



Bonner Curriculum

Action Planning: Developing a Plan

Overview:

Student organizers and leaders of community service projects and civic engagement often face issues that require well-developed plans and problem-solving approaches. This workshop guides participants through a series of activities including brainstorming, idea formation, and written exercises to guide development of individual action plans. Through it, participants will learn a concrete strategy for action planning that allows them to focus their purpose and goals, as well as produce written plans and documentation that can be used to persuade others, garner resources, and move forward.

Category:

Project planning; project management; goal setting; advocacy; general leadership

Level:

Moderate to Advanced; assumes participants will be involved in leading action-planning and projects

Recommended

Bonner Sequence:

This workshop could be used at any time during the Bonner experience, but may be most suitable for during sophomore or junior years, especially as part of preparing students for project coordinator roles. It can be used in conjunction with the project planning baseline for sophomore year or the project coordination baseline for junior year. It could also be helpful for a student planning a capstone project (senior year).

expectation	explore	experience	example	expertise

VALUES: ALL - community engagement, community building, social justice

Type:

Structured activity suitable for workshop format

Goals of this Guide:

- Participants will learn how to identify and assess issues that they want to take action on in their communities.
- Participants will learn how to develop action plans to use in their own communities, organizations, and on their campuses.
- Participants will apply steps toward project of their own choosing, including the opportunity to engage in dialogue with others and writing.

Materials:

- Copies of *A Guide to Creating Action Plans* for all participants (see attachment).
- Flip chart paper, tape, and markers for participants.

How to Prepare:

To prepare for this workshop, prepare handouts and have flip chart paper, markers, and tape ready to distribute. As the facilitator, you will be guiding participants through a series of exercises that will help them develop an action plan. You may also find it useful to have thought through your own or relevant examples to illustrate ideas or material.

Brief Outline:

This 2-hour workshop has the following parts:

1) What are action plans?	suggested time 5 minutes
2) Identifying the issue or challenge	suggested time 15 minutes
3) Evaluating the challenge	suggested time 20 minutes
4) Developing a mission Statement	suggested time 10 minutes
5) Creating goals	suggested time 15 minutes
6) Constructing action Steps	suggested time 20 minutes
7) Action plan presentation	suggested time 25-35 minutes
8) Next steps	suggested time 5-10 minutes

If you are reviewing this for content and not to do as a workshop, then you may want to work through some of the exercises, briefly, yourself and then use the attached Steps in your own work. You can modify activities or wording in the steps as necessary.

Part 1) What Are Actions Plans

Suggested time: 5 minutes

To begin the workshop, you may engage the participants in an interactive exchange, responding to the question, “What Are Action Plans?” Ask people to note examples of action plans they have used, elements of those plans, and functions of them.

Then, explain that this session defines action plans as articulated (written) plans that individuals, groups, and organizations develop to guide and focus their efforts in certain initiatives. Action plans are very useful for project and service initiatives in order to reach desired goals and impact.

If not already passed out, pass out the (attachment) *A Guide to Creating Action Plans* and prepare to begin the next part.

Part 2) Identifying the Issue

Suggested time: 15 minutes

The remainder of the workshop is structured around leading participants through the steps in a dialectical process of explanation, time for application, and time for discussion. In each part, steps may include:

- Start by explaining the steps and interweave time for participants to complete the steps on their guides.
- Share your own relevant example as illustration.
- You can have participants work in pairs or small groups and share with each other.
- Have individual or groups of participants share as well.

Here, briefly explain *step 1: Identify the Issue/Challenge* and give participants at least 10 minutes to brainstorm problems by writing in their own *Guides*.

Part 3) Evaluating the Issue

Suggested time: 20 minutes

Again, explain each part of *step 2: Evaluate the Issue/Challenge* and give participants 15 minutes to complete the exercise.

Again, pepper the explanation and individual work with time for sharing, questions, and/or discussion.

Part 4) Developing a Mission Statement

Suggested time: 10 minutes

Explain *step 3: Develop a Mission Statement* and give participants at least 5 minutes to complete the exercise.

You may want to have a few prepared mission statements to share here, in order to help participants to hone their mission statements into concise, precise, and compelling language.

Part 5) Creating Goals

Suggested time: 15 minutes

Explain *step 4: Create Goals* and give participants 10 minutes to complete the exercise.

For additional support on goal setting, consult the Setting Objectives workshop. Have a few prepared goals to illustrate best practices for goals, which include being SMART:

- S- specific
- T- measurable
- U- achievable
- V- realistic
- T- timebound

Part 6) Constructing Action Steps

Suggested time: 20 minutes

Explain *step 5: Constructing Action Steps* and give participants 15 minutes to complete the exercise.

Try to vary sharing if you can. For example, you can use rotations of pairings or have individuals and/or groups give and receive feedback.

Part 7) Action Plan Presentation

Suggested time: 25-35 minutes

At this point, give participants 25-35 minutes (or whatever allotted) to revise their complete sets of ideas and plans. Have participants capture, in writing, the most relevant information from the suggested Action Plan format on flip chart paper, and post them around the room. Based upon time, allow as many participants as possible to present their plans to the group.

Part 8) Next Steps

Suggested time: 5-10 minutes

Wrap with a review of next steps (e.g., will the participants check in with you or each other again, timeline, etc.)

