



Guidelines for Work Planning, Reporting and Timesheets

These guidelines have been written as a response to a number of common issues that have arisen as part of the recent introduction of new systems of work planning and reporting.

1. Calculating the time that tasks will take

- Tasks will **usually** take longer than you think they will - even if you are on a tight timescale, be **generous** and allow a little longer than you think absolutely necessary. You will be glad that you have allowed yourself this 'breathing space'.
- Most tasks, but **especially** events and meetings, will involve some preparation and follow-up time, and possibly travel as well.

For instance: you have a one hour meeting with the youth worker at a community centre in Blackpool. It might be reasonable to assume that you would estimate this meeting as **1 hour** on your timesheet, but...think again:

You know that you will probably need to spend **30 minutes** reading through previous correspondence before the meeting to get your head back in gear. You will have to travel to the meeting from our Preston centre, which will involve a walk to the train station and catching the train, then a walk from Blackpool station to the community centre. This will take approximately **1 hour** in total. Then you have to repeat the journey back to Preston (another **1 hour**). Because of the nature of the meeting, you know that you will probably have to spend at least **1 hour** following up the outcomes (which could include typing up notes, contacting other people, etc).

So - your **1 hour** meeting in reality actually takes **4.5 hours** of your time. This is the amount of time that should be shown on your workplan! No-one will think the worse of you for showing this amount of time, and of course you can do some preparation or other work on the train, therefore making good use of the travelling time.

2. Administration and meetings

- You spend a proportion of each day reading emails, making phone calls, writing letters, making cups of tea, chatting to colleagues, etc. Make sure you 'budget' for it in your workplan. You don't need to show it on a daily basis, but do make sure that you plan for it over the entire quarter/term.

For instance, if you reckon you do 1 hour of this kind of stuff a day, and you've got 40 working days in the quarter, that's **40 hours** of admin each quarter.

- Meetings also take up time. We have a **half-hour** 'red box' meeting every Tuesday, a **2 hour** Staff Meeting once a month, and most project workers will have at least **2 x 2 hour** Project Management / Support & Supervision meetings in a planning period. These need to be accounted for...including **preparation** and **follow-up** time

before and after the meetings!

- There are also occasionally additional meetings, such as Strategic Planning Days and Annual Appraisals that don't happen every quarter. **Make sure you check your diary when planning to see if there are any meetings like this coming up.**

3. Training and Annual Leave

There are spaces for these on your workplan, and it's vital that you complete them. If you are away for a day training, or away for a week on annual leave it will have a massive impact on the rest of the time you have available in the quarter. **Don't forget to account for them!**

4. Updating your workplan

- You're planning for either a quarter or a term - that's a long period of time, during which it's easy to forget what you've done! As you have to write a report at the end of the period, it would be helpful to make notes about where you're up to with each task, so that when you come to writing your report at the end of the planning period, you **know** what you've done, rather than having to scabble to remember. The **Progress** column on the workplan is there specifically for this purpose.

Making notes in this column also makes it easier for your line manager to give you appropriate support during Project Management / Support & Supervision meetings.

You don't have to fill this bit in electronically, but if you choose to do it by hand, **make sure that you provide your line manager with an updated copy of your workplan before your Project Management / Support & Supervision meeting.**

- Plans change. In planning for a long period like a term or a quarter, **no-one expects your plan to remain set in stone!**
- **But**, if plans change, it might be helpful to indicate this on your plan - this makes giving support during Project Management and Support & Supervision meetings easier!
- Suggestions to show how plans have been updated / changed:

Add the changes in a different colour text - make sure that when you do this you show somewhere what date the different colours refer to. This will be helpful for you, and for your line manager:

E.g.,
Had to update this bit of my plan here

Had to update this bit here too, a bit later on

Somewhere near bottom of plan:

07.04.08

12.04.08

These are just suggestions for ways you can keep your plan updated - but, it's

important that you find ways that work for you.

- **Save a copy** of your workplan in the following location:
Z:\Staff reports, plans and time logs\ and the appropriate period
- **Print one hard copy of your report** and place this in your line managers pigeon hole. After checking by your line manager, this will then be filed in the Staff Work Plan Folder by your line manager.

5. Reporting

- The narrative report is to be written by **project staff** following the completion of your quarterly or termly planning period. Reports do not need to be written by non-project staff ie. Finance Manager and the Administration Officer.
- Complete the narrative report template, drawing on particular examples of progress, successes, problems and lessons learnt. The template is designed to allow you to be reflective and honest about your work.
- You can draw on the '**progress**' column as outlined in 4) above to capture specific examples that you're happy with. This reporting format allows you to draw together information that you can use at a later date to help write reports to funders, and the information from reports is also fed into the system for monitoring progress against LGEC's overall strategic plan. Specific quotes from users or beneficiaries may also be used for the LGEC Annual Review.
- LGEC reports should be written in priority to funders reports. These can then be drawn upon for funders' reporting purposes. An annual report for a funder can draw upon the LGEC reports throughout the year.
- **Save a copy** of this document in the following **two** locations:
Z:\Staff reports, plans and time logs\ and the appropriate period
Z:\Current Projects\ and the appropriate folder for the project
- **Print one hard copy of your report** and place this in your line manager's pigeon hole. After checking by your line manager, this will then be filed in the Project File by your line manager.

6. Timesheets

- An electronic timesheet in Excel format is used to record your actual working time on a daily basis, TOIL, annual leave, Sickness and overtime. This is designed to be as simple as possible and should ideally be updated every day.
- This document is saved in the following location:
Z:\Staff reports, plans and time logs\
- **Print one hard copy of your timesheet** and place this in your line manager's pigeon hole. After checking by your line manager, this will then be filed in the Staff Timesheets and Holiday File by your line manager.

7. Deadlines and Due Dates for Planning, Reporting and Timesheets

- **Reports** for the past quarter or term are due by the **10th** of the following month, together with a **plan** for the coming quarter or term. For example:
- Quarter 1: January – March. Report for this period is due **10th** April with a plan for April to June.
- Autumn Term: September – December. Report for this period is due **10th** January with a plan for the Spring term.
- **Timesheets** for the last month are also due on the 10th of each month.