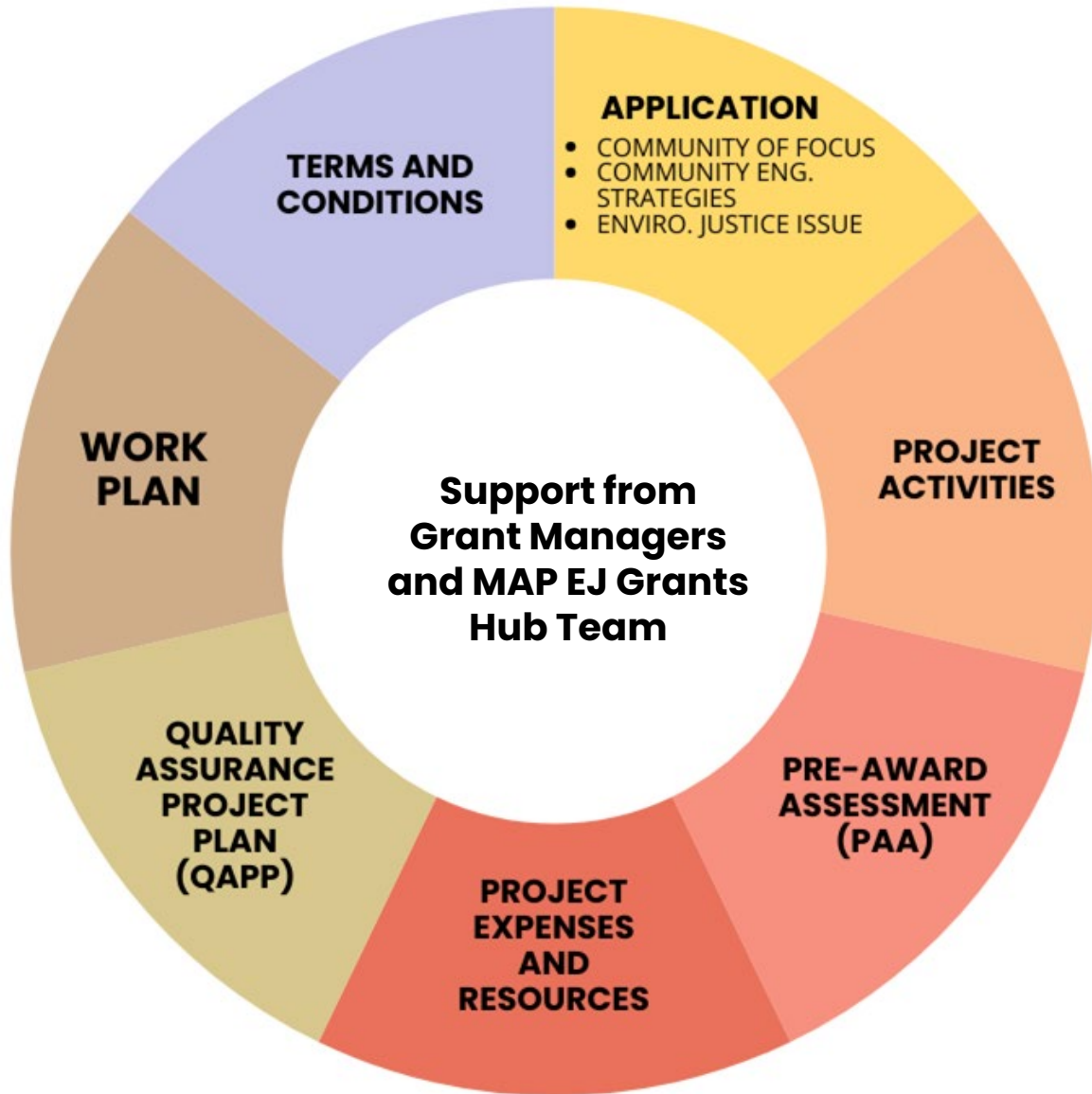
How would you rank your experience with developing Project Work Plans?

1. No experience
2. A little experience
3. Some experience
4. Project Work Plan Jedi Master

# Definitions

**Work Plan:** An action plan, blueprint, or roadmap that includes project tasks, timeframes, and deliverables, designed to create a visual reference for team members.

**Project Plan:** This is a more comprehensive tool that can help to further define project details and tasks and help to track performance metrics. *\*This is not required.*



How Does It All Fit Together?

