



Policy:	6.7.1
Approved By:	Management Group
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Policy Holder:	Chief Administrative Officer

WORK PROGRAM, FOLLOW-UP ACTION LIST AND PRIORITIES REPORT

Purpose

To provide guidelines for the use of Work Program, Follow-up Action List and Priorities Report formats as tools to allocate resources to tasks and projects, to prioritize work activities relative to available resources and to focus on the achievement of specific results.

A. Definitions

1. The Islands Trust's work program system is comprised of three working documents which are linked to the Trust's annual budget and organizational strategic planning process in terms of day-to-day and/or short range activity projections.
 - 1.1 The **Follow-up Action List** is designed to deal with matters to be dealt with during the next three months that arise from meetings, to highlight matters arising from day-to-day activities, and to define specific tasks associated with work program items.
 - 1.2 The **Work Program** is designed to identify a long list of specific projects or activities that are not items for the Follow-up Action List for potential future work, to identify the top priority projects approved for current work, and to define specific tasks to be accomplished for the top priority items.
 - 1.3 The **Priorities Report** is designed to highlight the specific activities to be pursued for the organizational unit's top priorities that are consistent with available resources for endorsement by Trust Council at its quarterly meetings.
 - 1.4 The **Organizational Unit** includes any political or staff entity identified on the Priorities Matrix.

B. Policy

1. Follow Up Action List

- 1.1 The Follow-up Action List (FUAL) should only include specific tasks that can be reasonably accomplished over the next three months.
- 1.2 The FUAL entry should include only the key words required to prompt recall of the item and/or a reference (i.e. report, resolution number or minutes) as to where to obtain information that is more detailed.

- 1.3 FUAL entry notations should only be completed - key words, responsibility assignment, target date and time budget estimates - upon agreement between the person responsible to complete the task, and the person(s) or entity responsible for reviewing the task to ensure it has been completed.
- 1.4 Whenever possible, FUAL entries should note the expected date to complete the task in the responsibility assignment column.
- 1.5 The FUAL should be updated on a continual basis, distributed on a regular basis as determined by the relevant organizational unit, and reviewed at regular meetings of the relevant organizational unit.
- 1.6 FUAL entries should not be archived as complete or no longer required, and/or transferred to the work program, until received by the organizational unit (not an individual).
- 1.7 FUAL entries should be separated chronologically according to the organizational unit's regular or special meetings to easily track when they were identified.

2. Work Program

- 2.1 The Work Program is comprised of two components - top priority and future projects list.
- 2.2 The future projects list may be categorized by broad topic areas for the convenient indexing of specific potential work program topics.
- 2.3 Any potential project or future discussion topic may be included in the future projects list for the purposes of maintaining a record of topics raised.
- 2.4 Action on the top priority or future projects list items is subject to the organizational unit's assignment of its available time and/or assigned resources.
- 2.5 The Work Program's top priority should be identified within the future project list and then listed on the top page of the Work Program.
- 2.6 Specific activities that are to be pursued over the next 3-6 months to complete an element of a priority should be highlighted for the top priority in the Work Program.
- 2.7 Implementation of activities for top priorities is subject to available staff resources and assigned fiscal resources through the annual budget.
- 2.8 A Work Program should be forwarded by the organizational unit's designated staff person to the administrative staff when it is updated.

3. Priorities Report

- 3.1 Each organizational unit identifies a number of priorities which it may present on a quarterly basis for Trust Council's input and endorsement.
- 3.2 The top priorities of each organizational unit are extracted from the top page of the organizational unit's current Work Program.
- 3.3 An organizational unit may update its portion of the Priorities Report at any time.
- 3.4 The Executive Committee will review the current Priorities Report prior to presentation to quarterly Trust Council meetings for its recommendations relative to the listed priorities' compatibility with available resources.

C. Legislated References

Policy and Procedures Manual: Priority Setting/Review Guidelines (6.2.1)

D. Attachments/Links to Supporting Forms, Documents, Websites, Related Policies and Procedures

n/a