

Action Planning Process

Action Planning

PARTICIPANT'S WORKBOOK

1. STRATEGY

Write in the name of the strategy.

ADVANTAGES

2. STRENGTHS

In implementing this strategy at this time, we have the following strengths:

P
R
E
S
E
N
T

LIMITS

3. WEAKNESSES

In implementing this strategy at this time, we have the following weaknesses:

4. BENEFITS

in the future of implementing this strategy are:

F
U
T
U
R
E

5. DANGERS

in the future of implementing this strategy are:

6. POSSIBLE ACCOMPLISHMENTS

Brainstorm possible accomplishments for this time period that build on the advantages and acknowledge the limits.

7. MEASURABLE ACCOMPLISHMENT

Choose an accomplishment which

- is catalytic
- is realistic
- will have a substantial impact
- will inspire commitment and action.

Taking all the above into consideration, we are committed to the following measurable accomplishment by _____ (date)

8. STRATEGY

Write the name of the strategy on this line.

9. MEASURABLE ACCOMPLISHMENT

Write the measurable accomplishment that you are committed to on this line (from step 7).

10. SPECIFIC ACTIONS

List the specific actions needed to complete the measurable accomplishment indicated above.

11. If there are more than ten actions listed in step 10 organize them into clusters that are similar in their action focus.
Each cluster should represent a distinct action step.
12. Number the actions in each cluster in the sequence that you will do them.

13. IMAGE/SLOGAN

Create a motivating image or slogan for this action campaign

14. STRATEGY

Write the name of the strategy on this line.

16. ACTION TIMELINE

Divide the timeline into the appropriate number of blocks and write the actions (from step 12) that you have selected in the appropriate timeblock on this timeline.

15. MEASURABLE ACCOMPLISHMENT

Copy from step 7.

17. IMPLEMENTING TEAM

Who will be responsible for implementing this action plan? (at least one person in the planning group; name, not roles)

18. COSTS

Write the costs (time and money) of implementing this action plan on lines below:

MONEY _____

TIME _____

Action Planning

WORKBOOK EXAMPLE

1. STRATEGY

Write in the name of the strategy.

Recruiting Hospital Volunteers

ADVANTAGES**2. STRENGTHS**

In implementing this strategy at this time, we have the following strengths:

*we have a good track record
we have lots of patient needs
the job is rewarding
our board knows a lot of influential people*

LIMITS**3. WEAKNESSES**

In implementing this strategy at this time, we have the following weaknesses:

*we don't have any budget to support volunteers
we don't have a volunteer supervisor
we don't have an obvious pool of possible volunteers to draw on*

4. BENEFITS

in the future of implementing this strategy are:

*Involving the community in the hospital so they have some ownership
meeting more patient needs
relieving some of the burden of nurses and other health care professionals*

5. DANGERS

in the future of implementing this strategy are:

*The unions could get upset if there are too many volunteers taking over their work
unsupervised volunteers could do harm to patients*

6. POSSIBLE ACCOMPLISHMENTS

Brainstorm possible accomplishments for this time period that build on the advantages and acknowledge the limits.

We could

have a really well-thought-thru plan for a new volunteer program to propose to the hospital board

have a hundred new volunteers

be ready to implement a new program

have held a volunteer recruitment meeting

have done a volunteer training session

7. MEASURABLE ACCOMPLISHMENT

Choose an accomplishment which

- is catalytic
- is realistic
- will have a substantial impact
- will inspire commitment and action.

Taking all the above into consideration, we are committed to the following measurable accomplishment by January 1 (date)

20 new well trained volunteers working

8. STRATEGY

Recruiting Hospital Volunteers

Write the name of the strategy on this line.

9. MEASURABLE ACCOMPLISHMENT

20 new well trained volunteers working

Write the measurable accomplishment that you are committed to on this line (from step 7).

10. SPECIFIC ACTIONS

List the specific actions needed to complete the measurable accomplishment indicated above.

11. If there are more than ten actions listed in step 10 organize them into clusters that are similar in their action focus.
Each cluster should represent a distinct action step.
12. Number the actions in each cluster in the sequence that you will do them.

