



# Indiana Office of Community and Rural Affairs

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**Mary Shaw**

**Indiana Main Street**



# Indiana Office of Community and Rural Affairs

## Creating and Using Action-Oriented Work Plans

# INDIANA MAIN STREET

## 2018 RETURN ON INVESTMENT



**Volunteers**  
**7,850**



**Volunteer Hours**  
**145,598**



**Net jobs created**  
**1,821**

**1519**  
FT

**460**  
PT

For every \$1 used to support a local Main Street program an average of \$56 in new investment is leveraged. This makes Main Street one of the most successful economic development strategies in America.



**Total Investments on Indiana Main Streets**

**\$369M**  
\$369,515,833



**Total businesses in Main Street**

**11,750** — **278**



**Net New Business**  
New: **536**  
Relocated: **155**  
Expanded: **173**

**Buildings Renovated**  
Total: \$20,523,388

**500**

**27**

**New Buildings**  
Total: \$108,157,961



**494**

**Buildings Rehabbed**  
Total: \$165,482,856

OCRA

Office of  
**COMMUNITY &  
RURAL AFFAIRS**

# Session Description

- Work plans are tools that no program should be without! Effective work plans save time, money, and headaches for your board of directors, committees, and staff. Take a look at the who, what, when, where, and why of work plan development.
- **This session should convince you (hopefully) that a user-friendly work plan can be your greatest asset.**

# Session Agenda

- WHY?
- WHAT?
- WHO, WHEN & HOW?
- PRACTICE MAKES KINDA PERFECT
- QUESTIONS/COMMENTS

# Are You Ready????



**Don't wait until this happens to  
create a work plan!**



# The Why!!

## Mission and Vision Fulfillment

- ❖ Provides clear and specific guidance on fulfilling your mission and vision!
- ❖ Helps you stay on track with goals, objective and tasks
- ❖ Provides an actionable framework of all your organization's activities.
- ❖ Helps tell the story of your organization
- ❖ Volunteer Recruitment!



# Connecting the Dots



Reviewed at the annual board meeting!





**TYBEE ISLAND  
DEVELOPMENT AUTHORITY-MAIN STREET PROGRAM  
:2018 - 2019 PLAN OF WORK:**

PRIORITY GOAL ONE						
Transformation (Implementation) Strategy						
Historic Preservation and Education						
Priority Goal:						
Implement and promote historic preservation plans						
Priority Objective:						
A set of guidelines and incentives for the overlay district (in partnership with the Historic Preservation Commission)						
Milestone:						
Implementation, public announcement						
Status	Task	Responsible Party	Time Line	Budget	Partners and Resources	Four Points
	Identify historic preservation needs for the overlay district	Vicki	In progress - June 2018		Historic Preservation Commission, City Staff, Expert Consultant	Design, Organization
	Engage an expert to develop specifics of the architectural plan	Chantel	In progress - Dec 2018		Historic Preservation Com, City Staff, DCA Design Studio, HPD Grant, model examples	Design, Organization
	Prepare a fact sheet on the incentives for and importance and impact of historic preservation	Melissa	May 1 - June 2018		Historic Preservation Com, HPD (Allison Ashbrook), City Staff, Historic Savannah Foundation, National Park Service	Bus. Assistance, Design, Promotion
	Work with the city council to tie historic preservation to incentives (façade grants, etc.)	Vicki, Julie	In progress - Dec 2018		Historic Preservation Commission, City Staff, City Council	Bus. Assistance, Design, Organization
	Highlight key properties to use as best examples and models for the program	Expert Consultant	Dec 2018 - Dec 2019		Historic Preservation Commission, City Staff, Expert Consultant	Design, Organization
	Continue ongoing community outreach efforts w/ existing events, meetings, informational pieces	Chantel , Vicki	In progress - Dec 2019		Historic Preservation Commission, City Staff	Design, Organization, Promotion
Partner Involvement						
Agency Name		Primary Contact	Level of Commitment	Synopsis of Activity		
Historic Preservation Commission		Jan Will	TBD			
City Staff		Chantel	TBD			
DCA Design Studio		Carmine Fischetti	TBD			
Historic Savannah Foundation		Daniel Carey	TBD			
National Park Service		Melissa M.	TBD			
Expert Consultant		TBD	TBD			
Others as Identified		TBD	TBD			

