

Action Planning

HOW TO CREATE EFFECTIVE & EFFICIENT GOALS

This material, in part, comes from Robert Mager's book, *Goal Analysis: How to clarify your goals so you can actually achieve them.*

What is an action plan?



A roadmap to where
you are going.

"Would you tell me, please, which way I ought to go from here?"

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where--" said Alice.

"Then it doesn't matter which way you go," said the Cat.

"--so long as I get SOMEWHERE," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

--From Alice in Wonderland by Lewis Carroll

How do we get there?



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Tiered Supports Team Process



Action Plans

- Help maintain focus on achieving goals by answering:
 - What
 - By Who
 - How
 - By When
- Require regular review and revision
- Should be referred to during meetings

What's it all about?

A common question is, “What should we do?”

The answer is, “Find out what you are trying to accomplish first.”

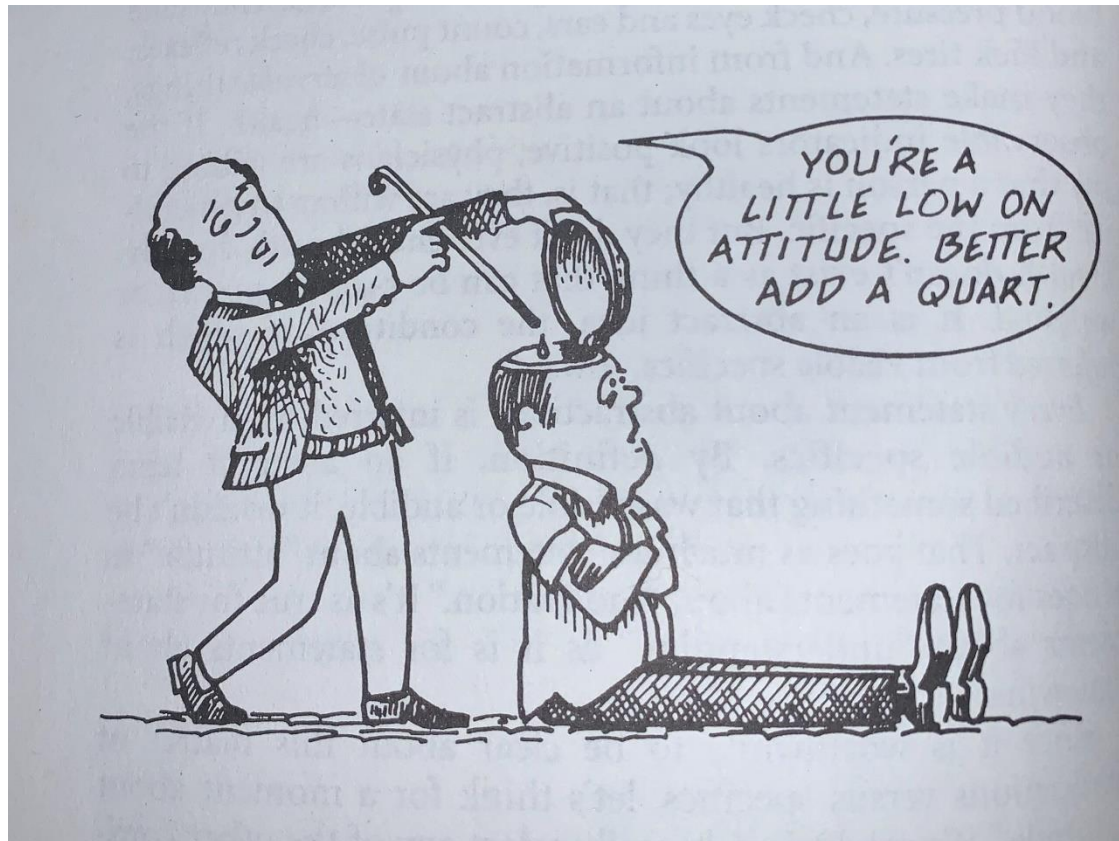
What is a goal?

A statement describing a broad or abstract intent or condition; something we aim for or desire.



What are “fuzzies”?

Fuzzies are abstract terms that cannot be easily observed or measured.



