

CLAS Toolkit

Worksheet 1: CLAS Work Plan

The CLAS Work Plan is a goal and task monitoring tool that helps you stay on track with your CLAS goals and ensure the follow-through of assigned work.

Introduction

This tool is designed to track work and provide transparency around what work has been planned, is in progress, or has been completed.

How to Use

This tool is most often updated and monitored by the CLAS project manager or team leader. Ideally, the work plan is reviewed and updated at each meeting, and team members should always have access to it so that each member is aware of their assigned work, responsibilities, and deadlines for tasks that will help the team advance toward its goals. Add new rows to the plan as needs arise. You can also pre-plan your project work, using the workplan to highlight significant milestones and tasks associated with each.

- **Task/Description:** Enter the name of the task or objective. You may also break major tasks into sub-tasks by indenting, numbering, and adding additional rows beneath the primary task. Include any details necessary to help clarify the task or objective.
- **Accountable:** List the name of the individual accountable for the work getting done to agreed-upon quality measures. While it may be tempting to list several people here, ideally, this is one person to best ensure accountability. The accountable person can delegate the work to others.
- **Assigned to:** Enter names (not roles) of individuals who will execute or complete the task/objective. More than one person can be listed here.
- **Due date:** The date the task is expected or required to be completed.
- **Status:** Indicate the status of assigned tasks such as: Not Started, On Schedule, Behind Schedule, or Complete.
- **Notes/Comments:** Any additional narrative about progress, barriers, resources needed for completion, etc.
- **Evaluation Notes:** Provide details, such as timelines or possible metrics, regarding evaluating your activities.

This worksheet provides a sample CLAS Work Plan and a template. If the template doesn't have enough space for your plan, re-create it to accommodate your project's needs.

Directions

Share your organization's CLAS goals below. Remember to put your goals in SMARTIE format: specific, measurable, attainable, relevant, time-bound, inclusive, and equitable. (Refer to Worksheet 1 for more information on SMARTIE goals.) To focus your efforts and increase your chances of success, try not to set more than three goals.

Complete a work plan for each of your CLAS goals.



Expect your workplan to shift as the work unfolds. Update it accordingly and use it to check in—and stay accountable—to each other and your goals.

Example CLAS Goals:

1. By August, clinic leadership will recruit and launch a CLAS leadership council with racial, cultural, and positional diversity among its members. The council will comprise the executive director, at least two patient representatives, and 3-5 additional staff and be guided by a **transparent** and equitable governing charter.
2. By December, CLAS leadership council members will build support for CLAS initiatives by holding 10-15 one-on-one meetings with staff—representing different races, cultures, positions, and tenures—to build relationships; describe what CLAS is and why it's **essential** to our patients and organization; and better understand/address staff concerns and questions.
3. By December, the CLAS leadership council will lead a project to identify which language (other than English) is spoken most commonly by our patients and, by December 31, 2025, translate the 10 most used clinic resources (written and auditory) into that language. Staff will be trained **to direct patients to these resources, which** will be made available on our website as appropriate. This project will engage our CLAS leadership council, clinic leadership, staff, and patients who speak languages other than English.

Example CLAS Work Plan

Goal:		By August, clinic leadership will recruit and launch a CLAS leadership council—with racial, cultural, and positional diversity among its members—comprised of the Executive Director, at least two patient representatives, and 3-5 additional staff and guided by a clear and equitable governing charter.				
Task / Description		Accountable	Assigned To	Due Date	Status ¹	Notes / Comments
1	Draft council charter	Juanita	Courtney	February 15	On Schedule	Charter template found here ; amend as needed.
2	Identify staff and patients to recruit, ensuring a diversity of perspectives across race, ethnicity and position	Juanita	Courtney	March 15	On Schedule	Funding for participant stipends is recommended. Juanita looking into possibility and will follow-up with Courtney by February 1.
3	Develop any materials needed for council recruitment	Juanita	Juanita and Courtney	April 1	On Schedule	
4	Hold one-on-one meetings to recruit members; track key demographics to ensure diversity across members	Juanita	Juanita and Courtney	May 15	Behind Schedule	Admin support from Michael as needed.
5	Identify council meeting dates/times for next six months; send out calendar holds	Juanita	Michael	June 1	Not Yet Started	
6	Design kickoff meeting (with input from council members); send out meeting agenda/prep materials	Juanita	Juanita and Courtney, with input from council	July 1	Not Yet Started	
7	Hold kickoff meeting	Juanita	Full Council	August 31	Not Yet Started	
Evaluation Notes:		Put on Board agenda for June. Short survey as part of kickoff meeting.				

¹Status: Not Yet Started, On Schedule, Behind Schedule, Complete

CLAS Work Plan Template

Goal:						
Task / Description		Accountable	Assigned To	Due Date	Status ¹	Notes / Comments
1						
2						
3						
4						
5						
6						
7						
	Evaluation Plan:					

¹Status: Not Yet Started, On Schedule, Behind Schedule, Complete