# Maintain Your Sanity!



Investigate online project management tools such as Basecamp, Trello or Microsoft Teams

- ❖ Project Management
- ❖ Partnership Development
- ❖ Volunteer Recruitment & Management
- ❖ Budgeting & fundraising
- ❖ Recording keeping
- ❖ Scope Management



# Scope Management

- Do not add activities unless they fit the program's purpose
- Do not attempt projects for the wrong reasons: because a grant is available, because an activity will put someone on the payroll, because the activity will generate publicity, etc.
- Evaluate each proposed activity to be sure it meets the program's goals and vision for the district
- Learn to say no or put suggestions on a list for future discussion and/or action
- Don't be so rigid that you turn down good opportunities when they come along, but make sure that your program can handle any changes in the agenda and that they are made for sound reasons

# Meet Designation / Accreditation Standards

The National Main Street Center Says So (and so does Indiana Main Street) 😊

## Standard 3. Comprehensive Work Plan

A comprehensive annual work plan provides a detailed blueprint for the organization's activities; reinforces the program's accountability both within the organization and in the broader community; and provides measurable objectives by which the program will track its progress. Tasks, with names of people assigned to complete them, budgets and timelines are important components that add to the strength of this document.



# What is a Work Plan

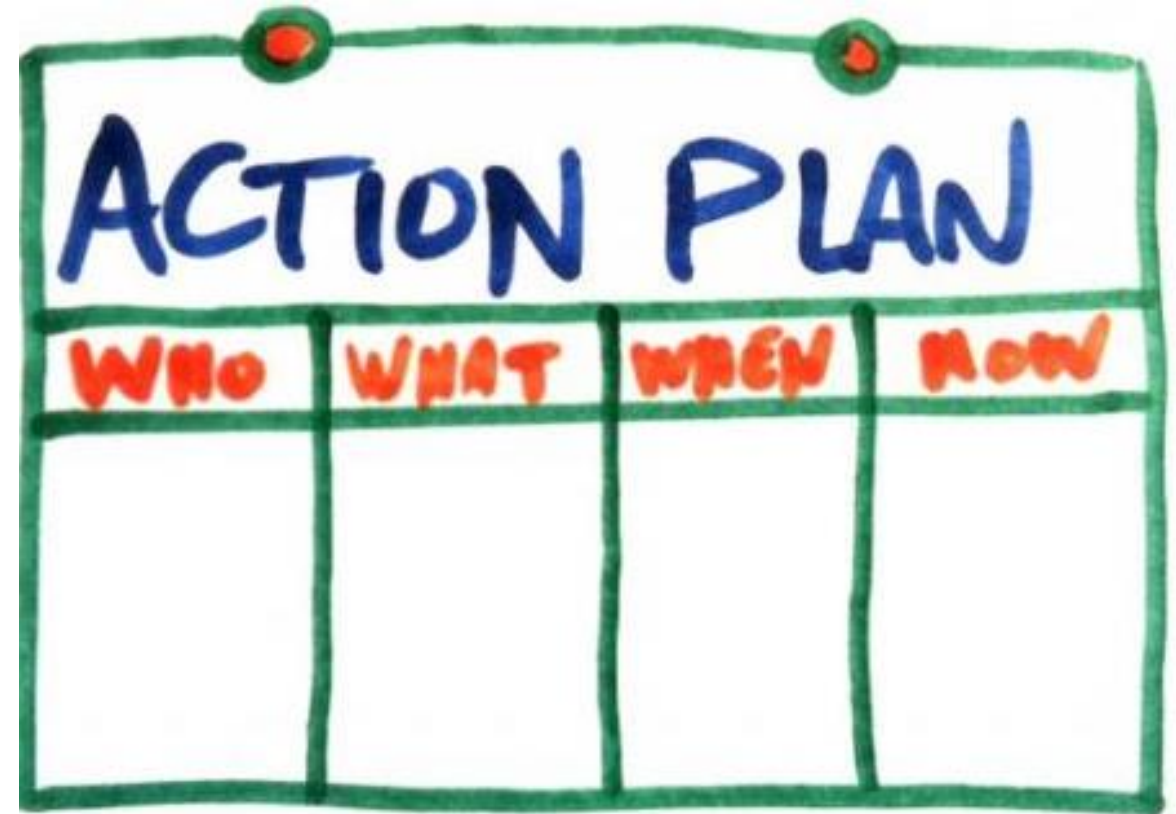


A work plan is a tool to break down the goal setting process into smaller more actionable steps. Action steps are specific tasks required to advance and make progress toward a strategic action.



