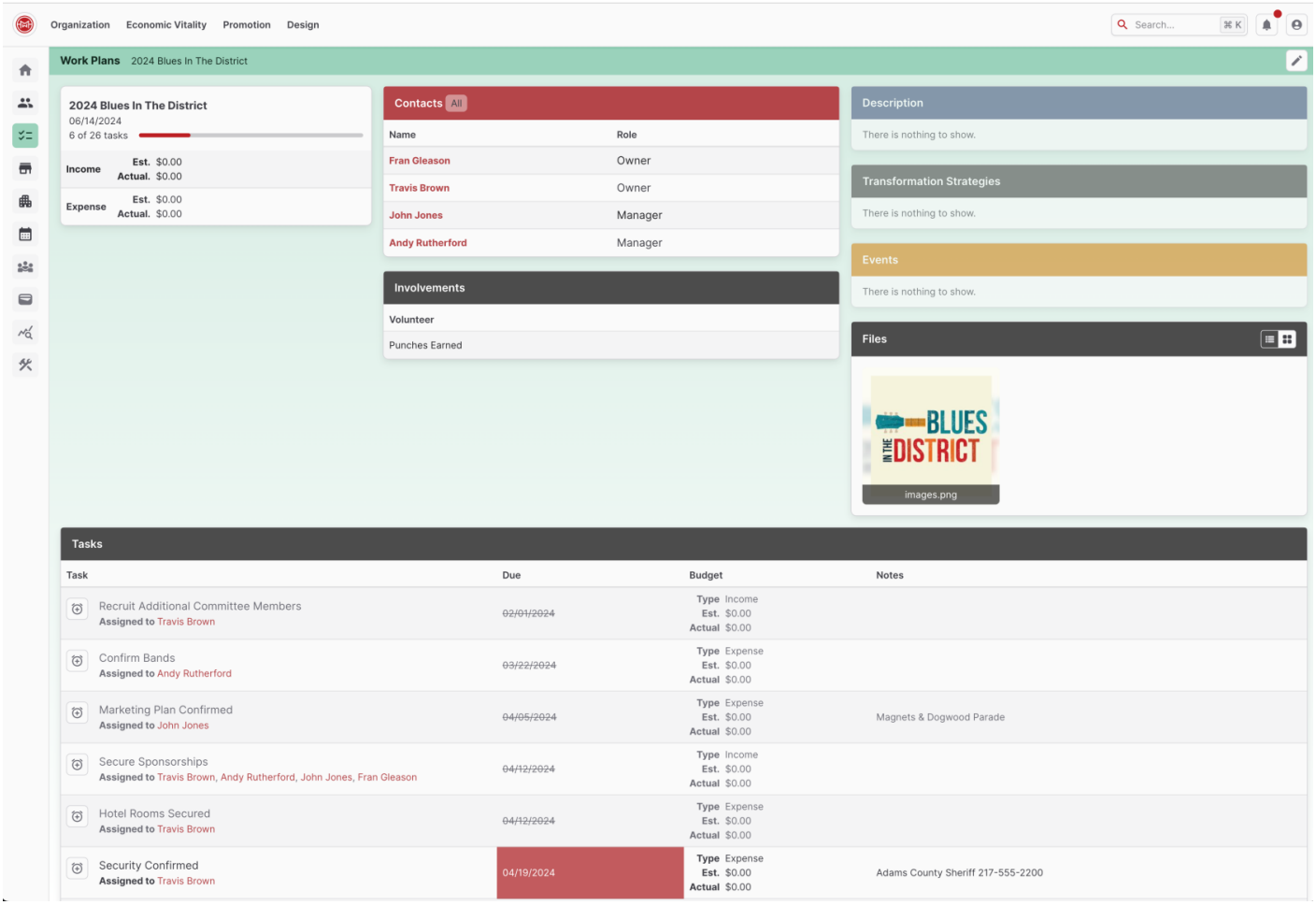
1.06 Work Plans

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Works Plans Overview

Work plans are one of the key ways that Main Street organizations get thing done. These task lists are critical in keeping everyone on the same page and ensure that everything gets done on schedule.

Work plans can be imported using the template provided by Maestro or can be manually entered into Maestro.



Work Plan Info

The Work plan name is the required field to save the work plan.

If your work plan does not have a specific date (i.e. a concert, etc) you can leave the date field blank. However, if this is a function year after year, you may want to consider dating that for January 1 or December 31. This will make it easier to copy the work plan from year to year.

If your event has a chair, you can select them from your contact database.

Contacts

The contacts that you attach to this work plan should be those on the committee who are responsible for the project. You do not need to include every person who may have a task assigned to them, but rather those who are in charge. Once you attach the contacts, the work plan will appear on their contact profile as well.

Involvements

If you have involvements tied to this work plan, you can list them here. Any involvement that you add to this work plan will have the volunteer hours associated with this work plan added to that total.
For example, if you have 4 Design work plans and your “Design Committee” involvement is attached to all four of those work plans, every hour that gets assigned to any of the work plans will also be included in the “Design Committee” involvement total.

While you do not need to include your sponsorships, etc. it is recommended that you include any of your involvements in this section.

Transformational Strategies

You can use this section to include any transformational strategies or goals associated with this work plan. You can then mark those goals as achieved. Goals and number achieved are included in your reporting

Files

Like our profiles, you can attach any file using this section. You cannot edit the file once it is uploaded, but you can remove and upload a new version.

Tasks

Each task has several elements that you can use to ensure that your project is completed on schedule.

- Task (this is where you put what needs to be done)
- Task Assignment (who is responsible for this task. This can be one person or a group of people. Once you assign the task it will appear on their contact profile and they will be notified if they have configured their notifications)
- Due Date (not required, but recommended)
- Budget (each line item can have its own budget. You can toggle between income or expense. You can also enter your budgeted or estimated amount as well as the actual, which will be helpful when duplicating work plans)
- Notes (this section is important to tell people everything they need to complete the task. For example, if you needed them to order T-Shirts, you would enter the sizes, quantities, etc. so the person has everything they need to complete the task).

Deleting/Duplicating Tasks

To duplicate a task, click on the copy icon to the far right of the task. This will replicate everything that is already created within the task, including due date, budget, etc. You can then edit the task with the new information. To delete a task, click the “X” to the far right of the task.

Duplicating Work Plans

For events that you do year after year, you may find it easier to duplicate or clone a work plan rather than creating a new one from scratch each year.

Start in the overall work plan list. In the upper right hand corner, next to the “+” button to create a new work plan, you will have the “clone” icon which will start the process for duplicating a work plan.

Select the work plan you want to copy, enter the new name and date, and select the options you want to include. Click clone and the new work plan will be created.