

STEP 4 TOOLKIT

Develop a Work Plan, Budget, and Schedule

What will this Toolkit help you do?

- Develop a work plan that considers all of the activities that need to be undertaken, how long they will take, the resources that will be required, and who will be responsible
- Avoid scope, budget, and schedule issues throughout the planning process
- Get ready to move on to the actual infrastructure planning stage

What Tools are in this Toolkit?

- Infrastructure Work Plan Table
- Infrastructure Work Plan Checklist

When should you use this Toolkit?

- If the community is in the process of developing a Comprehensive Community Plan (CCP), use this Toolkit as you complete Pre-Planning Step 5 in the *CCP Handbook* (see page 22 of the *CCP Handbook*).
- If the community is going through another infrastructure planning process, use this Toolkit to help you complete Step 4 in the Guide, and before you take any further steps in the planning process.

**TIPS:**

- Do not rush the development of the work plan, budget, and schedule. Preparation will make subsequent steps of the planning process go more smoothly.
- While the Infrastructure Planning Team (led by the Project Leader) may drive the use of this Toolkit, be sure to engage the entire CCP Planning Team (if the community is developing a CCP) as the work plan is being implemented.

INFRASTRUCTURE WORK PLAN TABLE

A good work plan considers all activities, how long they will take, the resources that will be required, and who will be responsible for what. Taking the time to develop a detailed work plan prevents issues with scope, budget, and schedule.

Read through the entire Guide and Toolkit to get an idea of all the steps in the infrastructure planning process. Additionally, consider seeking the support of knowledgeable individuals to help you develop a detailed work plan.

Be sure to reference your completed Stakeholder Analysis Template (see the Step 3 Toolkit) to see who should be engaged and on what topics in the infrastructure planning process. You should identify specific communication and engagement activities in the work plan for each identified stakeholder.

Use the table on the following page to build your work plan. The table includes the following columns:

ACTIVITY—List the main activity or step in the work plan.

PURPOSE—Describe why you are conducting the activity.

DESCRIPTION—Describe the specific actions that will be taken to complete the activity.

EXPECTED DURATION—Indicate how long you expect the activity to take. If possible, provide dates.

OUTPUTS/RESULTS—List what will be produced at the end of the activity.

EXTERNAL EXPERTISE REQUIRED—State whether you will need to engage the help of external expertise to complete the activity.

BUDGET (COSTS)—Provide an expected budget to complete the activity. Remember to include the cost of engaging consultants, travel, honoraria, and other expenses as needed.

LEAD—List who will be primarily responsible for leading the completion of this activity.

OTHER RESOURCES—List any non-monetary resources that will be involved in completing this activity.

ASSUMPTIONS AND RISKS—List any major assumptions you have made about this activity, and any risks involved in carrying out this activity within the schedule and budget.



ACTIVITY	PURPOSE	DESCRIPTION	EXPECTED DURATION	OUTPUTS/ RESULTS
<p>Example: Project kickoff meeting</p>	<p>Initiate the project with the Infrastructure Planning Team and ensure everyone is clear on the project purpose and team roles and responsibilities</p>	<ul style="list-style-type: none"> • Prepare meeting agenda • Invite team members • Conduct meeting • Prepare meeting notes and distribute to team members 	<p>1 day</p>	<ul style="list-style-type: none"> • Meeting notes • Terms of Reference for Infrastructure Planning Team

EXTERNAL EXPERTISE REQUIRED	BUDGET (COSTS)	LEAD	OTHER RESOURCES	ASSUMPTIONS AND RISKS
No	Internal staff time (16 hours) @ \$25hr = \$400	Team Leader	All other team members to participate	The meeting will be held at the Administration Building in the community

INFRASTRUCTURE WORK PLAN CHECKLIST

As the Infrastructure Planning Team drafts the work plan, refer to this checklist to ensure all necessary components are included.

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DOES THE WORK PLAN INCLUDE TIME, BUDGET, AND RESOURCES FOR:

- Gathering background information on infrastructure assets? This includes conducting a high-level review of existing reports/plans, which can be time-consuming.
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- Assessing, at a high-level, opportunities and issues related to infrastructure and services?
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- Identifying the implications of the community's vision and goals for infrastructure? This includes assessing order of magnitude construction and operating costs.
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- Engaging external experts (for example, Tribal Council staff and consultants) as needed to provide input?
-
- Communication and engagement on infrastructure and/or raising awareness of infrastructure considerations with the community and/or Chief and Council?
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- Developing growth projections that are detailed enough to enable infrastructure feasibility studies? Growth projections need timelines and must relate to geographical areas—e.g., specific reserves—and should include estimates of future industrial/commercial/institutional development in addition to residential development?
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- Appropriate engagement with stakeholders who have an interest in or concern with infrastructure?
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- Preparing Infrastructure Needs Scoping Sheets for high-priority infrastructure projects? (See Step 8 in the Guide and Toolkit)

- Developing an implementation strategy for the plan you create?

- Seeking input from the entire Infrastructure Planning Team?

DOES THE WORK PLAN:

- Clearly state the objectives or desired outcomes of the infrastructure planning process?

- Clearly state assumptions you are making that affect scope, schedule, and budget?

- Clearly identify risks to scope, schedule, and budget?

If you were unsure about checking ‘YES’ to any of these questions, revisit your work plan and include any missing information.