# Work Plan Components

- Goals
- Objectives
- Projects
- Tasks
- Timetable
- Responsibility
- Budget
- Measure of Success



A hand-drawn diagram of an action plan. It features a green border with two red circular markers at the top. The title 'ACTION PLAN' is written in large blue letters across the top. Below the title is a table with four columns labeled 'WHO', 'WHAT', 'WHEN', and 'HOW' in red. The table has three rows, with the top row containing the column headers and the two rows below being empty.

WHO	WHAT	WHEN	HOW

# ONE EXAMPLE

Alberta Main Street **WORK PLAN BLANK**

Page \_\_\_\_ of \_\_\_\_

- Design  
  Business Development  
  Organization  
  Promotion  
  Equity  
  Board

Priority Goal & Objective:			
Chair/Person Responsible	Phone:	Email:	
Project Team Members:			

Project:					Anticipated Completion Date:			
Tasks	Who	Potential Partners	Deadline	Est. Expense	Est. Revenue	Vol Hours	Staff Hours	Completed
Total Anticipated Resources								
Comments & Notes								
Anticipated Result/Measure of Success								

# REAL LIFE EXAMPLE

## Alberta Main Street **WORK PLAN EXAMPLE**

Page \_\_\_\_ of \_\_\_\_

Design    Business Development    Organization    Promotion    Equity    Board

Priority Goal & Objective:	Resources provided by AMS, for both capital projects and business programs, reach a diverse group of community members, businesses, and property owners.
Chair/Person Responsible: Jonnie Ling	
Project Team Members: Jennifer, Meagan and Ranjit [Primary staff support: Sarah Staben]	

Project: Increase the number of priority populations (minority owned business/property owners and long time property owners) that receive AMS matching mini grants.						Anticipated Completion Date: 6/30/2015		
Tasks	Who	Potential Partners	Deadline	Est. Expense	Est. Revenue	Vol Hours	Staff Hours	Completed
Review definition of priority populations	Jonnie		10/16/2014			1	.5	
Review Design Committee mini grant work plan at October meeting	Team	Design	10/16/2014					
Identify and reduce barriers to participation in mini grant program.	Ranjit	OAME, MESO	11/20/2014			3	.5	
Evaluate barriers and need to provide child care during informational meetings	Jonnie		11/20/2014	\$50 (potential)		2	1	
Review/update program description & application to identify if/where there are opportunities to make more accessible.	Meagan	MESO	11/20/2014			3	2	
Review score sheet w/an equity lens. Provide feedback to design committee.	Ranjit	MESO	12/18/2014			1	1	
Attend Design committee meeting to review outreach plan.	Jonnie	Design	12/16/2014			.5		
Conduct targeted outreach to priority populations.	Team		1/15/2015			20	5	
Follow up with business/property owners prior to the application deadline to offer assistance and/or answer any questions.	Team		1/31/2015			10	5	
<b>Total Anticipated Resources</b>				<b>\$50</b>	<b>\$0</b>	<b>40.5</b>	<b>6</b>	
Comments & Notes								
Anticipated Result/Measure of Success		30% of mini grant awarded to priority populations						