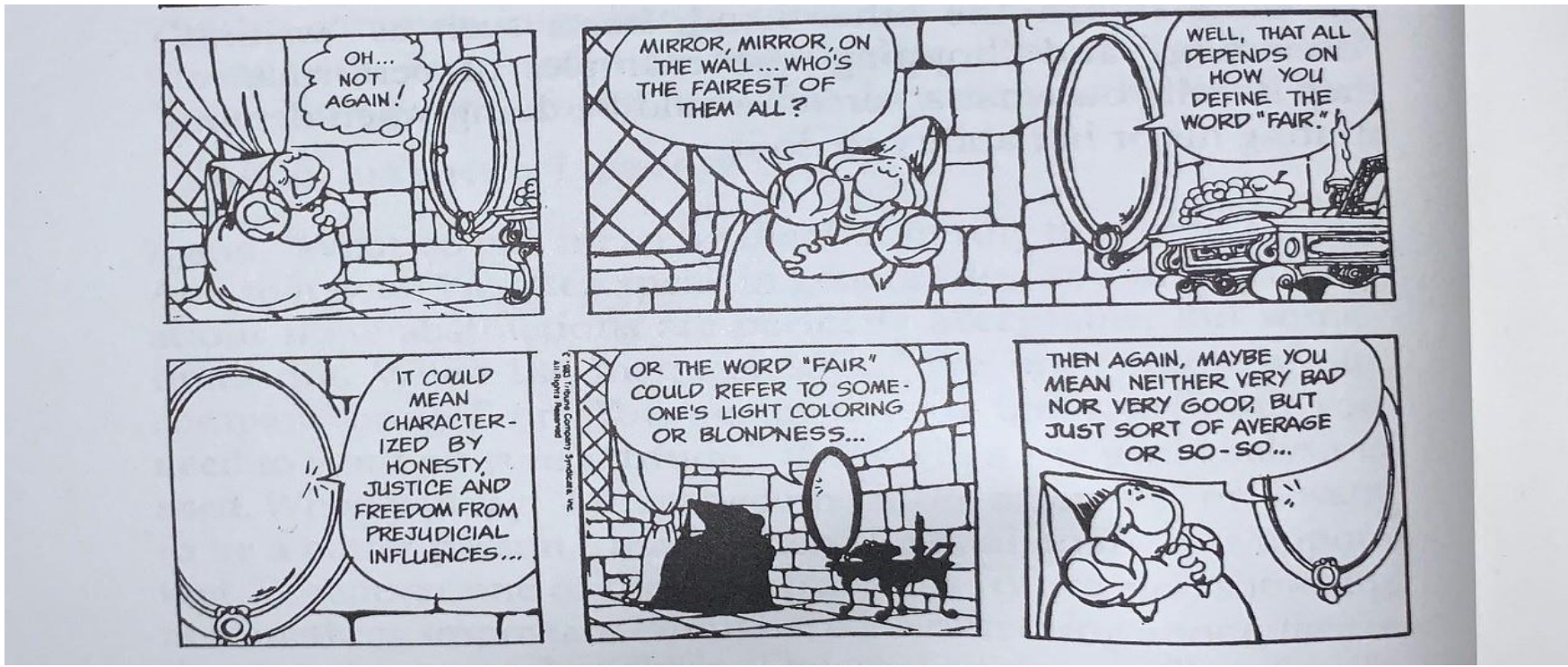
Question

Identify which are fuzzies:

- 1) interview an applicant
- 2) attain common goals with coworkers
- 3) be a good employee
- 4) 2 and 3

What are specifics?

A behavior or performance you can measure.



What are specifics?

Another way to think of this is to imagine saying, “Hey, watch me _____”.

If it's a specific, it will make sense. If it's a fuzzy, it will likely make you laugh.

Question

Identify which are specifics:

- 1) say favorable things about coworkers
- 2) work with enthusiasm
- 3) respond to emails
- 4) 1 & 3

What are outcomes?

