



An action plan is a document that outlines specific steps that need to be completed in order for an individual or a group to accomplish identified outcomes. Action plans include the following information:

- Outcome – what change do you want to see?
- Goal(s), objective(s), and action steps
- Resources
- Person responsible
- Evaluation – Criteria for Success



Develop an action plan

- Identify your specific goal based on your outcome
- Identify specific objectives related to goal
- Develop specific action steps to help you meet your goal
- Identify resources that already exist or that are needed
- Develop specific timelines for each action step
- Identify person responsible for each action step
- Identify criteria for success



Each action plan should be achievable in one year.

## Example Action Plan Goal, Objective and Action Steps

**GOAL:** Each workgroup for the state CSPD will have atleast one family member.

**OBJECTIVE:** Recruit interested family partners to participate on state CSPD workgroups.

**ACTION STEPS:**

- Develop an orientation for onboarding members to the state CSPD
- Develop a list of family organizations to recruit family members, including diverse families (*age of child, experience in EI/ECSE, leadership experience, etc.*)
- Develop a recruitment flyer that explains the role, commitment and expectations
- Research available funding to support family's participation and develop a mechanism to administer funds
- Set a date for the orientation, conduct the orientation
- Develop a role description for the family member that includes responsibilities, commitment and expectations
- Evaluate family interest, knowledge and availability to participate for one year.
- Confirm commitment, if interested assign workgroup, share contact information with chair of workgroup
- Develop a mechanism for ongoing support for family team members

Please note, due to space limitations, this sample does not include target initiation dates(s), deadline(s) or person(s) responsible

# Process for Developing an Action Plan



Objective:

