

# Task Planning Worksheet

Adapt this worksheet to meet your specific needs. It can be used to help organize chores, tasks, or specific jobs. The worksheet is ideal for tasks that need to be completed on a regular basis.

Keep in mind that divvying up work can be stressful. Be prepared for the conversation. Have a sample plan, ample time, and an open mind.

Take a moment to list all of the things that have to be done on a regular basis. Make sure to list things that are currently being done effectively and things that might not be getting done on a regular basis.

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Which tasks needs to be done on a daily basis?

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Which tasks needs to be done on a weekly basis?

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Which tasks needs to be done on a monthly basis?

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Which tasks needs to be done on a quarterly basis?

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Which tasks needs to be done on an annual basis?

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**Tip:** Determine who will be responsible for each of the tasks. Take time to discuss everyone’s strengths and whether they might be the best fit for a particular task.

The goal of this part of the exercise is clarity—everyone should be aware of how many tasks need to be accomplished and who is responsible for what.

**Name:**

Tasks:

**Name:**

Tasks:

**Name:**

Tasks:

**Name:**

Tasks:

**Name:**

Tasks:

**Name:**

Tasks:

Suggestion: Complete this exercise verbally and have someone designated as a transcriber write all of the answers on one Master Worksheet. Alternatively, have everyone complete the first portion of the worksheet individually and then as a group discuss and decide on who is responsible for which tasks.