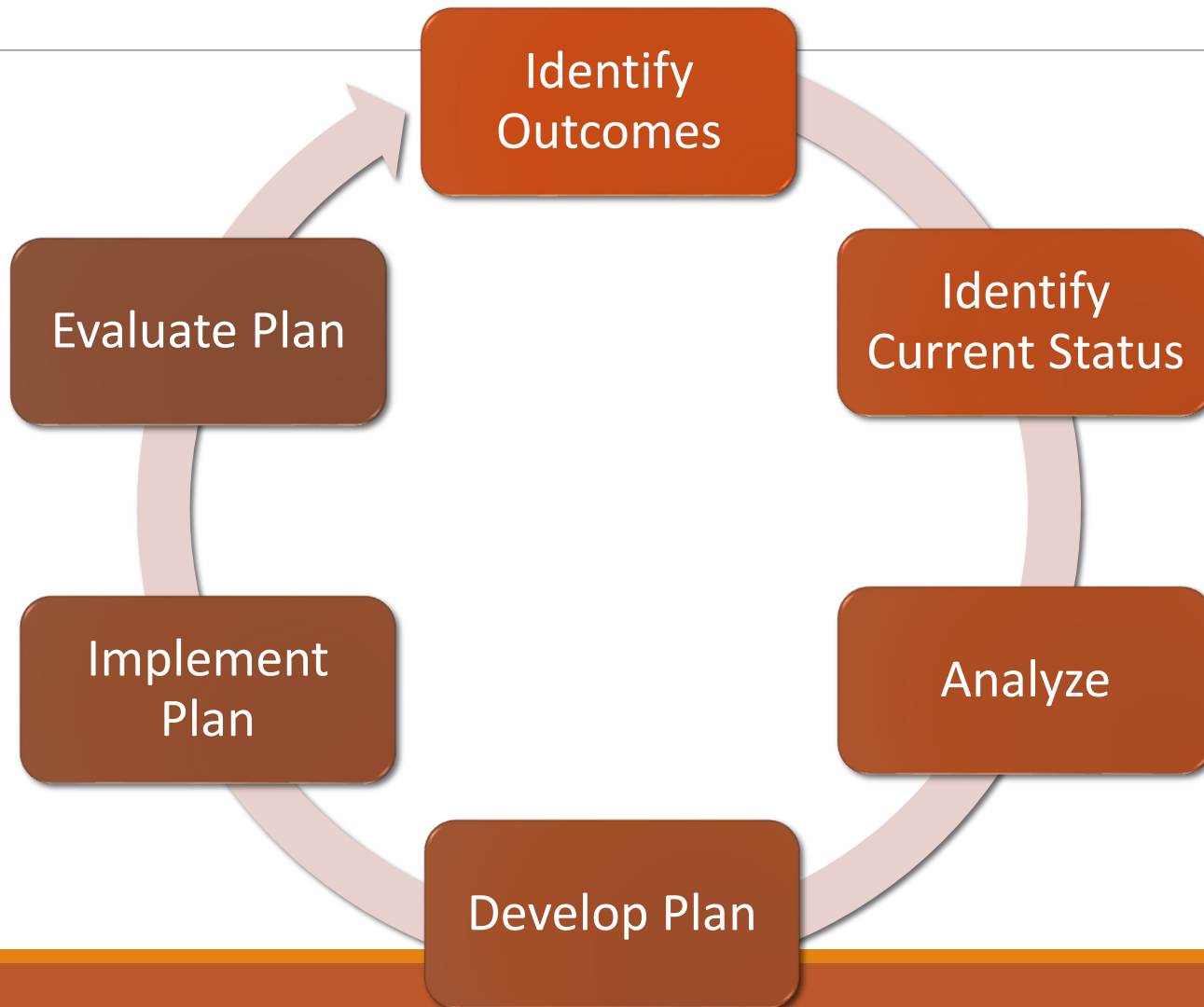
Skills, knowledge, changes, measures, permanent products, the things which evidence whether we have achieved our objectives and goals, artifacts or documents.



Write it out!

1. Identify your outcome
2. Write down your goal (either on paper or electronically)
3. List specific behaviors (objectives) that exemplify the goal
4. Sort the list and remove fuzzies
5. Move to decision making process