# Required Work Plan Components

- General Project Information
- Project Purpose
- Project Goal
- Objectives
- Tasks
- Timeframes
- Organization / Person Responsible
- Status Updates
- Potential Obstacles and Mitigation Strategies
- Communication Plan

# Additional Work Plan Components

- \* *Outcomes*
- \* *Needed Resources*



# Suggested Work Plan Template

## MAP EJ Grants Hub Template Work Plan

In the first quarter of a TCGM grant award, each grantee will work with their Grant Manager to complete a project work plan. If the grantee has an existing work plan in place, it can be submitted to their Grant Manager for review if all necessary information is included. If that plan is approved by the Grant Manager, it is not necessary to complete this template.

**Project Name:**

**Grantee Name:**

**Date:**

**Version:**

**Community of Focus:**

**Environmental Justice Issue being addressed:**

**Project Purpose Statement:**

# Suggested Work Plan Template

Tasks	Deliverables	Organization / Person Responsible	Timeframe
Objective 1:			
1.1			
1.2			
1.3			
1.4			
Objective 2:			
2.1			
2.2			
2.3			
2.4			
Objective 3:			
3.1			
3.2			
3.3			

# Suggested Work Plan Template

<b>Potential Obstacles and Mitigation Strategies</b>	
<u>Potential Obstacle</u>	<u>Mitigation Strategy</u>
1.	1.
2.	2.
3.	3.
4.	4.
<b>Communication Plan:</b>	

# Suggested Work Plan Template

Tasks	Deliverables	Status Updates (include any challenges and mitigation strategies)
Objective 1:		
1.1		
1.2		
1.3		
1.4		
Objective 2:		
2.1		
2.2		
2.3		
2.4		
Objective 3:		
3.1		
3.2		
3.3		

# General Project Information

- Project Name
- Organization
- Date
- Version

# General Project Information Example

- **Project Name:** A Source of Life and Light (SOLL)
- **Organization:** Bright Futures
- **Date:** 4/2/2025
- **Version:** 1

# General Project Information

- Community of Focus
  - Who is being disproportionately affected? What specific communities will your project focus on?
- Environmental Justice Issue
  - What disproportionate negative environmental harms is your Community of Focus experiencing?
  - What do these environmental consequences result from?
  - How do these issues relate to Climate Change?

# General Project Information Example

- **Community of Focus**
  - Local Tribal community members living on the reservation and in nearby border towns, with a focus on under-resourced community members, including elders, people with disabilities, low-income residents, and parents.
- **Environmental Justice Issue**
  - High costs of energy dependence, due to fossil fuels and technological and infrastructure challenges. Harmful toxins from residential use of fossil fuels for energy, causing high greenhouse gas emissions.



# Project Purpose Statement

*A project purpose statement is a high-level description that defines the what, who, and why of the project.*

- Includes the Environmental Justice Issue and Community of Focus
- This was included in your application
- Adjust if things have changed\*

# Project Purpose Statement Example

*A project purpose statement is a high-level description that defines the what, who, and why of the project.*

- To better understand the need, desire, and potential barriers to supporting residential solar to support increasing the energy independence of the Tribe, with a focus on under-resourced community members, as well as preventing harmful and toxic expellents.

# Project Goal

*This is meant to detail your project's specific outcome, with clear parameters.*

- What are the realistic intentions of your project?
- What will your project accomplish?
- This may be stated in your project purpose statement, but it is important to make it explicit.
- Your project should only have one goal so that it minimizes confusion.

# Project Goal

*This is meant to detail your project's specific outcome, with clear parameters.*

- To develop a detailed report with clearly identified themes around the need, desire, and barriers to residential solar use by engaging a representative sample of Tribal community members, with a particular focus on under-resourced populations.

# Project Objectives

*These are milestones that will support your project's goal, monitor project progress and success, and ensure quality*

- They take components of your project purpose and put them into clear, specific, and measurable steps
- What will you create, build, design, produce, accomplish, or deliver?
- These represent the components of your project that require significant time and resources

# Project Objectives Example

*These are milestones that monitor project progress and success, and ensure quality*

- Build the capacity of Bright Futures to implement the SOLL project through project administration activities and grant requirements, including the completion of the project work plan, attendance at grantee trainings and regular meetings with Grant Manager, and the submission of quarterly reports.

