OMB Control Number: 0970-0558
Expires: 11/23/2023

Work Plan Template

Section I. OVERVIEW

This Work Plan template developed by the Office of Community Services (OCS), is an essential tool for ensuring enhanced oversight of Community Services Block Grant (CSBG) cooperative agreements and promoting successful project implementation. This Work Plan is required for all CSBG cooperative agreements and serves as a blueprint for organizing, monitoring, and evaluating project progress and achievement of the goals and objectives as outlined in the Notice of Funding Opportunity (NOFO), specifically *Section I, Program Description*.

The Work Plan is intended to be a living document; award recipients have the flexibility to make amendments and adjustments as needed throughout the project period, with the approval of and/or as recommended by the OCS Project Officer. This document should serve as a dynamic guide, assisting you in planning, identifying deliverables, and exploring potential collaboration opportunities. By utilizing this template effectively, you can establish clear benchmarks, track progress, and ensure satisfactory advancement towards completing the activities outlined in this Work Plan.

The OCS Project Officer for each cooperative agreement will schedule recurring 1:1 Performance Oversight meetings to discuss progress on the work outlined in this Work Plan. These conversations will offer an opportunity to address any challenges, provide guidance, and foster an open line of communication between OCS and your team.

Thank you for your dedication to our shared mission of reducing poverty, revitalizing communities, and empowering individuals and families with low income. Together, we can make a lasting impact.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Section II. Instructions

Each section of the CSBG Work Plan should be completed according to the following instructions (an example of a completed goal can be found in *Appendix A*). Where applicable, the award recipient may opt to include activities outlined in the submitted award application (e.g., submitted Logic Model).

Term	Definition
Project Title	Include the project title. This project title will be used throughout the entire project period. *The OCS Project Officer may prepopulate this field to align with the cooperative agreement.*
Award Number	Include the award number. This project title will be used throughout the entire project period. *The OCS Project Officer may prepopulate this field to align with the cooperative agreement.*
Project Period	Historically, CSBG Work Plans covered one award year; however, this work plan will cover the *entire project period* (i.e., 3 years). Include the start and end date of the period of performance. Include the number of years for the entire award. *The OCS Project Officer may prepopulate this field to align with the cooperative agreement.*
Organization	Include the name of the award recipient's organization.
Region	Include the region number, if applicable. *The OCS Project Officer may prepoulate this field to align with the cooperative agreement.*
Award Contact	Include the name and email address of the award contact person.
OCS Project Officer	*OCS will include the name and email address of the OCS Project Officer.* ***For use by OCS.***
Objective Description and Goal	The OCS Project Officer will populate the Objective Title by including each project objective separately. This work plan will focus on the objectives outlined the Notice of Funding Opportunity, as well as, the cooperative agreement provided to you by OCS for your award (e.g., if there are six objectives outlined in the cooperative agreement, this work plan will include six objectives for each year of the project [unless the objective was fully completed in a previous year of the cooperative agreement). The award recipient will add one (1) goal written in SMARTIE format for

