Action Plan Worksheet

## Using the Action Plan

The action plan is expressed in terms of goals, objectives, and activities with expected results. It includes a target date for each activity, a description of key resources needed, and establishes accountabilities. A carefully designed and well-written action plan provides a solid basis for project evaluation.

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| **GOAL STATEMENT**  Begin with your goal. This is a broad statement of what you hope to accomplish and your approach. The statement includes two parts: a “to” and a “by or through” phrase. The “to” portion refers to what you hope to accomplish and the “by or through” phrase summarizes the approach you will take to accomplish the goal. |
| *Ex. To decrease the percentage of Badger County residents that are overweight or obese by increasing physical activity options and healthier food choices.* |
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| **OBJECTIVES**  Next, write your objectives. These are specific and measurable end-products of the intervention often expressed in terms of changes in behavior, norms, knowledge, attitudes, capacities, or conditions. You might have one or multiple objectives outlined for your goal. Always make sure that your objectives are SMART: Specific, Measurable, Attainable, Realistic, Time-bound. [How to Create SMART Goals Using a Tree Diagram](http://www.countyhealthrankings.org/resources/how-create-smart-goals-using-tree-diagram) and the [Tree Diagram template](http://www.countyhealthrankings.org/resources/tree-diagram-template) (PDFs from SMART *Learning Systems*) may help you graphically create and organize measurable objectives with specific targets. |
| *Ex. By March 30, 2013, Badger High School will adopt a healthier vending policy, with 100% of options meeting adopted nutritional standards.* |
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| **INDICATOR**  Next, jot down what you might measure to determine whether changes have occurred. This step serves as a quick check to assure that your objectives are truly measurable. | |
| **Objective:** | **Indicators:** |
| *Ex. By March 30, 2013, Badger High School will adopt a healthier vending policy, with 100% of options meeting adopted nutritional standards.* | * *Policy with nutritional standards is in place.* * *Inventory of snack items in vending machines* * *% of snack items meeting adapted nutritional standards* * *Vending company sales reports* |
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| **COMMUNICATION NEEDS**  Then, record the communication target/s you need to reach to achieve your objective, the approach/es you will use to reach them, and the purpose of the communication. In the next step (step 5) you will include these communication activities in the activity column of the action plan template.  NOTE: If you used [Spitfire Strategies Smart Chart 3.0](http://www.countyhealthrankings.org/resources/smart-chart-30) to create your communications strategy, bring this information to the Action Plan. If you haven’t used it yet, consider using the SMART Chart to make and assess strategic communications decisions. | | | |
| **Example Objective** | **Target Audience** | **Message** | **Tactics** |
| *Ex. By March 30, 2013, Badger High School will adopt a healthier vending policy, with 100% of options meeting adopted nutritional standards.* | *School Principal* | *A healthier school vending policy will help students focus better in the classroom.* | *In-person meeting* |
| *Community members* | *The Healthy Badger County coalition is working on a healthier school vending policy that will make the healthy choice the easy choice for our kids.* | *Local media event, social media messaging* |
| **Objective 1** | **Target Audience** | **Message** | **Tactics** |
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| **Objective 2** | **Target Audience** | **Message** | **Tactics** |
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| **Objective 3** | **Target Audience** | **Message** | **Tactics** |
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| **ACTIVITIES: PLANNING & MONITORING**  Now, outline the steps you will take to achieve each objective. The activities are the “how” portion of the action plan. It is best to arrange activities chronologically by start dates. Place each activity in a separate row and add as many rows as you need to the template. For each activity include the timeframe (start and end), resources required, lead, expected results or products, and date completed to help you track your progress. | | | | | |
| **Objective (example)**  ***By March 30, 2013, Badger High School will adopt a healthier vending policy, with 100% of options meeting adopted nutritional standards.*** | | | | | |
| **Activity** | **Timeframe** | **Resources Required** | **Lead** | **Anticipated Products or Results** | **Date Completed** |
| *Ex. Develop fact sheets and talking points based on core message* | *Start: Jan. 2013*  *End: Feb. 2013* | *20 hours staff time*  *Desktop publishing software*  *Printing supplies* | *James Jones, American Heart Association* | *Fact sheets and talking points documents (one for each target audience)* | *Feb. 27, 2013* |
| **Objective 1** | | | | | |
| **Activity** | **Timeframe** | **Resources Required** | **Lead** | **Anticipated Products or Results** | **Date Completed** |
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| **Objective 2** | | | | | |
| **Activity** | **Timeframe** | **Resources Required** | **Lead** | **Anticipated Products or Results** | **Date Completed** |
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| **Objective 3** | | | | | |
| **Activity** | **Timeframe** | **Resources Required** | **Lead** | **Anticipated Products or Results** | **Date Completed** |
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| **ACTIVITIES: SEQUENCING**  If you need to sequence many activities in parallel, consider using a Gantt chart to show beginning and ending times and how activities overlap. This is sometimes easier to do in an Excel spreadsheet. You can download a free Gantt Chart template [here](http://www.countyhealthrankings.org/resources/gantt-chart-template). | | | | | | | | | | |
| **Objective (example)**  **By March 30, 2013, Badger High School will adopt a healthier vending policy, with 100% of options meeting adopted nutritional standards.** | | | | | | | | | | |
|  | **Dates** | | | | | | | | | |
| **Activity** | 1/7/13 | 1/14/13 | 1/21/13 | 1/28/13 | 2/4/13 | 2/11/13 | 2/18/13 | 2/25/13 | 3/4/13 | 3/11/13 |
| *Develop fact sheets and talking points based on core message.* |  |  |  |  |  |  |  |  |  |  |
| *Inventory snack items in vending machines in each school.* |  |  |  |  |  |  |  |  |  |  |
| *Identify credible people to meet with school board members.* |  |  |  |  |  |  |  |  |  |  |
| *Schedule individual school board member meetings.* |  |  |  |  |  |  |  |  |  |  |

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| **Objective 1** | | | | | | | | | | |
|  | **Dates** | | | | | | | | | |
| **Activity** |  |  |  |  |  |  |  |  |  |  |
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| **Objective 2** | | | | | | | | | | |
|  | **Dates** | | | | | | | | | |
| **Activity** |  |  |  |  |  |  |  |  |  |  |
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| **Objective 3** | | | | | | | | | | |
|  | **Dates** | | | | | | | | | |
| **Activity** |  |  |  |  |  |  |  |  |  |  |
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*Adapted from the* [*Healthy Wisconsin Leadership Institute Community Health Improvement Toolkit*](http://www.hwli.org/chip-toolkit/)*.*