# Project Objectives Example

*These are milestones that monitor project progress and success, and ensure quality*

- Gain an understanding of community members' needs, desires, and potential barriers for residential solar use by developing, conducting, and analyzing surveys, focus groups, and community meetings.

# Project Tasks

These should align with your Project Purpose Statement and Objectives

In your work plan, these will be further detailed with timeframes, who is responsible, status updates, the challenges incurred, and mitigation strategies.

For your work plan, try to strike a balance between discrete tasks, while not having too many.



# Project Tasks Example

Build the capacity of Bright Futures to implement the SOLL project through project administration activities and grant requirements, including the completion of the project work plan, attendance at grantee trainings and regular meetings with Grant Manager, and the submission of quarterly reports.

- Draft work plan and submit to project partners for review
- Incorporate feedback from reviews and submit to GM
- Attend grantee trainings
- Attend regular meetings with Grant Manager
- Draft and submit quarterly reports

# Project Tasks

Gain an understanding of community members' needs, desires, and potential barriers for residential solar use by developing, conducting, and analyzing surveys, focus groups, and community meetings.

- Conduct background research to find surveys used to assess residential solar, including those used with Tribal communities
- Using these tools, develop survey draft
- Share draft with project partners for feedback, and incorporate input

# Deliverables

*These show that your Objectives have been completed*

- Clearly defined, with requirements for completion
- These will be aligned with specific dates and timeframes

# Deliverables Example

Build the capacity of Bright Futures to implement the SOLL project through project administration activities and grant requirements, including the completion of the project work plan, attendance at grant trainings and regular meetings with Grant Manager, and the submission of quarterly reports.

- Draft project work plan that has all 7 required sections
- Finalized project work plan
- Meeting agendas with attendance listed at grant trainings and meetings with GM
- Draft quarterly report
- Final quarterly report

# Deliverables Example

Gain an understanding of community members' needs, desires, and potential barriers for residential solar use by developing, conducting, and analyzing surveys, focus groups, and community meetings.

- Draft survey, focus group and community meeting guides
- Finalized survey, focus group and community meeting guides
- List of number of surveys completed
- Agendas for focus groups and community meetings conducted, including number of participants

# Organizations / Persons Responsible

*Ensure clarity around team members' roles*

- Confirm team members' responsibilities for the project tasks
- These may be organizations, but identify a point of contact

# Organizations / Persons Responsible

## Example

*Ensure clarity around team members' roles*

- Conduct background research to find surveys used to assess residential solar, including those used with Tribal communities: *Gary Litefoot, Associate Researcher*
- Using these tools, develop the survey draft: *Gary Litefoot, Associate Researcher*
- Share the draft with project partners for feedback and incorporate input: *Tribal Research and Engagement Consortium (TREC), Benny Jetts, Coordinator*

# Timeframes

*For each deliverable, identify the expected completion date for each activity*

- Ensure they are realistic and achievable
- Plan review time for each deliverable:
  - Date for submission of draft
  - Grant Manager Review period
  - Time to incorporate feedback
  - Submission of final deliverable
- Build in a buffer for unexpected delays
  - Timeline modifications



# Timeframes: Tasks

*For each deliverable, identify the expected completion date for each activity*

- Conduct background research to find surveys used to assess residential solar, including those used with Tribal communities: *June 30, 2025*
- Using these tools, develop the survey draft: *July 15, 2025*
- Share the draft with project partners for feedback and incorporate input: *August 7, 2025*

# Timeframes: Deliverables

*For each deliverable, identify the expected completion date for each activity*

- Finalized survey, focus group, and community meeting guides: *September 1, 2025*
- List of number of surveys completed: *October 15, 2025*
- Agendas for focus groups and community meetings conducted, including number of participants: *November 15, 2025*

# Status Updates

*These updates on your work plan will capture the status of project tasks and deliverables*

- Briefly describe updates, but provide enough detail around significant occurrences.
- These will be shared with your GM on a regular basis, along with your Communication Strategy and meeting schedule

# Status Updates: Tasks

- Conduct background research to find surveys used to assess residential solar, including those used with Tribal communities
  - This task has been completed. 10 surveys were reviewed, with 3 out of those 10 specific to Native communities
- Using these tools, develop the survey draft
  - Survey draft developed, with 15 questions
- Share the draft with project partners for feedback and incorporate input
  - Draft was shared with all 4 project partners. 3 project partners provided feedback. Relevant feedback was incorporated into the draft.