Also, you may want to use an evaluation and comments.

A Guide to Creating Action Plans

1. Identify the issue, challenge, or problem to be addressed.

The purpose of an action plan is to organize and develop solutions to address a specific issue, challenge or problem. The challenge could range from the lack of living wages for your college's support staff to creating a strategic plan for the growth of your organization.

Jot down a few challenges or issues you are aware of either on or off campus that you feel you and your alliance, group, or organization could address:

2. Evaluate the issue

Now, examine the list of challenges again and choose one that you feel most committed and confident about addressing through a plan of action. Once you've done this, the next step is to evaluate the challenge more objectively and thoroughly. Evaluate the challenge in relation to five primary areas: **Background, Need, Constraints, Resources Available, and Resources Needed.**

- **Background** refers to the history of the issue/challenge, including the cause and other individuals and programs that have tried to address it. If you are not familiar with the issue, this may take a little research on your part. *However, based upon what you understand now, what is the history of this issue in the given context?*
- **Need** has to do more with solutions to the issue or challenge. Essentially ask yourself: "What needs to happen to effectively address this issue?"
Jot down ideas below:

- **Constraints** are those factors that are keeping you from addressing the challenge. They might include lack of time, money, education about the issue, volunteers, etc.
Brainstorm a list of possible restrictions that you are aware of:
- **Resources Available** is those resources that are easily and readily available and accessible right now to address the issue.
So, what are your available resources?
- **Resources Needed** is those resources that are *not* easily and readily available and accessible right now to address the challenge.
So, what resources do you need?

3. Develop a Mission Statement

Now that you have developed a more thorough conceptualization of the issue/challenge, you can now work to refine the purpose of the action plan and the projects it will initiate. The Mission (or Vision) Statement aims to be a broad and concise description of your purpose for creating an action plan to address the problem. It does not establish specific tasks that the organization will accomplish, but rather what the problem is and generally how it will be addressed.

An example Mission Statement from an action plan developed by student peer educators addressing safer sex education on a college campus state:

“Recognizing that the lack of safer sex education on campus may be contributing to rising rates of sexually transmitted diseases among students, the Peer Educators are committed to spreading awareness of safer techniques through special programs, workshops, and speakers.”

As you see, the Mission addresses the context and states a related purpose. You don’t have to do it in that way, but it may be helpful.

Create a possible Mission Statement for your action plan.

4. Create Goals

Goals function as a kind of thesis statement for the action plan. They explain exactly what the intended tasks will be in order to fulfill the mission. Keep in mind that effective goals are action oriented, clear (who, what, where, by when), and are related directly to the problem.

You may want to tailor your goals to meet the criteria of being SMART:

S	specific
M	measurable
A	achievable
R	realistic
T	time-bound

Example goals from the safer sex education action plan might be:

By the end of the year, the Peer Educators will:

- *Establish a safer sex campus committee whose job will be to coordinate future safer sex education programs.*
- *Host a safer sex health fair where local community agencies will be available for counseling, distributing information, and conducting STD tests.*
- *Facilitate at least one safer sex workshop in each dormitory and health class on campus.*

Now brainstorm 1-3 goals for your action plan:

1)

2)

3)

5. Construct Action Steps

Now you've arrived to the most crucial part of the action plan: the action steps. Essentially, the action steps are a realistic list of solutions and activities that will address the challenge, thus fulfilling the goals and working to achieve the mission.

But to develop the action steps, you must first brainstorm a list of possible solutions using your background evaluation earlier developed. Especially keep in mind your **Need, Constraints, Resources Available, and Resources Needed** assessment.

For example, if the **Need** part of the evaluation for the lack of safer sex education proposed by the student peer educators required initial approval from the Counseling Center, the Health Center, as well as Dean of Student Affairs, then an action derived from this would be:

“Present initial ideas for increasing safer education on campus to the Directors of the Counseling Center and the Health Center as well as to the Dean of Student Affairs.”

Once you've developed this primary action step, determine (using your evaluation) if there are any constraints and if there are resources to conduct a presentation to these offices. (Make sure to do this for all of your primary action steps.)

Next decide 3 more things:

- Who will be responsible for coordinating or carrying out the action?
- A time by which that action might occur.
- The intended outcome of the action.

Example action step chart for the student peer educator's safer sex education plan:

What	By Who?	By When?	Expected Outcome
Meet with the Directors of the Counseling Center and Health Center as well as the Dean of Student Affairs.	The whole group.	By the second week of the semester	To have all three offices approve our ideas to increase safer sex education on campus.
Develop at least 3 new safer sex workshops and schedule to present them in all of the dormitories on campus.	The whole group.	By the fourth week of the semester	To have at least 30- 40% of residents in each dorm attend the workshop.
Begin to plan a safer sex fair to be hosted next semester.	The whole group.	By the ninth week of the semester	To get community agencies interested in participating in the fair.

Now develop 2-3 action steps of your own:

What	By Who?	By When?	Expected Outcome

6) Format your action plan

Now arrange the plan into a formal document that you can easily distribute to those in your organization or anyone just interested in knowing your plans.

Suggested action plan format:

Title

1) Mission Statement

2) Goals

3) Issue and Background

4) Action Steps