

**Tool: Action Plan**

**WHAT IT IS** A tool for identifying and tracking events that should occur during any stage of change planning or implementation.

**WHEN TO USE IT** During the visioning, designing, planning, and implementing phases to help establish and keep track of planned change steps.

- HOW TO USE IT**
1. Record the steps that need to be taken, who is responsible, including those designated as primarily responsible, start and completion dates, any clarifying notes, and the status.
  2. Update the status of the steps on a regular basis.
  3. Use the information on the Action Plan to provide others with progress updates.

A sample format for an Action Plan follows:

PROJECT:  
PERSON RESPONSIBLE:  
START DATE:  
COMPLETION DATE:

STEPS TO BE TAKEN	PERSON(S) RESPONSIBLE * = PRIMARY	START DATE	COMPLETION DATE	NOTES	STATUS