DEVELOP A WORKPLAN AND BUDGET

ACTIVITY GUIDE

OVERVIEW

This guide assumes that you have designed an intervention with an accompanying Theory of Change, and that you are ready to budget and plan your activities.

At this point you have designed an intervention program that, according to your Theory of Change, will enable the market to work better to meet your target consumer’s health need. Now it is time to develop a workplan and budget to help your team coordinate activities and allocate resources during implementation.
WHEN TO CONDUCT THIS ACTIVITY
It is recommended that this step be applied for all types for projects that use the Keystone framework.

TIME, RESOURCE AND STAFFING REQUIREMENTS

<table>
<thead>
<tr>
<th>Who will participate in this activity?</th>
<th>• Team lead will create the workplan and budget with inputs from Finance and any other project management representatives (e.g. Regional Project manager).</th>
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| What time and resources are required?  | • Creating a workplan should take roughly half of a day.  
• Budgeting will take another day (depending on the complexity of the budget template and donor requirements). |
INSTRUCTIONS

GOAL
Creating a budget and workplan will help us determine:

1. **Who** is responsible for each activity
2. **How** should project funds be allocated
3. **When** each activity should be implemented

OUTPUT
The final output will consist of:

- A Gantt chart and workplan
- An overall budget document

GANTT CHART AND WORKPLAN
Your program budget will depend on the workplan, and the first step for creating your workplan is to produce a Gantt chart

A Gantt chart is a planning tool that outlines the timing of tasks required to achieve a goal and highlights dependencies where one task must be completed before another task can begin. Gantt charts are used by project managers across all sectors, as they provide an easy-to-follow visualization of complex projects.
Gantt charts are constructed as follows:

- Each task takes up one row.
- Dates run along the top in increments of days, weeks or months, depending on the total timeframe the project requires.
- The expected time for each task is represented by a horizontal bar.
- This time bar’s left end marks the expected beginning of the task, and its right end marks the expected completion date.
- Tasks may run sequentially, in parallel, or overlapping.

**CREATING A GANTT CHART**

The entire Gantt chart process should take approximately half a day.

To create a GANTT chart:

1. First, obtain a Gantt chart template.
2. Next, **fill in the chart with any milestones included in your Intervention Plan**.
   - A milestone is the accomplishment of an event that is usually the culmination of several tasks.
     - *Example:* ‘Launch media campaign’ is a milestone that would have resulted from several tasks, such as ‘Develop creative brief,’ ‘Choose winning advertising agency,’ ‘Produce ads’, etc.
     - In rare cases this may be the culmination of a single task.
     - These milestones will provide the framework for the chart.
3. Then **work backwards from these milestones** to establish the timelines for all the tasks leading up to that milestone.
   - Only include the most important tasks on your workplan, so that there are no more than 15-20 tasks for a given plan. This helps fit everything onto one page, making the ‘big picture’ of the plan easy to understand. It also makes it easy to make changes the plan if need be after it has been reviewed in a monthly or quarterly meeting.
   - More complex projects may require subordinate charts which detail the timing of all the subtasks that make up one of the main tasks.

The Gantt chart is one way of creating a workplan. There are other ways; in any case, once the Gantt chart or other workplan template is completed, you can move on to finalizing the workplan and then the budget.
For any new product launches or changes to existing products (e.g. new packaging or variants), PSI has developed a new product launch process to drive ‘on time, in full’ (OTIF) delivery to market. Refer to the guidance here for how to set up a product launch tracker and reach out to Global Marketing, Social Enterprise and Procurement teams for further support.

**CREATING THE BUDGET**
The budget lays out the proposed expenditure against each of the proposed activities in the Intervention plan. It will show you exactly where and how funds will be used at each step of each activity. Refer to your Gantt chart to get an idea of where your money needs will fall.

You should work with the finance or operations lead as well as the rest of the core team to build out your budget.

The format of the budget will vary across intervention programs. In some cases, donors will require that you use a specific budget template of their choice. Otherwise, teams may prefer to use a budget template they are already familiar with.

**NOTE:**
Ask your finance or operations lead to help you identify which budget template is required.

**MARKETING BUDGET**
In some cases, you may require a specific marketing budget that lays out costs for the following items:

- Advertising and communications production fees
- Advertising and communications media spend
- Consumer promotion activities
- Marketing research activities

Map your spending against each of the major activities, indicating when the activity will take place throughout the year.

The marketing budget should be tracked regularly (ideally every month at a minimum) to monitor the spend and make any adjustments as required based on the execution plans.
Some tips for managing a budget:

- Ensure that your budget estimates for each activity are based on realistic assumptions.

- As much as possible, model budget estimates on prior experience so they are as accurate as possible. This will help to avoid overages or under-spends.

- Allowing the budget to be edited by multiple people can quickly become confusing. Therefore, you should appoint one team member to be the budget ‘owner.’ The budget owner is responsible for building, tracking and updating the budget.

- Track the budget on a regular basis with the team to ensure that spending is on track.

- Check version control! Make sure the budget is saved in a place where all edits can be made centrally and can be tracked over time.

CONCLUSION

After completing this activity, you should have a full workplan and usable budget.

Summarize the steps in the ‘Keystone Project Summary’ template, with a short explanation based on the plans created during this Deliver phase, and include the full version of the workplan and budget in your project folder. Then return to the Keystone Manual and continue with the next phase.