

Work plan and Budget

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Outline

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- Why Work plans Are Important?
- How to Develop and Use a Work plan?
- What is Budget?
- Why Budgets Are Important?
- When to Develop and a Budget?
- How to create a simple budget?

What is work plan?

- A work plan is a schedule, chart or graph that summarizes the different components of research project and how they will be implemented in a coherent way within a specific time-span.
- Work plans typically list tasks required, who will be responsible for each task, when each task will need to be undertaken, and the amounts of human and other resources required to complete each task.

The work plan identifies:

- What specific tasks are required
- Who will be responsible for helping to complete each task
- When each task will be undertaken and the sequence of linked tasks
- How much each task will cost

- These work plans can be recorded in a table, Gantt chart, and/or project calendar.
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- Depending on the size and scale of the programme or project, the overall work plan can be further developed into work plans for subprojects, teams or even individuals.

Why Work plans Are Important

- A work plan breaks the project down into small, manageable pieces and reduces the overall complexity of the project.
- It gives you a more precise definition of the short term tasks, deliverables, and people responsible.

This helps the project team to:

- Ensure all the essential tasks in the project are planned
- Allocate tasks efficiently to individuals (all tasks allocated with no duplication)
- Be aware of short term priorities and how individual performance will be assessed

- Establish a project schedule that can be tracked and monitored
- Set expectations for project progress and establish accountability
- Analyse problem areas more effectively
- Develop a more accurate budget and ensure adequate funding and other resources are available.

How to Develop and Use a Work plan

- Work plans need to be developed by the project managers, project staff and/or key team members who will be implementing them.

- Developing a work plan involves going through the following steps:
 - 1) Identify specific tasks that need to be done
 - 2) Define who will be responsible for each task
 - 3) Determine when each task will take place
 - 4) Estimate costs for each task
 - 5) Complete the work plan
 - 6) Revisit and revise your work plan on a regular basis

- Although your work plans may be quite detailed and precise, you should be prepared to make changes and amendments to your plans as your project's situation changes.
- You may find, for example, that you cannot get the funds or people at a certain time when they were originally expected to be available. This is why adaptive management is so important.

Work plan

[illegible]

Gantt chart

- Gantt chart is a planning tool that depicts graphically the order in which various tasks must be completed and the duration of each activity. (BY Henry Gantt, 1910s)

Gantt chart

[illegible]

Gantt chart

[illegible]

Gantt chart

[illegible]

Simple table

Work breakdown/ Task	Who	Dates	Cost
Recruitment of supply			
Sample collection			
Laboratory investigation			
Data entry and data analysis			
Reporting writing			
Dissemination of results			

Work plans, to be comprehensive, will include:

- what will be done
- who will do it
- what resources will be required
- how performance will be monitored and measured; and
- when work will be done

What is Budget

- a statement which indicates a coordinated plan of activities
- the effects of all activities are expressed in monetary values
- provides the basis for utilizing scarce resources
- directing for achieving specific objectives
- essentially work plans translated into financial terms

- Once you have developed a work plan for your project with expected costs, the next step is to prepare a budget that reflects the costs and resource needs for carrying out the project over the same time period
- if work plans have been properly prepared, the budgeting process is greatly simplified

Why Budgets Are Important

- Understand the full costs of your project in the work plan timeframe
- Ensure that your team understands the demand for resources and has access to all needed resources for completion of the project
- Provide a basis for proposal development and fund raising

- Increase transparency for your donors and other stakeholders.
- Without a well-prepared budget, even the most detailed strategies, activities and work-plans do not
- provide your team with a full understanding of your project's costs and resource needs

When to Develop and a Budget

- Initial budgets should be completed along with your work plan and then updated on a regular basis.

How to create a simple budget

1. List your activities
2. Check the rules again
3. Cost each item
4. Put it in a spreadsheet
5. Justify it

Budget breakdown

No	ITEM	Kyats
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1.	Advocacy meeting x 2times	20,000
2.	Construction of structured questionnaire and Pre-testing	33,000
3.	Stationary	20,000
4.	Transport charges 5000 kyats x 2times x 10days	100,000
5.	3 cc syringes 150 x 100 kyats	15,000
	EDTA tube 150x 100 kyats	15,000
	Haemoglobin kit x 4 boxes	34,000
	Pipette tips 3 boxes	33,000
	Food weighing scale 5 pieces x 10000 kyats	50,000
6.	Subject fees 1500x 120 children	180,000
	TOTAL	500,000

Budget breakdown

No	Items	Kyats
1.	Proforma	50,000
2.	Stationary	50,000
3.	Transport charges 300 kyats x 2 times (toGm;tNyef)x 10 persons x100 days	600,000
4.	Hire labour charges 2500 kyats x 2 persons x 100 days	500,000
	TOTAL	1,200,000

Detail budget breakdown

No.	Description		Estimate Cost(Kyats)
1.	Advocacy meetings		348,000
	Travel cost to Taunggyi 32000 kyats x 2 persons	128,000	
	Travel cost to Moneywa 32000 kyats x 2 persons		
	Refreshment for 2 places	100,000	
	Accommodation for 30000 kyatsx 2 places x 2 persons	120,000	
2.	Subject fees for elderly 3000 kyats x 270 persons		810,000

3.	Field Survey		2,448,000
	Travel cost to Taunggi 32000 kyats x 7 persons	224,000	
	Travel cost to Moneywa 32000 kyats x 7 persons	224,000	
	Perdiem for research assistants 5000 kyats x 7 persons x 5 days x 2 places	350,000	
	Perdiem for basic health staffs 5000 kyats x 4 persons x 5 days x 2 places	200,000	
	Accommodation 5000 kyats x 7 persons x 5 days x 2 places	350,000	
	Transportation in local area 40000 kyats x 5 days x 2 places	400,000	
4.	Development of questionnaire		44,000
	TOTAL COST		2,950,000

Thank you