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Term	Definition
	each objective. • We define SMARTIE terms below: o *Specific:* Who? (target population and persons doing the activity) and What? (action/activity) o *Measurable:* How much change is expected? o *Achievable:* Can be realistically accomplished given current resources and constraints. o *Relevant:* Are your goals aligned with the priorities of your program and NOFO? Is it meaningful to the population of focus and community being served? o *Time-bound:* The outcome will be met within the project period. o *Inclusive:* Brings traditionally marginalized people—particularly those most impacted—into processes, activities, and decision/policy-making in a way that shares power. o *Equitable:* Seeks to address systemic injustice, inequity, or oppression. • Please view the additional resources below to help turn your work plan into a SMARTIE work plan. o SMARTIE Worksheet o From SMART to SMARTIE: How to Embed Inclusion and Equity in Your Goals
Activities	Key/primary events which are specific, measurable, and sufficient in quantity such that their completion should lead to the accomplishment of the stated objective and goal. • It is likely that more than one milestone activity will be needed in order to produce an output. Activities may include processes, techniques, tools, events, and actions such as educational curricula, services, case management, training, consultations, etc.). Number each activity (e.g., two activities for Year 1 would show as: 1.1.1 and 1.1.2). *Add additional rows as necessary to reflect the appropriate number of activities for your project.*
Anticipated Target Start Date	Using the included calendars, include realistic target dates within the project period identifying when each activity will be initated.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Term	Definition
Anticipated Target End Date	Using the included calendars, include realistic target dates within the project period identifying when each activity will be completed.
Anticipated Product, Outcome, Proof of Completion, or Measure of Accomplishment	Description of anticipated outcomes or measures of accomplishment. These are used for ongoing monitoring and reporting of project accomplishments or progress toward reaching project objectives, goals, or activities.
OCS Status Update Comments	*The OCS Project Officer will add comments to the work plan indicating progress. This includes capturing a mitigation approach for delays and challenges. These comments will be added during 1:1 Performance Oversight meetings with the award recipient.* ***For use by OCS.***
Defined Deliverables	The award recipient will use section V to describe each anticipated deliverable, the task number(s) that the deliverable aligns with from section IV, and the anticipated submission date of the draft and/or final versions of each deliverable. • A deliverable refers to any item that is produced as a result of a project. Deliverables can take many forms, from physical products to online documents, reports, or software applications.
Budget Spend Down Status	*The OCS Project Officer will update this section quarterly and discuss during 1:1 Performance Oversight meetings with the award recipient.* ***For use by OCS.***
Status of Deliverables Outlined Within the NOFO	*The OCS Project Officer will update this section to reflect the status of submissions for all deliverables outlined in the NOFO and discuss during 1:1 Performance Oversight meetings with the award recipient.* ***For use by OCS.***
Performance Oversight	*The OCS Project Officer will update this section to confirm that regular 1:1 Performance Oversight meetings are being held with the award recipient.* ***For use by OCS.***

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Term	Definition
Meetings	

Section III. Submission

1. Submit your completed Work Plan via www.Grantsolutions.gov as a Grant Note by: Click or tap to enter a date.
2. Ensure your *Grant Note* follows the following naming conventions:
   Subject: Click or tap here to enter text. *"Work Plan – Version No. XX"*
   Note Type: Correspondence
   Notes: Click or tap here to enter text. *"Work Plan – Version No. XX"*
3. Send a courtesy email to the OCS Project Officer indicating that the Work Plan is available in GrantSolutions.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Section IV. Work Plan

The award recipient will complete Section IV to include all planned activities for the entire project period.

Project Title: Click or tap here to enter text.		
Award Number: Click or tap here to enter text.		
Project Period: *From:* Click or tap to enter a date.	*To:* Click or tap to enter a date.	*Number of Years:* Choose an item
Organization: Click or tap here to enter text.		**Region:** Choose an item
Award Contact: *Name:* Click or tap here to enter text.	*Email Address:* Click or tap here to enter text.	
OCS Project Officer: *Name:* Click or tap here to enter text.	*Email Address:* Click or tap here to enter text.	

Project Objective #:	Objective Title from the NOFO:	Goal *(written in SMARTIE format):*
Choose an item	Click or tap here to enter text.	Click or tap here to enter text.

Add rows as needed by clicking

Project Obj No.	Project Year	Activity No.	Anticipated Project Activities to Meet the Objective and Goal	Anticipated Project, Proof of Completion, Outcome, or Measure of Accomplishment	Anticipated Target Start Date	Anticipated Target End Date	OCS Status Update Comments
Choose an item	Click or tap to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap to enter a date.	Click or tap here to enter text.

Add Rows as needed

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Authorizing Official Recipient Signature: _____ Date: Click or tap to enter a date.

Section V. Defined Deliverables

The award recipient will complete Section V to include all planned deliverables for the entire project period. The OCS Project Officer will complete the Version and Final sections as deliverables are submitted by the award recipient.