1. *evaluate current volunteer program*
2. *design new program*
5. *recruit volunteers*
- 4.. *write a news article*
3. *contact the Life editor from the Star about an article (Ed knows her)*
- 5a. *post an ad in the community newspaper*
7. *design a training/orientation program*
6. *talk with prospects*
6. *do background checks on new volunteer recruits*
8. *make decision about supervision of volunteers*
9. *do the training program*
10. *schedule the new volunteers*
11. *have a welcoming celebration for the new volunteers*

13. IMAGE/SLOGAN

Create a motivating image or slogan for this action campaign

Have a heart, volunteer!

14. STRATEGY*Recruiting Hospital Volunteers*

Write the name of the strategy on this line.

16. ACTION TIMELINE

Divide the timeline into the appropriate number of blocks and write the actions (from step 12) that you have selected in the appropriate timeblock on this timeline.

Nov 3-9	Nov 10-16	Nov 17-23	Nov 24-30	Dec 1-7	Dec 8-14	Dec 15-21	Dec 22-28
1. evaluate current volunteer program	2. design new program 3. contact the Life editor from the Star about an article (Ed knows her)	4.. write a news article 5. recruit volunteers	5. recruit volunteers (continued) 5a. post an ad in the community newspaper	6. talk with prospects 6. do background checks on new volunteer recruits	7. design a training/orientation program 8. make decision about supervision of volunteers	9. do the training program 10. schedule the new volunteers	11. have a welcoming celebration for the new volunteers

15. MEASURABLE ACCOMPLISHMENT

Copy from step 7.

We will have 20 new well trained volunteers working by January 1

17. IMPLEMENTING TEAM

Who will be responsible for implementing this action plan? (at least one person in the planning group; name, not roles)

*Ed (our director), Sheila, Ahmed, Sam***18. COSTS**

Write the costs (time and money) of implementing this action plan on lines below:

MONEY *\$1000 for ads, training session food, celebration. The time is covered in our salaries and job descriptions.*

TIME *About 100 hours of staff time*

Action Planning

FACILITATOR'S MANUAL

Action Planning Procedures - Overview

WHOLE GROUP

INTRODUCTION

Copy Action Planning manual for each participant.

1. Open the workshop

2. Give the context



3. Determine the time span of the planning period

4. Make assignments to action planning teams

5. Introduce the action planning manual:

- Write "finishing date" on line 7
- Divide timeline in step 16 into time blocks and label with dates

6. Tell people how much time they have to work.

40 min.

RATIONAL AIM(S)

clear, step-by-step action plans for each strategic direction; a coordinated overall action plan

EXPERIENTIAL AIM(S)

commitment to a defined task; motivation to accomplish tasks

ACTION PLANNING PARTICIPANT'S WORKBOOK

DETERMINE THE MEASURABLE ACCOMPLISHMENT

1. Write the name of the Strategy on the line.
2. List strengths
3. List weaknesses
4. List benefits
5. List dangers
6. Brainstorm possible accomplishments...
7. Write down Measurable Accomplishment by...(date)

30 min.

DECIDE ON THE SPECIFIC ACTIONS

8. Write down Strategy
9. Copy Measurable Accomplishment (from step 7).
10. List the specific actions...
11. If more than ten actions are listed in step 10, organize into clusters...
12. Number cluster actions...
13. Create a motivating image or slogan...

20 min.

CREATE THE ACTION TIMELINE

14. Write down Strategy
 15. Copy Meas. Acc.
 16. Write actions in timeline
 17. Name Implementation Team
 18. Write down costs
- Write Meas. Acc. from 15, each action from 16, Imple. Team from 17, Cost from 18, each on a separate card. Put on wall timeline for plenary session. Add slogan or symbol if the team has one.

30 min.

WHOLE GROUP

COORDINATE THE GROUP'S PLANS

INTRODUCE THE PLENARY PROCESS

ONE TEAM REPORTS (uninterrupted)

1. Meas. Accompl.
2. Quick summary of actions
3. Cost
4. Implementing team
5. Slogan/symbol

WHOLE GROUP RESPONDS

1. Questions of clarity
2. Is this the accomplishment we need? (adjust)
3. Are these the actions that will make it happen? (adjust)
4. Celebrate!