# Status Updates: Deliverables

Finalized survey, focus group, and community meeting guides

- This deliverable was completed and delivered before the deadline

List of number of surveys completed

- This deliverable is currently being developed as survey collection has just ended and eligible surveys are being counted

Agendas for focus groups and community meetings conducted, including number of participants

- This deliverable is in progress. 1 of the 4 focus groups and 2 of the 3 community meetings have been conducted. Anticipate completion by the due date

# Potential Obstacles and Mitigation Strategies

*There is always the possibility of unexpected hiccups*

- Consider potential obstacles or challenges that could delay the project or affect the deliverable completion
- Identify what restrictions or limitations your team and project face
  - This helps to define your scope and prevent “scope creep”

# Potential Obstacles and Mitigation Strategies Example

*There is always the possibility of unexpected hiccups*

- Implementation of surveys, focus groups, and community meetings are dependent on getting Tribal IRB approval
- Recently, Tribal priorities have shifted focus to a community issue that may delay engagement in data collection
- While there is some wiggle room in the timeline for the project, data collection would be best during the peak summer months

# Potential Obstacles and Mitigation Strategies

*Outline strategies for preventing or mitigating identified risks*

- Plan for both solving the technical problem and communicating with your team, partners, and community of focus



# Potential Obstacles and Mitigation Strategies Example

*Outline strategies for preventing or mitigating identified risks*

- Implementation of surveys, focus groups, and community meetings are dependent on getting Tribal IRB approval
  - The Project Team will work diligently to put together the Tribal IRB packet and ensure that it contains all the required materials, protocols and safeguards

# Potential Obstacles and Mitigation Strategies Example

*Outline strategies for preventing or mitigating identified risks*

- Recently, Tribal priorities have shifted focus to a community issue that may delay engagement in data collection
  - The Project Team will be respectful in their community outreach efforts, conducting more discrete recruitment methods if needed

# Potential Obstacles and Mitigation Strategies Example

*Outline strategies for preventing or mitigating identified risks*

- While there is some wiggle room in the timeline for the project, data collection, particularly surveys and focus groups, would be best during the peak summer months
  - The Project Team plans to implement a tiered approach to the data collection, and will start with distribution of the survey as soon as the Tribal IRB is approved

# Communication Strategy

*Identify how updates and progress will be shared with the MAP EJ Grants Hub staff and your GM. Use as check-ins to assess progress, address challenges, and discuss next steps*

- Identify key team members and partners
- Identify how updates and progress will be shared, including meetings, progress reports, written materials
- Identify frequency of communications, including regular meeting schedule with GM

# Communication Strategy Example

*Identify how updates and progress will be shared with the MAP EJ Grants Hub staff and your GM. Use as check-ins to assess progress, address challenges, and discuss next steps*

The Project Director and Manager will meet with the GM for 1 hour on a biweekly basis for the first quarter of the project and then reassess meeting frequency. During these meetings, the work plan will be reviewed, including progress on objectives and deliverables, any obstacles encountered, and mitigation strategies being implemented.

# Process for Developing Your Work Plan

- Identify which work plan template you will use
- Meet with your GM to discuss process to develop work plan
- Work with your project team to draft the work plan sections Objectives, Deliverables and Timeframes, updating information from your application as needed.
  - Flag any significant changes from your application
  - Define your objectives and deliverables
  - Align with needed resources, including your budget

# Process for Developing Your Work Plan

- Get input from your team, partners, and stakeholders
  - Have clear questions for feedback
  - Integrate relevant changes to your work plan
- Send draft work plan to your GM as a required deliverable
  - Work with GM on any changes to your draft work plan
- Submit final work plan

# Questions to Consider

- How frequently would you like to submit invoices and receive payments?
- What is your expense outlay going to look like?
- When will you be completing key activities and products for your project?
- What required activities will you be completing (e.g. quarterly progress reports)?
- How will you be able to document completion?



# Quality Assurance Project Plan

This describes the activities of an environmental data operations involved in the acquisition of environmental information

- Direct collection
- Secondary collection
- Compiled from databases and sources

# MAP EJ GRANTS HUB

# Q&A

