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| Tool icon | Action Plan Template 5.3.1T |

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| **Purpose** | To document the series of steps needed to ensure that the strategies identified by the District Data Team to address the identified problem areas are implemented as intended. |  | **Related Documents**  5–Action Module  5.3.2T: Action Plan Checklist |
| **Description** | Develop an action plan (if needed) to implement new strategies or to implement existing strategies more effectively. |  |
| **Time** | 30–45 minutes for each strategy requiring an action plan. |  |

## Note: As discussed in the text of *Module 5: Action*, it is not always necessary to develop an action plan.

## In considering whether or not to craft an action plan, a district might ask:

* Do action plans already exist for the strategies we have identified?
* Would an action plan significantly enhance the district’s ability to delegate
* Steps and/or monitor their completion?

Generally speaking, action plans are only required for new strategies or strategies

That requires changes to function as intended.

**Components of an Action Plan**

In relationship to the logic model, an action plan has the following components:

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| ***INPUTS*** | | | ***OUTPUTS*** | ***OUTCOMES*** | ***IMPACT*** |
| **Problem Statement(s)** | **Strategies** | **Resources** | **Measures of Implementation** | **Measures of Change** | **Goals** |
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| **Strategy:** | | | | |
| **Action Steps** | **Resources** | **Measures of Implementation** | **Owner** | **Deadline** |
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Essentially, action plans drill down to provide more detail linking the strategies and resources to the measures of implementation and ultimate goals. If the Team has already developed a logic model to articulate the district’s theory of action in supporting improvement, then the strategies, resources, and many of the implementation measures will have already been identified.If it does not have a logic model, then the steps below can help the Team create a plan.

## Building an Action Plan

**Begin by asking:**

* + If the district intends to leverage an *existing strategy* to address the problems it identified, does the strategy need to be refined, adjusted, or improved prior to its implementation?
  + If the district identified a *new strategy* to address the problems it identified, does the new strategy require multiple steps to be implemented?

**If the response to either of the above questions is “NO”, then the strategy does not require an action plan.** The District Data Team should focus its time and energy on developing action plans for the other strategies it identified, or proceed to *Module 6: Results* to develop an evaluation plan.

**If the response to either of the above questions is “YES**”, use the template below to craft a plan that will guide implementation of the activities:

* Begin by articulating the overarching strategy that the action plan will support.
* Respond to the guiding questions in each column, proceeding from left to right.For example, begin in the first column by naming the specific action steps.For each action step, indicate the necessary and available resources, the measures of implementation (which can be drawn from the logic model, if it exists), the owner, and the deadline.
* Each action step should have corresponding information in each of the other columns.For every action step, there should be resources, at least one measure of implementation, an owner, and a deadline for completion.

**Note:**

* + If the Team has crafted a logic model (*5.1.1T* and *5.1.2T*), it should have that available for reference, as the strategies, resources, and many of the implementation measures will have already been identified.
  + *5.3.2T:Action Plan Checklist*provides additional guidance on refining the completed plan.

**Directions for Completing an Action Plan**

1. Indicate the **strategy**—the specific means, method, or approach to solving the identified problem(s).If the Team has completed a logic model, these are outlined in the second column. If the Team has not completed a logic model, it will need to determine the best approach to addressing the identified problem. Since the strategy is the driver of the action plan, it is essential that the Team think carefully about this component.
2. List the **action steps** that describe the major steps that must be taken to implement the strategy. They should be listed in order of completion, note which need to be completed before others, and which need to be sufficiently described so others can understand them and carry them out.

In articulating action steps, a district should stay focused on the big picture, naming only the most significant, far-reaching steps that need to be monitored as evidence of progress toward the goal. However, the owner of a specific action step may wish to add detail to the action plan to guide his or her particular work, e.g., if he or she has to manage a team of people to get the work done, or has many details to track.

1. Indicate the **resources** needed to implement one or more action steps, if needed. In some cases, key resources may be lacking or not yet allocated to the project, in which case one activity would be to secure those resources. For example, ESE offers a wide range of technical assistance, but accessing that assistance for a particular project would require someone from the district approaching the appropriate office to see what is available. As with the strategy, if the Team has completed a logic model, it will have already identified this information.
2. Indicate the **measures of implementation** that tell when the action step or strategy is fully realized or carried out. For example, the measure of implementation of a professional development strategy might be that a certain percentage of teachers receive training over a specified period. Again, if the Team has completed a logic model, it will have already determined what will serve as evidence that key action steps have been implemented, and can use those measures as a starting point.However, since the action plan by definition provides more detail, the Team may want to add additional measures of implementation that capture a finer grain of detail.
3. Indicate the **owner**—the individual most closely responsible and accountable for a given action step. It is essential that this be a specific person and that they have the resources, capacity, authority, and support required for completing the step.
4. Give the **deadline** by when the action step will be completed. Completion of the last step signifies the date by which the strategy is expected to be fully operational and by which measures will be available for analysis.

**District/School Name: Today’s Date:**

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| **Strategy:** | | | | |
| **Action Steps** | **Resources** | **Measures of Implementation (Outputs)** | **Owner** | **Deadline** |
| *What steps must be taken to implement our strategy?* | *What specific supports are needed to implement this action step?* | *How will readers of the plan know the action step or strategy is fully realized or carried out?* | *Who is most closely responsible and accountable for taking each action step?* | *By when will the step be completed?* |
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