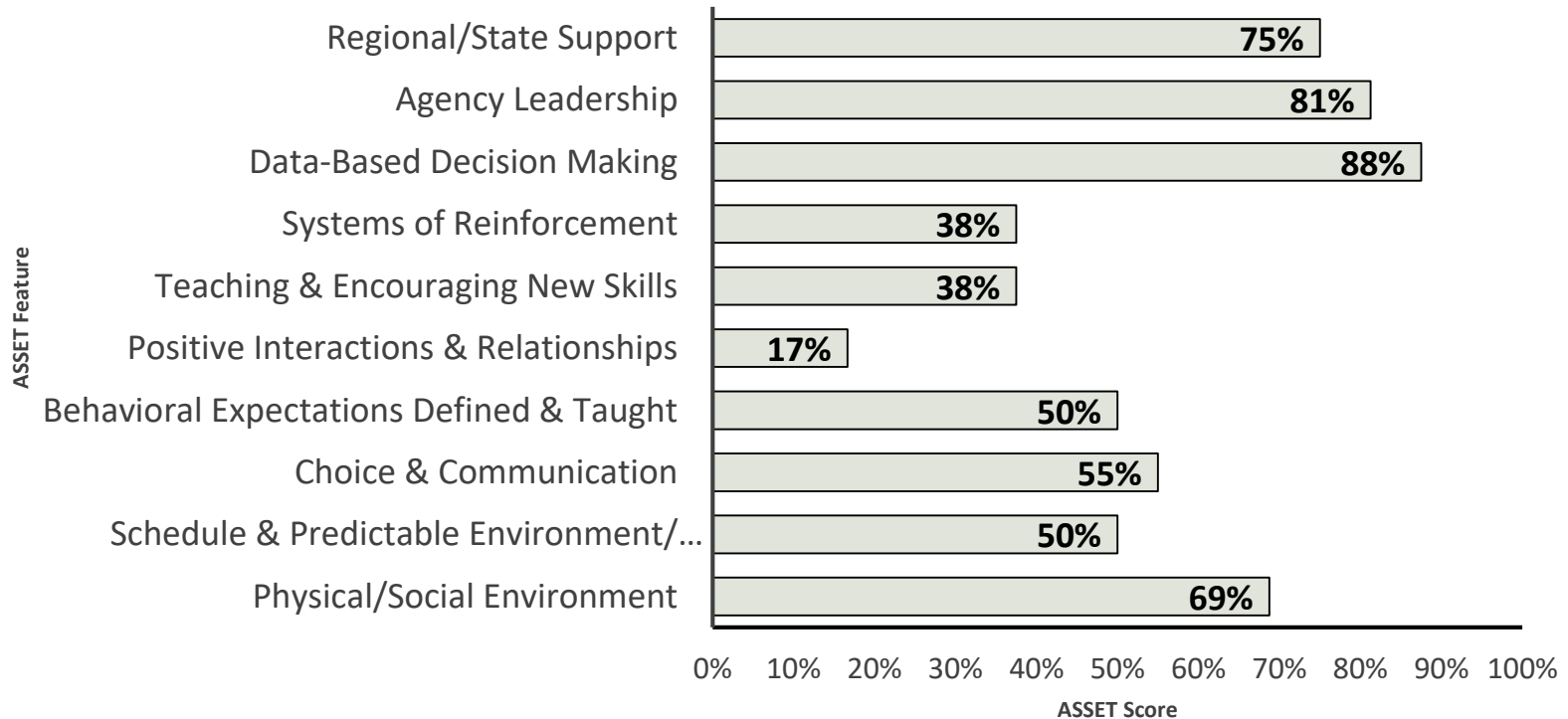
Decision Making Process



Action Planning

1. Identify Outcome
2. Review data for each component to assess your current reality

ASSET Findings Score



Analyze the problem

What is your
“reality gap”?

What is the gap
between what you
desire and what the
current reality is?



Develop a plan

A. Brainstorm and List:

1. Possible Goals
2. Possible Objectives (specifics, action steps, here is where you avoid fuzzies)
3. Timeline
4. Resources and Artifacts and Documents for the Evaluation/Outcomes Section

B. Prioritize Goals for Team Action Plan

- From Brainstorming - agree on all of the above as a team

C. Complete Action Plan Objectives

Action Plan Template

Agency Tiered Supports Action Plan				
Agency Team:		ATSC Coach:		Date of Plan and Revision Dates:
Overall Mission:				
Goals to meet this mission:				
IMPLEMENTATION				EVALUATION
What Needs to be Done?	Who will do it?	When will it be done?	Status/Date Completed	What Evidence Indicates this Progress
Goal 1:				
Specific objectives (action steps) for Goal 1:				
Goal 2:				
Specific objectives (action steps) for Goal 2:				

