

Operations Plan (Template)

Purpose: To plan out every known detail of the project, activity by activity, on paper, and surface all remaining, unanswered questions. This will ensure all partners have a common understanding of the project, and will prevent, to the extent possible, of the project being tripped up by unanticipated “surprises.” Remember that we are still testing assumptions in three areas: 1) customer desirability, 2) operational feasibility, and 3) financial viability. The Operations Plan can also be used to create performance metrics.

Note: There is a difference between untested assumptions and remaining questions. **Untested assumptions** are when . . . 1) you can't foresee all of the impacts of how your solution will play out, 2) it is hard to predict how people will react to your solution or your "ask," 3) you are using a technology, system, strategy, etc. that is unproven . . . and so forth. **Questions** are more factual and can be answered by your discussions and/or research, such as What will our criteria be? Are there rules that impact how we will do X? Who will we reach out to? etc.

Template:

A. Summary of project, including the focus question we are answering

B. List of key partners and their roles/expertise

C. Activity-by-Activity Plan

Operational Activities

Activity title	Activity details
Routing, g,	
Scheduling	
Vehicles	
ADA requirements	
Capacity	
Service area	
Etc.	

Customer-Facing Activities

Activity title	Activity details
Ride request process	
Website	
Call center	
Fares	
Passes	
Marketing	
etc.	

Financial Sustainability

Activity title	Activity details
Fixed costs (e.g., capital purchases)	
Variable costs (e.g., personnel)	
Other costs	
Funders	
Funder requirements	
Etc.	

Performance Metrics (may not apply to all activities)

Activity title	Desired outcome (target metric)	Method by which performance will be measured

