Work Process Masterplan Template

Top-Level	Sub-Level	Key Element or Measure	Status	Documentation	Effort	Owner	Notes and actions
Based on KNN Framework	Green font denotes that examples are available						
1.0 Governance	1.1 Board Recruiting & Development	Board members have active defined role	Red	Process Summary	Breakthrough	Exec Dir	
	1.2 Board Meetings and Committees	Committees deliver strategic plan tasks	Red	None	Breakthrough	Exec Dir	
2.0 Planning	2.1 Strategic Planning	Documented plan	Green	Informal	Improve	Exec Dir	
	2.2 Organization design		Green				
	2.3 Executive Dashboard & Reviews		Green				
3.0 Leadership	3.1 Team Meetings	Agenda accomplished	Green	None	Maintain	Staff 1	
4.0 Transparency & Accountability	4.1 Compliance	Pass audit	Yellow	Informal	Improve	Board Chairs	
5.0 Financial Management	5.1 Budgeting & Finance Reviews	Board review	Green	Informal	Improve	Board 1	
	5.2 Taxes						
6.0 Fundraising	6.1 Donor Solicitation (corporate)	Goal met	Green	Informal	Maintain	Exec Dir	
	6.2 Donor Solicitation (individuals)	Goal met	Green	Informal	Maintain	Exec Dir	
	6.3 Major Gifts		Yellow				
	6.4 Special events	Goal met	Green				
	6.5 Grant writing	Goal met	Green	Informal	Maintain	Exec Dir	
	6.6 Social Enterprise		New				
7.0 Programming	7.1 Intake (new clients)	# clients	Yellow	Process Summary	Improve	Staff 1	
	7.2 Mentor Programming (Coaching Roadmap)		Green				
	7.3 Client Goal Setting	Goals met inc skill attainment	Green	Process Summary	Improve	Staff 3	
	7.4 Care Planning		Red				
	7.5 Case Management		Green				
	7.6 Curriculum Development (e.g. life skills)	Quality lesson plans	Light green	Process Summary	Improve	Staff 1	
	7.7 Curriculum Execution	Curriculum executed according to plan	Green	Process Summary	Maintain	Staff 1	
8.0 Communications	8.1 External…social media, newsletter	Plan executed	Light green	Marketing plan	Improve	Staff 1	
	8.2 Annual Report	Report published on-time	Green	No	Maintain	Exec Dir	
	8.3 Ambassadorship		New		New	Board Chairs	
9.0 Human Resources	9.1 Staff Recruiting		Green				
	9.2 Staff Development & Retention	Evaluations and staff development plans	Green	Key documents	Improve	Staff 1	
	9.3 Pay & Benefits		Green				
	9.4 Event Mgt (retirements, transfers, terminations)		Green				
10.0 Volunteer Engagement	10.1 Internal Readiness	Key roles staffed w. role descriptions	Light green				Use Best Practices Tool only
	10.2 Generate awareness, recruit and screen	# volunteers > 30, no early dropouts	Light green	Process Summary	Improve	Staff 1	
	10.3 Orientation, Training and Development	Ready for role within 30 days	Green	Informal	Maintain	Staff 1	
	10.4 Provide Supervision and Coaching	All events staffed 1 week in advance	Green				
	10.4a Mentor Matching, Monitor & Support	Postive mentee feedback	Green				
	10.5 Belonging & Recognition	Survey responses	Red	Process Summary	Maintain	Staff 1	
11.0 Information & Technology	11.1 Web site and related tools		Green		Maintain	Staff 2	
	11.2 Computers, networking & printing		Green				
12.0 Strategic Alliances	12.1 Partnership Management	Partners delivered agreed to services	Yellow		Improve	Exec Dir	
13.0 Public Policy & Advocacy	13.1 Community Engagement		na				
14.0 Other	14.1 Risk management…legal, insurance	Risk Assessment "score"	Red	Need risk mgt plan	Breakthrough	Volunteer	
	14.2 Facility Management…maintenance, security		Green				