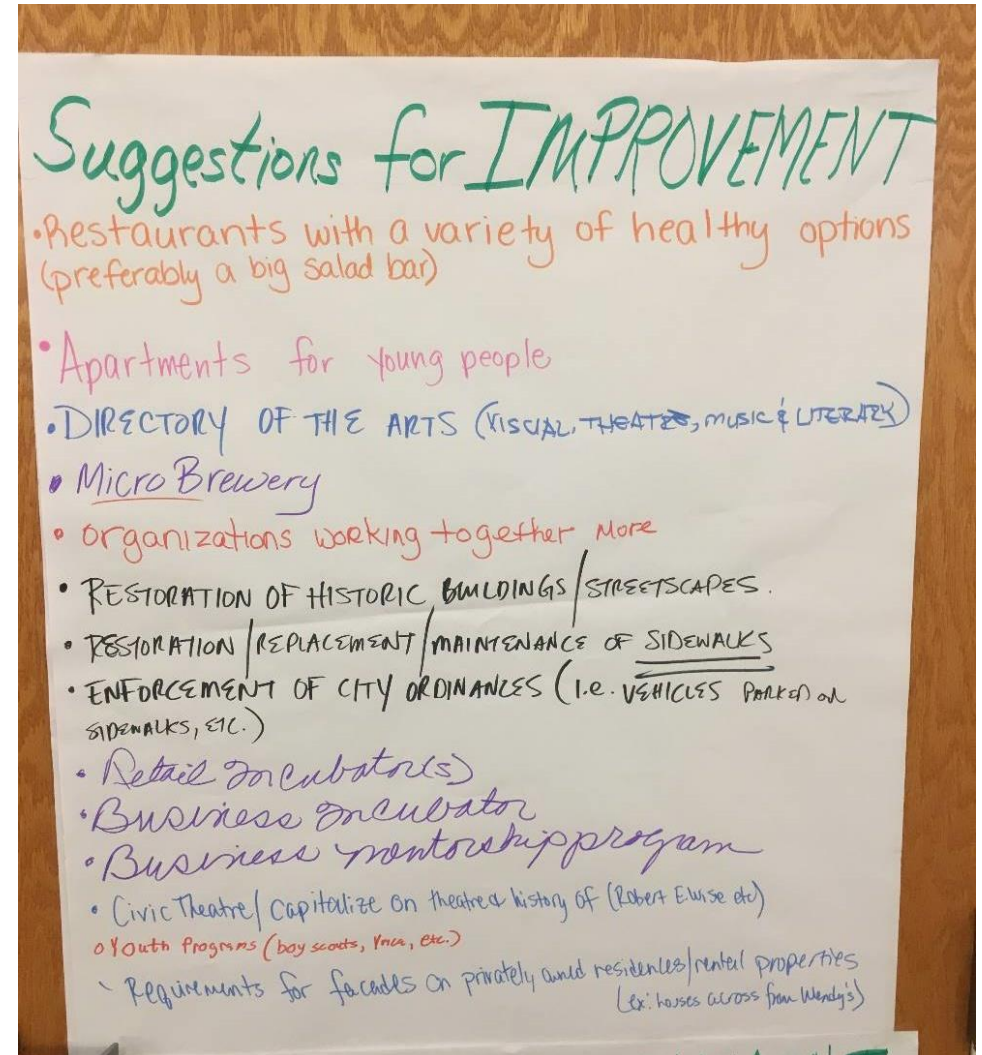


# Who?

- Board Members
- Staff
- Committee Volunteers
- Prospective Volunteers
- Key Stakeholders
- It should not just be the Main Street Manager!



Conduct a public forum to gather input from the community



# When?

- Typically 4-6 months prior to the end of program or fiscal year
- Work plans typically cover 12-18 month period



Don't wait until January 2020 to begin planning for 2020!



# How?

- Identify specific action steps that need to be done
- Define “who” will be responsible for each action step
- Determine when each action step will take place
- Estimate resources required for each action step
- Determine the metric of success for each action step
- Revisit and revise the work plan on a regular basis



Ensure that all four points are being considered when creating action steps / activities

# How?

## **Step 1: Goal setting session for Board of Directors (4 to 5 hours to complete)**

- List issues at random.
- Determine what area of concentration each issue fits under (organization, promotion, design, economic vitality) Group them together, and then delete duplicates.
- Determine priorities. Remove the rest of the issues.
- Create objectives. Each objective statement should begin with an action verb.
- Create a goal statement for each team based on the objectives--the organization "stuff" usually falls to the board or a subteam of the board.
- Check mission statement against the Team goals to see if it is still reflective of what the organization is working towards accomplishing).

