

Action Planning Tool

Step 1: Set Goals

Establish project goals that are reflective of each partner's mission. When developing goals remember that goals are the long-term result the project seeks to achieve.

Step 2: Develop Objectives

Develop concrete objectives which will incrementally move you toward your long-term goals. For each goal you may develop several objectives.

Goal #1:

- **Objective 1 (step):**
- **Objective 2 (step):**

Note: Objectives are specific (short-term), measurable steps/activities that can be taken to meet or reach the long term goal. Objectives need to include the following S.M.A.R.T.I.E. characteristics:

- **Specific** (strategic, simple, and significant)
- **Measurable** (meaningful, standards to be met)
- **Achievable** (attainable and also ambitious)
- **Realistic** (results oriented and aligned to the mission) and
- **Time-based** (clear deadlines for completion)
- **Inclusive** (includes the targeted audience in all aspects of design and execution)
- **Equitable** (addresses systemic injustice, inequity, or oppression)

Step 3: Action and Implementation Plan

Define your actionable activities.

- Each objective needs to include a strategy or key activities in order to achieve the goal. Ensure that strategies are described with clear action verbs.

- As a next step, also add roles, who will be responsible for leading the strategy, a time line and any resources needed.
 - Strategies/Activities
 - Implementers and Supporters (responsible/owner of activity)
 - Timeline
 - Resources needed

Action Plan for Implementation

Below is a table designed to assist each “responsible implementer/champion” in outlining the tasks required to complete a strategic objective, this could be done individually or in a team. Develop a brief description of what needs to be done to accomplish the objective, and then outline each of the tasks involved, a timeline of when they need to be completed, and next steps. “Responsible implementer/champion” reports on progress, completion, and end result.

Tips for Implementation:

- Recruit new partners to help implement the strategic plan, divide responsibilities.
- Allocate time to work on plan and set realistic timelines.
- Assess resources needed, including funds, human resources, and other operations/structures.
- Schedule regular follow-up assessment of progress and reporting to meet goals.
- Senior management and leadership need discipline to make the goals a priority.
- If applicable, make it a habit to provide regular updates on progress to the board of directors.
- Include incentives to achieve goals. Discuss accountability and possible consequences.
- Celebrate accomplishments!



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ACTION PLAN SAMPLE TEMPLATE

Goal I: Long range desired condition, aspiration.

Objective 1: Strategy to accomplish goal.

Actions steps or key activities to accomplish objective	What do we have?	What do we need?	Who will be responsible?	Timeline Next Steps



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Objective 2: Strategy to accomplish goal.

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Actions steps or key activities to accomplish objective	What do we have?	What do we need?	Who will be responsible?	Timeline Next Steps



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Objective 3: Strategy to accomplish goal.

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Actions steps or key activities to accomplish objective	What do we have?	What do we need?	Who will be responsible?	Timeline Next Steps



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Objective 4: Strategy to accomplish goal.

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Actions steps or key activities to accomplish objective	What do we have?	What do we need?	Who will be responsible?	Timeline Next Steps

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