

# Work Plan Information Guide

The CPRS National Board and the National Office have developed a business structure to ensure actions and results move the Society forward. The following outline of the Work Plan structure will help you understand the need for the Work Plans, the reporting structure and the budget review process.

## Developing Actions and Budgets

All Committees, Councils and Task Forces must develop annual Work Plans as part of our Regulations. These plans are integral to CPRS by linking the Strategic Goals, CPRS's Mission and the Vision to the committee's actions. The Plans are similar in scope to the ones you may develop for your company's department in which you would include an action plan and budget required for approval.

These Annual Work Plans are usually a few pages in length and are presented in a table format, which can be read at a glance. These Plans are not meant to be onerous to develop but are expected to be specific, measurable, achievable and timely. The National Office will provide the Committee Chair with a template to work with. The Annual Plan template has a section for the status of the items. This semi-annual update is used for forecasting the annual budget.

CPRS Inc. is directly responsible to its members to maintain a stable and financially sound organization. As we have moved to a positive financial situation, we are able to commit funds to achieve results. The Work Plan budget process ensures that this is achieved in a well-managed process.

## The Reporting Structure

**THE BOARD:** The National Board is accountable to the membership for the Society's products, services and expenditures of its funds. In order to manage the resources effectively, the Board reviews all Work Plans to ensure accountability to our members.

The Board bases its Work Plan funding decisions on priorities developed by the Board with input from committees / councils and Board Champions and of course, available funds over and above the funds necessary for daily operations of CPRS Inc.

To aid in two-way communication between the Committees and the National Board, Board Champions have been allocated to each Committee.

**COMMITTEES / COUNCILS:** Committees are responsible for the development of their individual Work Plans and are encouraged to liaise with other Committees where necessary. Chairs should discuss appropriate budget allocations with the Executive Director including such cost items as conference calls or email blasts.

Once the Work Plans are approved, the Committee Chairs are responsible for the outcomes of approved Work Plans, reporting to the Board and ensuring the approved budget is adhered to.

## Budget Review Process:

Our fiscal year is from April 1 to March 31. Year-end revenues and expenses results are reported to the membership at the Annual General Meeting. At the AGM, the membership also approves the incoming budget. The Work Plans are part of this funding approval process.

Work Plans are based on this fiscal year. The following outlines the Work Plan benchmarks.

<b>Work Plan Timelines</b>	
Oct / Nov	Committee Chairs prepare Work Plans for the coming fiscal year. Chairs should review the plans with their Board Champion(s) to ensure the actions relate to the current Strategic Plan and the Society's Vision.
Dec / Jan	The Committee Chairs submit the Work Plans to the National Office. The National Office prepares the Plans for Board Review.
Feb	The Board reviews all Work Plans, and determines funding available between the proposed upcoming National budget and the Committee requests.  In this overview, the Board will also look for items that may be covered by more than one committee. For example web items may be budgeted by three committees while the funds would be better housed with one committee with input from the other Chairs.
Mar	The Board approves Work Plan actions, with the budget subject to fiscal year-end budget results. The Board Champions liaise with Committee Chairs.
May / June	Incoming Board approves Committee Work Plan budgets following AGM.
September	Committee Chairs submit mid-year report on status of Work Plans to the National Office by early September.  This mid-year report is used for forecasting by Board. The Exec Committee may reallocate funds if Chairs do not expect Action Items to be completed by year-end. The Chairs will be notified immediate of any changes.

## Questions?

If you have any questions about this process, please contact the Executive Director, your Board Champion, or a member of the Executive Committee.