**

**Developing an Action Plan**

**Process and Evaluation Tools**

What is an Action Plan?

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
* Projected date of completion (for each action step)
* 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

The action plan should be achievable in one year.

**Tip:** Develop timelines that are realistic and achievable within the timeframe identified. It is recommended that timelines do not shift dramatically.

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# Action Plan: developing a plan

1. **Identify your outcome**

* *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**

* *To start, draft one goal, one to three objectives per goal, and four to six 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**

* *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**

* *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.

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**DEVELOPING SMART GOALS**


# Action plan checklist

**Use this checklist to evaluate the action plan.**

**Check the box if the action plan meets the criteria.**

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

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**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** |
| **Goal(s):** The goal(s) in the plan is clear and achievable in one year. | [ ]  | [ ]  |  |
| **Objectives**: Objectives in the plan are directly related to a goal. | [ ]  | [ ]  |  |
| **Activities:** Activities in the plan are directly related to an objective. | [ ]  | [ ]  |  |
| **Sequence:** Each objective and activity are logically sequenced for achievement of a goal. | [ ]  | [ ]  |  |
| **Criteria:** Each objective and activity include clear and measurable criteria for achievement. | [ ]  | [ ]  |  |
| **Timelines for Completion:** Each objective and activity include a measurable timeline for milestones, data collection, completion, and achievement. | [ ]  | [ ]  |  |
| **Resources Needed:** Each objective and activity include a description and list of resources needed for meeting criteria, timelines, and achievement. | [ ]  | [ ]  |  |
| **Person(s) Responsible:** Each objective and activity include a designated person or group who will be responsible for completing the objective and/or the activity. | [ ]  | [ ]  |  |
| **Progress Monitoring:** Each objective and activity includes a schedule for progress monitoring of benchmarks and outputs to facilitate the revision of the action plan (as necessary). | [ ]  | [ ]  |  |
| **Evaluation:** Each goal(s) on the action plan will have a data collection schedule to document, measure, and analyze all outputs and results/outcomes.  | [ ]  | [ ]  |  |

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**Leadership Action Plan**

|  |  |  |
| --- | --- | --- |
| **Name:** | **Afiliation:** | **Period Covered:** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Goals/Objectives/ Activities** | **Person(s)** **Responsible** | **Resources (Needed)** | **Outcome** | **Projected Date of Completion** | **Criteria for Success** |
| **GOAL 1.** |  |  |  |  |  |
| Objective 1.1 |  |  |  |  |  |
| Activity 1.1.1. |  |  |  |  |  |
| Activity 1.1.2. |  |  |  |  |  |
| Objective 1.2. |  |  |  |  |  |
| Activity 1.2.1. |  |  |  |  |  |
| Activity 1.2.2. |  |  |  |  |  |
| **GOAL 2.** |  |  |  |  |  |
| Objective 2.1. |  |  |  |  |  |
| Activity 2.1.1 |  |  |  |  |  |
| Activity 2.1.2 |  |  |  |  |  |
| Objective 2.2. |  |  |  |  |  |
| Activity 2.2.1 |  |  |  |  |  |
| Activity 2.2.2 |  |  |  |  |  |

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