Repeat for each team.

FINAL CONSENSUS

1. Is this the overall plan we need? (adjust)
2. Celebrate!

90 min.

CONCLUSION

REFLECT ON THE WORKSHOP

NEXT STEPS

- Documenting
- Evaluating progress

ANNOUNCEMENTS

CLOSING

30 min.

Action Planning Hints

This workbook takes the participants through the process of action planning in clearly delineated steps. It is important that the participants in the workshop do not take shortcuts, but it is not helpful to them to get bogged down in any single step. The following hints indicate the key to each step. In all cases, the primary intent is to enable the creation of action plans that are realistic and can be implemented.

Participants should be encouraged to risk and be bold. The main point of this process is creating a workable plan that advances the strategic objective.

Whole group:

STEP: Introduction

HINTS:

Materials needed:

- 5x8" cards, approx. 15 per action plan
- wide markers
- masking tape or "Hold-it"
- large paper
- pencils
- action planning manual for each participant

3. The optimum time span is 3-6 months. An upcoming event may provide a point of focus. Be prepared with a suggestion.
4. Assignments may be predetermined or voluntary. It is best if people plan for what *they* will do. 3 to 4 people per team is optimum.
5. Time blocks may be any length, but smaller blocks encourage specific actions that will be done. An overhead will help show people how to do this.

40 min.

Action planning teams:

Determine the Measurable Accomplishment

1. Writing the name of the Strategy is for the sake of clarity on the focus and for later reference.
2. Factors that are favourable to implementing this Strategy.
3. Factors that limit the implementation of this Strategy.
4. Real benefits of achieving this Strategy.
5. Real dangers that could arise related to the implementation of this Strategy.
6. Brainstorm possible accomplishments.
7. Choose a Measurable Accomplishment that takes these factors into consideration, inspires the group, and can be implemented within the time frame agreed by the group. The group should be able to say how they will know if it has been accomplished. You may use the discussion method to evaluate the possible accomplishments and choose the most catalytic one. Writing the date provides the point of reference.

continued on next page

30 min.

Action Planning Hints (continued)

Action planning teams:

Determine the Measurable Accomplishment (continued)

7. See page 40

7. A sample conversation for choosing the Measurable Accomplishment:

O – Read the list of Possible Accomplishments aloud.

R – Quick impressions: Which are exciting? scary? take the most energy? least? easiest? hardest? cheapest? most expensive? take advantage of our strengths? our weaknesses? break inertia? galvanize new action or enthusiasm? e.g. Which one has to occur before another? Other examples of that?

I – What do our options seem to be? What do we have to win on?

D – Which one are we most committed to completing by (date)? How can we state that as a “measurable accomplishment”?

Line 7 in the Action Planning Workbook asks for a “measurable accomplishment”, a short-term objective for the action plan. Many people find this a difficult concept.

The first challenge is stating something as an accomplishment or an outcome rather than an action. The following examples may help the facilitator explain the concept to participants: they are not “right” answers.

The second challenge is stating an accomplishment in a way that its achievement (or lack of it) can be measured or demonstrated. Often it is helpful to ask “If I (or another outsider) came back at the end of your action plan and asked you to show me that you have been successful, what would you show me?” The following examples may help with the concept: they are not “right” answers.

EXAMPLE

<i>(Better)</i> ACCOMPLISHMENT/OUTCOME (MEASURABLE)	<i>(Rather than)</i> ACTION
Conference plan	Plan the conference
20 volunteers working	Recruit volunteers
5 funding proposals submitted	Increase funding
Have held one team meeting per month	Increase team communication

EXAMPLE

<i>(Better)</i> MEASURABLE	<i>(Rather than)</i> VAGUE
\$20,000 income in 3 months	Increased income
5 funding proposals submitted	Increased income
5 specific thank-you's from clients	Satisfied clients
Conference evaluations average 3 or above on a 5-point scale	Successful conference
Report printed and distributed	A report

Action Planning Hints (continued)

Action planning teams:

STEP: **Decide on the specific actions**

HINTS:

8. Writing the name of the Strategy is for the sake of clarity on the focus and for later reference.
9. Copy Measurable Accomplishment from step 7. This is for the sake of clarity on the focus and for later reference.
10. Actions need to be specific and concrete—things that can be done in a few days or less.
11. If clustering is done, it should reflect momentum toward a particular accomplishment.
12. The sequence should reflect the order in which actions need to be done.
13. The slogan or visual image should reflect the spirit of the action plan.