Example Action Plan

Agency Tiered Supports Action Plan				
Agency Team: Excellent A-Team		ATSC Coach: Excellent ATSC		Date of Plan and Revision Dates: 6/20/19; 7/1/19; 8/1/19
Overall Mission: Establish a system that improves quality of life by promoting a healthy, consistent environment for individuals being supported as well as those employed by the agency.				
Goals to meet this objective: <ol style="list-style-type: none"> 1. Establish an agency team 2. Establish clear expectations for individuals supported by the agency and employed staff 3. Teach values and expectations to individuals supported and to employed staff 4. Develop universal strategies for improving quality of life 5. Reduce staff turnover 				
IMPLEMENTATION				EVALUATION
What Needs to be Done?	Who will do it?	When will it be done?	Status/Date Completed	What Evidence Indicates this Progress
Goal 1: Establish an agency team				
Specific objectives (action steps) for Goal 1:				
1. Recruit staff for the agency team <ol style="list-style-type: none"> a. Send out an email blast announcing open team roles b. Post flyers on all bulletin boards 	Jerry Lee	7/1/19	Completed the following: 1a. 1b. and 1c on 7/1/19	Permanent product: emails, flyers

Example Action Plan, continued

<ul style="list-style-type: none"> c. Send a formal email to those candidates whom qualify to participate 			Completed 2a & 2b on 7/5/19	Agency meeting notes & Signed expectations
<ul style="list-style-type: none"> 2. Assign roles to agency team members <ul style="list-style-type: none"> a. Meet with team members to discuss role expectations and purpose b. Team members volunteer and choose their role; sign contract 	Jerry Lee & A-Team	7/7/19		
<ul style="list-style-type: none"> 3. Establish a clear mission 	Administration	7/1/19	Completed 7/3/19	Agency meeting notes & updated employee handbook

Goal 2: Establish clear expectations for individuals supported by the agency and employed staff

Specific objectives (action steps) for Goal 2:

<ul style="list-style-type: none"> 1. Complete a survey to get input on agency values <ul style="list-style-type: none"> a. Design survey b. Email survey to staff and print for individuals supported c. Collect surveys 	A-Team	7/14/19	Completed 7a-7c on 7/13/19	Permanent product: surveys; Excel file with graphed results; meeting notes
<ul style="list-style-type: none"> 2. After surveys are collected, choose 3-5 agency values 	A-Team	7/16/19	Completed on 7/15/19	Meeting notes
<ul style="list-style-type: none"> 3. Define established agency values of Hardworking, Trustworthy, Honest, Caring, Respectful 	A-Team	7/20/19	Incomplete	Meeting notes

Example Action Plan, continued

4. Create an expectation matrix incorporating above values for all homes	A-Team	7/25/19	Incomplete	Meeting notes & permanent product: Word file with matrix
5. Add agency values into the employee handbook and policy and procedures	A-Team & Executive Director	8/28/19	Incomplete	Employee handbook; policies & procedures

Month	# of Action Plan Objectives	# of Action Plan Objectives Completed	Completion Score
June 2019	0	0	0
July 2019	12	10	83%
August 2019	1	0	0
Total	13	10	77%

Changing the Action Plan

Team must be in agreement.

Update the action plan to reflect the changes.

- Put revision date

Keep a copy of old action plan for records.



Monitoring and Evaluating the Action Plan



- Just as important as identifying the goals and action steps.
- Ensures that the agency/team is following the established direction.
- How often?
 - Monthly!

Celebration

When a goal or step is completed, acknowledge that success.

Taking time to acknowledge a job well done provides closure, fulfillment and prevents the next planning cycle from being a grind.



Question

Where are you at in the Action Plan process?

1. Never heard of an action plan before this webinar
2. Want to start a plan
3. Have a plan but never use it
4. Actively using a plan

Let's Practice

Consider a performance you would like to see more of (i.e. increase positive/negative observations).

What is the current status of this right now (make an educated guess)?

Identify what needs to change.

How are you going to teach it/coach it/recognize it?

How are you going to know if what they are doing (teaching, coaching, recognizing) is effective?

Write an action plan goal and one or two objectives that would align with this goal.

Conclusion

- Use data
- Make it specific
- Review & revise often



Keep the Action Plan Off the Shelf!

“The question is whether the strategic plan [action plan] will be pursued or end up on a shelf collecting dust, beside other well-intentioned initiatives.”



- “Strategic Plan Attacks School Inadequacies”, Hartford Courant, July 13, 1994

Questions & Comments?



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