**APPENDIX H –WORK PLAN INSTRUCTIONS & CHART**

The Work Plan details the steps and tasks required to actualize the capital asset project. It specifies who will plan, implement and manage the project; when and in what sequence the activities will occur; and, which personnel and what resources will be needed to carry out the project.

The Work Plan also establishes benchmarks with target completion dates. If the Project is funded, the Work Plan will be used to develop the Project Scope, Timeline and Budget of the Grant Agreement.

The Work Plan reinforces the project narrative and aligns with the cost estimate to establish:

* Goals and objectives of the proposed Project including implementation (e.g., strategy, timeline, committed resources, municipal and partner support).
* Assessments previously conducted or to be completed as part of the work plan.
* Project deliverables and when the State can expect them.
* That the Project can be developed within allotted timeframes.
* That the Project can be completed for the grant amount plus other committed funds.
* Reasonable benchmarks and target completion dates.
* Alignment with the Narrative, Cost Estimate and other support documentation.
* Provisions for periodic review by the State and modifications if needed.

Use the Work Plan Chart on the following page to identify specific benchmarks, activities, tasks, responsible parties and timeline for the capital assets project that will be funded by this grant. Provide the best estimated dates within the funding timelines. Use as many rows as needed, and add or subtract activities as appropriate.

Take cash flow into consideration and the ability to await reimbursement when planning the schedule.

**Attach up to 3 pages of copies or excerpts from the following reports to support the Work Plan.** Include as supplementary information to help reviewers envision the project. Do not use attachments to answer narrative questions.

* Assessments and specialized studies that are directly relevant to the project. (i.e., preservation needs assessment, energy audit, termite report, etc.)
* Reports from planning activities (such as visioning sessions, charrettes, strategic plans.)
* Organization policies that directly support the proposed capital asset project.
* Organization policies that directly support the Legislative Objective being served.

If the **applicant** is a unit of government responsible for the operation of the museum, complete the attachment **as the museum.**

**APPENDIX H –WORK PLAN INSTRUCTIONS & CHART**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **BENCHMARK 1 – PLANNING. ADMINISTRATION & PRE-CONSTRUCTION ACTIVITIES** | | | | |
| Activity | Task | Entity Performing Task | Start | Completion |
| Needs Assessments, Surveys, Planning |  |  |  |  |
| Develop Project Goals, Objectives, and Action Steps |  |  |  |  |
| Stakeholder Meetings and Public Outreach |  |  |  |  |
| Develop architectural plans, design specifications, property appraisal, etc. |  |  |  |  |
| Complete Environmental Review |  |  |  |  |
| Secure / Finalize all funding |  |  |  |  |
| Finalize all Agreements, MOUs |  |  |  |  |
| Coordinate with jurisdictional entities for ROW, permits, etc. |  |  |  |  |
| State review of the above |  |  |  |  |
| **BENCHMARK 2 - CONSTRUCTION & IMPLEMENTATION**[[1]](#footnote-1) | | | | |
|  | Task | Entity Performing Task | Start | Completion |
| Bid and Award Contract |  |  |  |  |
| Demolition and Site Preparation |  |  |  |  |
| Construction, Fabrication, Acquisition Escrow , etc. |  |  |  |  |
| Installations |  |  |  |  |
| Inspections |  |  |  |  |
| **BENCHMARK 3 - COMPLETION & CLOSEOUT** | | | | |
|  | Task | Entity Performing Task | Start | Completion |
| Completion of the Project, Celebration Event |  |  |  |  |
| Closeout Site Visit and Final Documentation to State |  |  |  |  |
| **BENCHMARK 4 - OPERATIONS & MAINTENANCE** | | | | |
|  | Task | Entity Performing Task | Start | N/A |
| Ongoing Operations and Maintenance |  |  |  |  |

1. Per Public Resources Code Section 75126 (a) the project cost estimate and schedule, if awarded funding, should be of sufficient detail to allow assessment of the progress of the work plan at regular intervals. [↑](#footnote-ref-1)