20 min.

Create the action timeline

14. Writing the name of the Strategy is for the sake of clarity on the focus and for later reference.
15. Copy Measurable Accomplishment from step 7.
16. This is where the sequencing in step 12 is placed on an action calendar. The key is to make it realistic and workable. Put actions in the time block where you will begin them.

The timeline is depicted in time blocks. This should have been done in the introduction to the workshop.
17. Name the specific individuals and/or groups who are responsible for implementation.
18. The most realistic estimate possible of cost in terms of money and time will enable a check on the realism of the action plan and enable allocation of human and financial resources.

30 min.

Write the Measurable Accomplishment from step 15, each action from step 16, the Implementing Team from step 17, the Cost from step 18—each on a separate card. Put on wall timeline for plenary session. Add slogan or symbol if the team has one.

Action Planning Hints (continued)

Whole group:

STEP: Coordinate the group's plans

HINTS:

The object of the plenary is to give everyone the whole picture of the plans, to refine plans where necessary, and to coordinate actions and events for greater effectiveness.

INTRODUCE THE PLENARY PROCESS

The facilitator puts the following process on a flipchart, then follows the process team by team, letting each team finish its report before the whole group responds.

ONE TEAM REPORTS (uninterrupted)

1. Measurable Accomplishment: By ... (date), we are committed to ... (measurable accomplishment read from the card)
2. Quick summary of actions... (read the cards and make a brief explanation)
3. The cost of this action plan is... (read from the card)
4. The team that will implement this action plan is... (read from the card)
5. Slogan/symbol (if the group has created one)

90 min.

WHOLE GROUP RESPONDS

After each report, the facilitator asks the whole group the following questions:

1. *Are there questions of clarity?* ("Please explain what you mean by ...?") It is important that other types of questions wait until the group clearly understands the report.
2. *Is this the measurable accomplishment we need for this strategic direction? Is it bold enough? Is it possible?* Adjust if necessary. This is where questions of the content are appropriate. It must be clear that it is the content of the action plan itself that is being discussed rather than the team of people who created it. Do not remove or change items unless there is a clear group consensus to do so.
3. *Will these actions enable us to complete the Measurable Accomplishment?* Actions may be added or moved around if necessary at this point. Do not remove or change items unless there is a clear group consensus.

4. Celebrate! (with applause)

Repeat this series of questions for each team's report.

FINAL CONSENSUS

Following all the reports, ask the group, "Is this the overall plan we need?" This is the time to look at the plan as a whole. Ask the group to look at the actions within each time block. There may be modifications. Be sure that any changes are a group consensus.

Celebrate!

Action Planning Hints (continued)

Whole group:

STEP: Conclusion

HINTS:

This part of the workshop is of critical importance to the overall process in that it enables the participants to internalize and integrate what has happened to them. Careful planning and monitoring of time throughout the workshop will enable the facilitator to avoid sacrificing or reducing the time devoted to this part of the session.

30 min.

REFLECT ON THE WORKSHOP

A conversation enables the group to reflect on the plan and the experience of creating it. The questions are designed to flow with the thought process from the most objective to the most interpretive.

- What words or particular actions in this plan catch your attention?
- Which part of this plan is most exciting for you?
- Which parts do you feel confident about?
- Which will be the easiest to implement?
- Which parts are you least confident about?
- Which will be the most difficult?
- What differences will this Action Plan make for the organization or community?
- How are we (as a group) different now than we were when we first began this session?
- How will we be different when we finish all these plans?
- Imagine this whole plan as a movie or a play. What title would you give it?

NEXT STEPS

Ask the group what the next steps are. This includes copying, producing and distributing the timeline. The group may want to schedule meetings (not on the action timeline) to evaluate progress and make modifications, etc.

ANNOUNCEMENTS

This is the time to make any other announcements that the group needs to hear.

CLOSING