TOBACCO SETTLEMENT ENDOWMENT TRUST
ANNUAL WORKPLAN INSTRUCTIONS

INSTRUCTIONS
Work plans must be created annually for the upcoming fiscal grant year. For each objective, complete the template, including all other sections. ***The TSET Annual Workplan form must be used as opposed to a grantee creating their own.***

TEMPLATE
Organization Name:
Enter the name of the applicant organization.

Project Name:
Enter the name of the project requesting funding.

Program Goal:
List the overall goal that the project and funding will achieve. A **goal** is the final impact that you wish to bring about. Use words such as reduce, decrease, deliver, develop, establish, improve, increase, expand, implement, produce, or provide. The goal must related to the SMART Objective and the Outcomes.

SMART Objective(s): For the work plan, TSET requires the use of SMART objective(s) that must be completed by the end of the fiscal year. SMART objectives create a verifiable, specific trajectory towards a certain objective with clear milestones and an estimated timeline to attain. SMART is an acronym for:

Specific – All objectives must be specific about what will be achieved, what actions will be taken, what impact will occur. Avoid jargon, words, or phrases that are ambiguous, such as be aware of, explore, examine, review, etc. Use action verbs, instead. See SMART objective examples below.

Measurable – Include a measure, or metric, to monitor progress and to know when the objective has been achieved. If using a percentage as a measurement, a baseline must be established and quantifies the amount of change to be achieved. For example, Increase the number of referrals by 5%, from XX to XX. If the baseline is not included, then the percentage of increase cannot be measured.

Achievable and Ambitious – Design objectives to be challenging, but ensure that failure is not building into the objectives. The change or benefit is determined using the baseline data, outcomes found by other programs, and knowledge of the community and stakeholders.
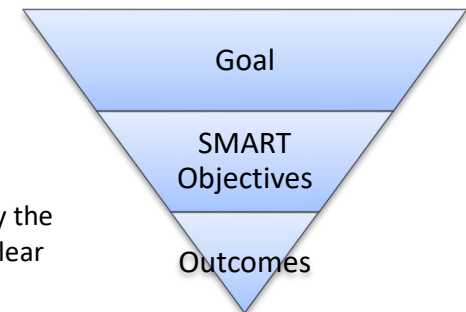
Relevant and Results-Oriented – Objective should focus on outcomes, rather than the means of achieving them. Objectives must be linked to the goals.

Time-Bound – Specifies a specific timeframe for the proposed accomplishment to be achieved.

SMART Objectives Formats

There are multiple approaches and ways to write SMART objectives. Here are some other sentence structures for objectives and/or Major Activities:

- [**Who**] will do [**what**] resulting in [**measure**] by [**when**].

- By [**when**], [**who**] will do [**what**] resulting in [**measure**].

- By [**when**], [**measure - includes who and what**].

- [**Measure – includes who and what**] by [**when**].

SMART Objective Examples

- By June 30, 20xx, increase referrals to the Oklahoma Tobacco Helpline by 50%, from 200 registered callers per month to 300 registered callers, per month.

- By June 30, 20xx: increase by 35, from 407 to 442, the hospital affiliated outpatient clinics that implement sustainable system changes to support comprehensive tobacco treatment for all patients.

- By June 30, 20xx, expand and enhance physical activity programming by at least 25% (100 to 125) from FY23.

If additional SMART objectives are needed, the applicant may add additional sections and add a different fill color for the section. Add page breaks between objectives.

Tracking Measure(s):

For each objective, list the tracking measures which are indicators of progress and relate to progress. Tracking measures may include, but not limited to, number of people trained, copies of policies, or products developed.

Data Sources:

Data sources identify where the information will be obtained for the tracking measure(s). An example could be an annual evaluation, a report, claims

data, referral reports, etc. If you are citing a change in data as your tracking measure, you will need to include the name of the surveillance system utilized.

SMART Objective for Subsequent Years:
TSET grant programs are generally funded for a three-year period. For each objective, use the SMART Objective for subsequent years' achievements. If an objective will be completed in year one and will not continue beyond year one, please indicate.

Major Activities:
List the major activities that will be conducted. Major activities should link back to the objective and further the accomplishment of the goal. Do not list minor supporting activities like attending or planning meetings, reviewing documents, ordering or purchasing, or completing reports. If additional Major Activity rows are needed, insert additional rows as necessary.

Deadline for Completion:
The deadline for completion column may be a specific date, quarterly, bi-annual, ongoing, or by the end of the fiscal year. The appropriate deadline should be used as opposed to a generic one in which all activities are to be completed by the end of the fiscal year.

Anticipated Products or Deliverables:
For each Major Activity, identify the anticipated product or deliverable that will be accomplished in the process of working to achieve the objective. Products or deliverables may include, but not be limited to, reports, data gathering, referrals, presentations, logs, fact sheets, toolkits, mid-year reports, annual reports, etc.

Names of Parties Responsible for Completing Tasks:
List the lead person(s) who will be responsible for completing each major activity, as well as the other entities who may assist. Include other internal or external collaborators who play a significant role in the completion of the Major Activity. Collaborative partnerships are defined as groups working together to create a shared vision and engage in joint strategies to address problems.