

Instructions for filling out the Action Plan Worksheet

Overview

The Strategic Planning/Budget Committee (SPBC) has developed the Action Plan as a core part of our college's new strategic plan format. The format has a hierarchical structure, as seen in the image below.



In the Action Plan, we can begin to relate specific, measurable intentions to the broader institution Core Theme Objectives. We can also begin to relate budgeting decisions to our plans, so that over time our plans will drive our budget rather than the reverse.

How to use the Action Plan Worksheet

Part 1: Preliminary steps

1. Save the file "Action Plan Template" to your hard drive, giving it a descriptive name beginning with "Action Plan" (e.g. "Action Plan Biology Department")
2. Open the renamed file using MS Excel. The file contains two worksheets, represented by tabs at the bottom of the screen. These tabs are named "Cover Page" and "Action Plan & Progress Report".
3. Select the tab labeled "Cover Page"

Part 2: The Cover Page

1. The SPBC is in the process of identifying important initiatives. As of November 2011, the only identified initiative is "Increase College Enrollment". For now, if your goals do not fit under the identified enrollment initiative, please delete the pre-loaded text and leave the Initiative blank empty.
2. Give your Goal a number. If a Goal number has not been assigned to you, begin with number 1. If you submit multiple Action Plans, number your Goals consecutively.
3. Give a brief (5-15 word) description of your Goal. Your Goal should begin with an action verb (e.g. increase, improve, produce, etc.). As you can see from the hierarchy above and from the sample Action Plan, Goals are high-level, statements about our intentions. Goals will frequently involve multiple areas of the campus. Please craft your Goal in line with these expectations. If you need assistance, contact the SPBC member who sent you the Action Plan Template.
4. Use the check box to indicate whether you are submitting an Action Plan (i.e. it is the first time you have submitted a plan for these specific Strategic Objectives) or a Progress Report (i.e. you are reporting on your achievements toward Strategic Objectives already submitted to the SPBC).
5. Use the check boxes to indicate the Core Theme Objectives to which your Goal is relevant.

Part 3: The Action Plan & Progress Report

1. Select the tab labeled "Action Plan & Progress Report"
2. In the spaces provided, list your Strategic Objectives and the specific Actions which will help you to achieve your objectives. Refer to the sample for guidance.
3. Strategic Objectives should be numbered using the following format: X.Y, where X is the Goal number (from the cover page) and Y is the Strategic Objective number. Strategic Objectives should be numbered consecutively beginning with number 1.
4. Actions should also be numbered. Use the following format: X.Y.Z, where X is the Goal number, Y is the Strategic Objective number, and Z is the Action number.
5. Fill in the remaining columns for each Action. Refer to the Strategic Plan Glossary and the sample Action Plan for guidance. For additional assistance, contact the SPBC member who provided you with the Action Plan.