**Action** Plan Guide

**What is an action plan?**

Action Plans are simple lists of all of the tasks that you need to finish to meet an objective (in this instance, to support a client). They differ from ‘To Do Lists’ in that they focus on the achievement of a single goal or set of related goals.

An *Integrated Action Plan* is where action plans for supporting a client from across different agencies or service providers and are consolidated into a single document. Consolidating action plans and agreeing on shared goals provides a ‘single source of truth’ on who is involved in supporting the client, provides a greater level of transparency, shared accountability and promotes coordination.

**Action plans are:**

* Clear and easy to use tools
* Tracking systems to streamline the work people have agreed to
* A single source of truth
* A way to build trust and support each other.

**Action plans can:**

* Breaks down team goals into tasks with timeframes and nominate responsibilities
* Help the team track progress and results
* Help the team to identify any new actions needed
* Record progress on actions, updates, new actions and act as minutes.

How to create an action plan

1. **Choose an appropriate goal and clearly define your objective.**

Make Sure your Goals Are SMART:

**S**pecific: Your goal is clearly defined/specific.

**M**easurable: You need to quantify your goal so you know you achieved it.

**A**ttainable: Goals should make the team stretch and challenge but still realistic.

**R**elevant: Goals should fit within your ultimate plans in life.

**T**ime-based: Realistic timeframes for achievement as a source of accountability.

1. **Decide what actions are required to reach the goals.**

Choose action steps that are concrete, measurable and attainable. Actions should be put into a schedule.

1. **Identify roles and responsibilities.**

Decide who is responsible for each action step and who will be supporting them.

1. **Set a clear timeframe for implementing action.**

Agree upon set dates by which actions will occur and be completed, include this in the plan schedule.

1. **Set a clear timeframe for review.**

Setting up a future time in which the team can follow up on actions and revise goals/actions as appropriate.

1. **Involve the client and/or their carer/guardian in the goal setting stage of the action planning process, where appropriate.**

This step ensures the implementation of the action plan is still person-centred practice.

What are the criteria for a good action plan?

The action plan for your initiative should meet several criteria. Is the action plan:

*Complete*

Does it list all the action steps or changes to be sought in all relevant parts of the community (e.g., schools, business, government, faith community)?

*Clear*

Is it apparent who will do what by when?

*Current*

 Does the action plan reflect the current work? Does it anticipate newly emerging opportunities and barriers?

The inability to achieve goals can be poor goal setting, but it can equally be due to a failure to take consistent action.

Tips to achieve goals

Tips include:

* **Collective agreement**from services that the action plan will be used and regularly reviewed.
  + A *Communication Protocol* is recommended as a formal means of showing commitment. The Protocol sets out a collective agreement by services to continued involvement in action planning and provides the contact information necessary to maintain collaboration.
* **Set up frequent teleconferences** to track progress of action plan
* Goal task reminders
* Team feedback on progress
* **Create accountability.** 
  + Most people are willing to do things for others than they are for themselves.
  + Setting up accountability puts pressure on you to follow through.
* **Track actions and results.**
  + A list with checked-off tasks shows all you’ve done so you can feel accomplished.
  + Evaluating the results of those tasks helps you know what’s working and what is not.
* **Reward yourself.**
  + Success is the best reward.
  + Identifying your long-term goals and setting up a series of short-term rewards will keep you and the team moving towards and accountable to those goals