Defined Deliverable (Description)	Aligns with Activity No.	Anticipated Submission Date	Comments	Version *(To be completed by OCS)*	Final *(To be completed by OCS)*
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap here to enter text.	Click or tap here to enter text.	☐

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Section VI. Budget Spend Down Status

For Use by OCS

Quarter	Beginning Budget ($)	Estimated Obligated Funds ($)	Estimated Unbligated Funds ($)	Spending Status	Date Discussed with Award Recipient	OCS Comments
Quarter 1	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Choose an item	Click or tap to enter a date.	Click or tap here to enter text.
Quarter 2	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Choose an item	Click or tap to enter a date.	Click or tap here to enter text.
Quarter 3	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Choose an item	Click or tap to enter a date.	Click or tap here to enter text.
Quarter 4	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Choose an item	Click or tap to enter a date.	Click or tap here to enter text.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Section VII. Status of Deliverables Outlined Within the NOFO

For Use by OCS

NOFO Deliverable	Version	Date Received	Comments	Final
Choose an item.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap here to enter text.	☐
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap here to enter text.	☐

Add Rows as needed

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Section VIII. Progress Reporting

For Use by OCS

The Semi-Annual Performance Progress Report (PPR) and Federal Financial Report (FFR) are due April 30 (covering September 30 – March 31) and October 30 (covering April 1 – September 29) of each budget period. The final reports are due 90 days after the expiration of the cooperative agreement.

Progress Reports	Year 1 April 30	Year 1 October 30	Year 2 April 30	Year 2 October 30	Year 3 April 30	Year 3 October 30	Final Reports
Semi-Annual Performance Program Report (PPR)	☐	☐	☐	☐	☐	☐	☐
Semi-Annual Federal Financial Report (FFR)	☐	☐	☐	☐	☐	☐	☐

Performance Oversight Meetings

Add Additional Rows as Needed

Award Year	October	November	December	January	February	March	April	May	June	July	August	Septembe
Year 1	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Year 2	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Year 3	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Click or tap here to enter text.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Appendix A

Sample Objective, Goal, and Activities

Project Objective #:	Objective Title from the NOFO:	Goal Description *(written in SMARTIE format)*:
1	Service Delivery Models, Strategies, and Partnerships	Over the 36-month project period, our region will actively collaborate with CSBG eligible entities to identify key activities to improve and/or develop protocols for service delivery models, strategies, and partnerships to better serve individuals and families with low incomes, particulary those who have been traditionally marginalized. We will actively engage the target population through the Community Needs Assessment process. Through this inclusive process, we aim to deliver high-quality services and collectively foster community conditions that promote self-sufficiency and advance equality. By the end of the project, we expect to have established a minimum of five successful service delivery models, strategies, and partnerships that measurably improve outcomes and quality of services fo the target population. This objective is achievable given our current resources and constraints and it aligns with the goals and objectives.

Project Obj No.	Project Year	Activity No.	Anticipated Project Activities to Meet the Objective and Goal	Anticipated Project, Proof of Completion, or Measure of Accomplishment	Anticipated Target Start Date	Anticipated Target End Date	OCS Status Update Comments
1		1.1.1.	Identify key activities to improve or develop protocols for service delivery models, strategies, and partnerships within 5 CSBG eligible entities for each budget period (fiscal year) of the award.	5 CSBG eligible entities are identified and a written process is developed to identify key activites to improve or develop protocols for service delivery models, strategies, and partnerships within their	December 4, 2023	February 29, 2024	Click or tap here to enter text.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.

Project Obj No.	Project Year	Activity No.	Anticipated Project Activities to Meet the Objective and Goal	Anticipated Project, Proof of Completion, or Measure of Accomplishment	Anticipated Target Start Date	Anticipated Target End Date	OCS Status Update Comments
				respective communities.			
	1	1.1.2.	Implement an approach to actively engage the target population through the Community Needs Assessment process.	A written plan is developed and communicated to the appropriate stakeholders to implement the determined approach seamelessly.	March 11, 2024	May 31, 2024	Click or tap here to enter text.
	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap to enter a date.	Click or tap to enter a date.	Click or tap here to enter text.

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to capture, organize, and present project elements to support monitoring of project progress and achievement of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 3.25 hours per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2023. If you have any comments on this collection of information, please contact CSBGStates@acf.hhs.gov.