- Create an action plan

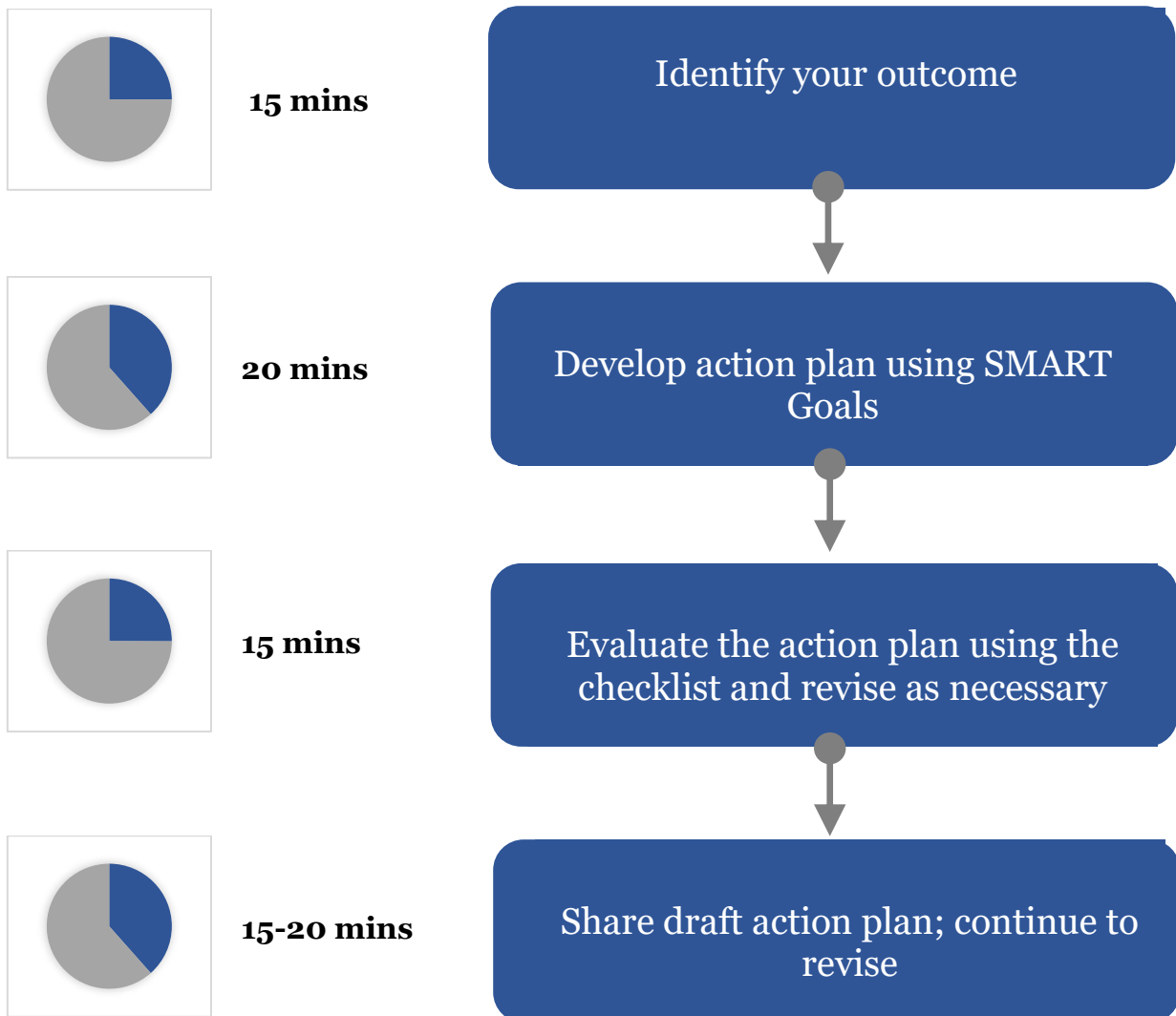


Materials:

- Action plan template
- Action planning checklist & evaluation



Time: 60-75 minutes



# Action Plan: developing a plan

## 1. Identify your outcome (15 mins.)



- *What change do you want to see?*
- *What do you want to do? Be specific.*
- *How will the goal of your action plan assure you accomplish your desired outcome?*
- *Does the outcome fit with the needs of your community? Is someone else already doing it? Any lessons learned from past efforts (reduces duplication, assures need)?*

## 2. Develop an action plan (20 mins.)



- *To start, draft one goal, one to three objectives per goal, and four to ten action steps per objective (be specific).*
  - *Be sure to use SMART goals; specific, measurable, achievable, relevant, and time bound.*
- *Assign a target initiation date, deadline, and person responsible for each action step.*
  - *This is where you bring in additional people to assist you to complete your plan.*
- *An action plan must be achievable in one year.*

## 3. Evaluate the action plan using the checklist and revise as necessary (15 mins.)



- *Using the action plan checklist, and the rubric to evaluate your action plan; identify areas for revision and list future considerations.*
- *Action plan can be updated as needed, remember your goal is to write an action plan that can be completed within one year.*

## 4. Revise draft action plan (15-20 mins.)



- *Revise the action plan as necessary based on the evaluation checklist and the rubric for evaluating an action plan.*
  - *The future considerations will assist you as you move forward with your plan.*
- *If you have time, ask someone else to review your plan and offer feedback for revisions.*



Starting with the outcome in mind, developing SMART goals will help you develop an action plan that leads to success.



# Action plan checklist

**Use this checklist to evaluate the action plan. Check the box if the action plan meets the criteria.**

- 1** The goal(s) in the action plan are achievable in one year.
- 2** Each goal has one or more objectives.
- 3** Each objective has four or more action steps.
- 4** Responsibility is assigned to a specific individual for each action step outlined in the action plan.
- 5** A target initiation date is set for each action step in the action plan.
- 6** A deadline date is set for each action step in the action plan.
- 7** Each action step is measurable.



# ECPC Rubric

## Evaluating an Action Plan

**Directions:** Place a check in the interactive box to evaluate the quality of your action plan and list any future considerations.

Criteria	Yes	No	Future Considerations
<b>Goal(s):</b> The goal(s) in the plan is clear and achievable in one year.	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Objectives:</b> Objectives in the plan are directly related to a goal ( <i>e.g. alignment of personnel standards</i> )	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Activities:</b> Activities in the plan are directly related to an objective ( <i>e.g. survey IHE programs</i> )	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Sequence:</b> Each objective and activity are logically sequenced for achievement of a goal	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Criteria:</b> Each objective and activity include clear and measurable criteria for achievement	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Timelines for Completion:</b> Each objective and activity include a measurable timeline for milestones, data collection, completion and achievement	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Resources Needed:</b> Each objective and activity include a description and list of resources needed for meeting criteria, timelines and achievement	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Person(s) Responsible:</b> Each objective and activity include a designated person or group who will be responsible for completing the objective and/or the activity	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Progress Monitoring:</b> Each objective and activity includes a schedule for progress monitoring of benchmarks and outputs to facilitate the revision of the action plan (as necessary)	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Evaluation:</b> Each goal(s) on the action plan will have a data collection schedule to document, measure, and analyze all outputs and results/outcomes	<input type="checkbox"/>	<input type="checkbox"/>	

## LEADERSHIP ACTION PLAN

<b>NAME:</b>	<b>AFILIATION:</b>	<b>PERIOD COVERED:</b>
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Goals/Objectives/ Activities	Person(s) Responsible	Resources (Needed)	Outcome	Projected Date of Completion	Criteria for Success
<b>GOAL 1.</b>					
Objective 1.1					
Activity 1.1.1.					
Activity 1.1.2.					
Objective 1.2.					
Activity 1.2.1.					
Activity 1.2.2.					
<b>GOAL 2.</b>					
Objective 2.1.					
Activity 2.1.1					
Activity 2.1.2					
Objective 2.2.					
Activity 2.2.1					
Activity 2.2.2					