

Golden LEAF Guidance for Grantees:

Work Plan/Timeline
Evaluation Plan

A project work plan should show the key activities that must occur to achieve the outcomes outlined in the **Grantee Acknowledgment and Agreement** and the original proposal. It tells, in some detail, how you will accomplish what you proposed you will accomplish.

It is a plan that tracks milestones—activities critical to the progression of a project toward an outcome or set of outcomes—which if not achieved along the path toward project completion, will signal the need for correction or change in order to reach the desired end result on time. Milestones help measure progress and interim accomplishments.

The work plan? Where you're going – who's taking you there -
- how you're going to get there on schedule – how you'll know if you're still on track.

The **Grantee Acknowledgment and Agreement** may require you to submit a “revised work plan” that reflects any special terms and conditions of the grant. This is most often the case when the Golden LEAF grant awarded is less than the requested amount.

If the Golden LEAF grant awarded was *less* than your request, explain how you will achieve the purpose of the grant with less funding.

Some things to consider and address:

- Will you be realigning committed resources to accomplish the same goals? Will you move certain elements in-house versus contracting them to external sources?
- Will you reduce the number of people served? By how many? Why was the reduction in people served necessary versus an adjustment in another area?
- Will you do only part of the originally proposed project?

A project timeline should show the key elements outlined in the project work plan with target dates assigned to them. It answers the question by what date each activity will be accomplished. The time frame for the timeline is the term of the grant which, most frequently, is 12 months.

There is no prescribed format for the timeline. Often, grantees submit a list of key activities in table form with one column showing the activity, a second showing the person responsible for that activity, and another showing the completion date.

Provide enough detail in the work plan/timeline for Golden LEAF to be able to track progress toward completion at a given time point, but not so much detail as to allow no flexibility or to provide no added value.

Given a construction/upfit project, a work plan/timeline should have more than “Construction” managed by the project manager and expected completion in 11 months. We’d like to know about the steps in that 11-month process. When will engineering and/or design work be complete? Must your organization follow a bidding process? Is demolition necessary? What about site work, the actual construction process, final inspections and approvals for occupancy? Who on your project team, along with any outside party if applicable, is responsible for each of these activities? When is each activity scheduled to begin and to be complete?

These are examples of the types of information we’d like to see included in the work plan/timeline.

We welcome your call if you have questions about your project.

Golden LEAF Guidance for Grantees: Work Plan/Timeline Example

GOLDEN COMMUNITY COLLEGE Work Plan/Timeline for Commercial Truck Driving Program

Task	Person responsible	Milestone†	Jul '06	Dec '06	Jan '07	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Complete all tasks associated with purchase of additional property to accommodate driving track	GCC Facilities Mgr: Andy Bazemore															
Driving track site prepared	Andy B.															
Tractors w/sleepers and trailers requisitioned and put out for state bid; bids approved and processed	CTDP Dept. Head/Project Mgr.: Clive Duggins															
Equipment received and licensed	Clive D.															
Daytime classes begin: First class	Clive D./Instructor: Emogene Fonville	E = 13 C = 11														
First weekend/evening class	Clive D./Instructor: Gus Hardy	E = 5 C = 3														
Second day class	Emogene F.	E = 13 C = 11														
Track employment	Clive D./	L = 22 W = 17														
Interim report to Golden LEAF	Clive D.															
Third day class	Emogene F.	E=13 C = 11														
Second weekend/evening class	Gus H.	E = 5 C = 3														
Fourth day class	Emogene F.	E = 13 C = 11														
Track employment	Clive D./Dir. of Institutional Effectiveness: Ira Jeffers	L = 21 W = 17														
End of grant report to Golden LEAF	Clive D.															

E = Students enrolled

C = Students who completed course

L = Students licensed with CDL

W = Students employed as a commercial truck driver

An evaluation plan can be considered an extension of the work plan and timeline. It is a plan that identifies what performance **outcomes you will measure** and describes the **procedures you will use** to: 1) measure and track the progress of the project and 2) collect data related to project outcomes both at the close of the grant and potentially, for three years following.

A project evaluation plan tells:

- What outcomes will be achieved as a result of the project,
- When the outcomes will be achieved,
- How those results will be measured, and
- The method by which all the pieces of data will be collected.

“Activity” versus “Outcome”:

An activity is something that is done. An outcome results from activity.

Example:

Activity: Our organization will train 60 unemployed people in machine tooling

Outcome: 55 of the participants will have filled open positions in the aerospace or support industries as a result of this training.

A grant is awarded to a municipality, the Town of Leafville, to stimulate/grow business activity.

**Town of Leafville
Evaluation Plan for the "Business Growth and Stimulation Project"**

As a result of A, B and C activities outlined in our work plan, the Town of Leafville expects to increase business growth in the Town. We will measure the following indicators of business growth:

Sales tax records – Merchants will provide baseline numbers on the total annual sales tax before the project commences and will continue to submit these records on an annual basis to the Town until three years after the close of the grant. We expect sales tax receipts to increase by at least W % [or by \$W] annually.

Job creation – Merchants will provide baseline numbers of existing full-time and part-time positions before the project commences and will continue to submit records of employee headcount on an annual basis to the Town until three years after the close of the grant. We expect each year, the Town will add/fill X new full-time equivalents, broken down into full-time and part-time, [or increase by X%].

New businesses/building permits – The Town will record the number of existing active business licenses as the baseline. New business creation will be tracked by the number of licenses for new business that are issued and a record kept of building permits issued each year until three years after the close of the grant. We expect this project would result in the development of Z new businesses each year.

	Baseline 06/30/2010	After Y1 03/20/2011	After Y2 06/30/2012	After Y3 06/30/2013	Y3 change over baseline
Total annual sales tax					
Jobs created					
Businesses created					

A grant is awarded to Golden Community College to help implement a commercial truck driver training course to increase the availability of licensed commercial truck drivers for current and projected openings at trucking companies in northeastern North Carolina.

GOLDEN COMMUNITY COLLEGE Pastoral Plains, North Carolina

To: Golden LEAF Foundation
From: Golden Community College
Date: August 24, 2010
Re: Evaluation Plan for “Golden CC Commercial Truck Driver Training” project

During the 12-month grant period, Golden CC will train at least 50 students in an 8-week course that includes 124 hours of classroom instruction, 21 hours of off-road (range) instruction and 25 hours of over-the-road driving experience in preparation to test for a Commercial Driver’s License (CDL).

The administrator of the truck driving school will document the number of students enrolling in each class, completing training, receiving CDL licenses and obtaining employment as commercial truck drivers.

- By the end of the grant period in December 2011, GCC anticipates training a minimum of 50 students.
- By the end of the grant period, 42 students (85%) or more completing training will have obtained their commercial truck driver license.
- By the end of the grant period, 34 students (80%) that complete training and licensing will have obtained employment as commercial truck drivers.

If you have questions or need further guidance on your project's work plan, timeline and/or evaluation plan, please contact:

For projects funded through the Community Assistance Initiative:

Pat Cabe, Vice President of Programs – Community Assistance & Outreach
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For the Economic Catalyst Program, Open Grants Program and special initiatives other than the Community Assistance Initiative:

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