# How?

**Step 2: The Board of Directors should come up with a list of potential team members based on the objectives for each team.**

**Step 3: "Activity planning" brainstorming session (about 2 hours per team)**

- List possible activities under each objective.
- Determine priority activities for each objective.

**Step 4. "Action planning" session (2 or 3 hour-long meetings to complete).**

- Discuss possible timelines for each priority activity (i.e. when should this be started and how long will it take from beginning to end).
- Complete an "action plan" for *each* priority activity in which planning will need to begin within the next two-three months.
- Fill out a "timeline" sheet. Put all priority activities from the team somewhere on the form. Think about what the workload will mean for those implementing activities -- is it realistic? Adjust as needed. The Board of Directors should approve the finished timeline.



# Practice Kinda Makes Perfect

## Practical Exercise

- **Goal:** Increase the number of community members shopping downtown
- **Part 1:** Idea Generation
- On your own take five minutes to brainstorm projects that may help your community reach this goal.
- Write down any ideas related to all four points. Be sure to consider the following:
  - Can it be accomplished in 12-18 months?
  - Does it fit within your organization's mission?
  - Will it have measurable results?

# Practice Kinda Makes Perfect

## Practical Exercise

- **Goal:** Increase the number of community members shopping downtown
- **Part 2:** Work plan development sheets
- Based on the projects generated identify how many of the projects can realistically be done in the coming year. This may be one project or it may be eight projects depending on the size and scale of the projects. Remember to consider resources (volunteers, time, money, etc.) available.
- Be sure to balance projects and activities across the 4 Points – Organization, Promotion, Economic Vitality and Design.





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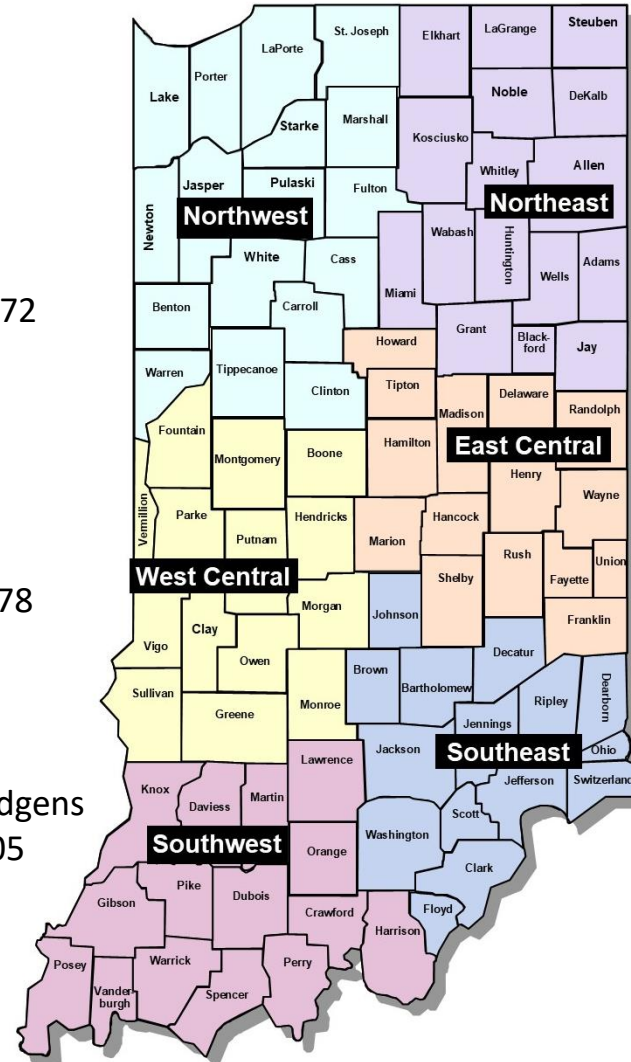
# Questions??

# Community Liaisons

**Northwest**  
Gerry White  
(317) 694-8372

**West Central**  
Paul Smith  
(317) 450-5078

**Southwest**  
Christmas Hudgens  
(317) 439-8905



**Northeast**  
Andrea Kern  
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