Action Plans for Targets

Action Plans are detailed plans created by the unit to meet an Achievement Target that was only partially met or not met OR to make improvements to successful Measures that were met but may need strengthening. The Action Plan includes a projected completion date, implementation description, responsible person(s)/group, resources required, and budget amount requested (if applicable). Action Plans created in previous cycles are updated with implementation notes to describe steps that have been taken toward completing plans.

Instructions for Creating an Action Plan for Targets

1. Hover over “Assessment.”
2. Select Measures and Findings.
3. Select the triangle toggle button on the left side of a Measure.
4. Scroll down to “Target.”
5. Under “Findings” select “Add New Action Plan” and fill in the required information:
   - Relationships – the Measure and Outcome/Objective directly associated with the Achievement Target will be checked. Relationships between the Action Plan and other Measures and Outcomes/Objectives may also be checked.
   - Implementation Status – select planned if the action is still in the planning phase, in progress if the plan has been started but not completed, finished if the plan has been completed, on-hold if the plan has begun but is not progressing, and terminated if the Measure and targets are no longer viable (for example, if the Measure was to begin a new program and the target was to have 50% of the paperwork for the program complete but the new program is no longer going to be started, the Action Plan would be terminated.)
   - Condensed Description – a title that will appear in bold print on the summary screen.
   - Projected Completion Date – provide a completion date for the Action Plan, if known.
   - Implementation Description – list what steps need to be accomplished for the plan.
   - Priority – entities set to high, medium, or low.
   - Responsible Person/Group – list who is responsible for completing or providing oversight for the plan.
   - Additional Resources Needed – list all resources that will be needed for the plan such as additional space, equipment, salary, etc. Make sure to be specific about how much each resource is estimated to cost.
   - Requested Budget Status – choose “No Request” if no budget items are related. If budget is related, choose “One Time” or “Recurring.”
   - Budget Amount Requested – if different budget items are listed in the additional resources needed box, please make sure to total those amounts for the budget amount requested box. Do not put dollar signs, commas, or decimal points in the box. Use numbers only.
   - Include on Action Plan Tracking page – default is checked
   - Include in Reports – default is checked
   - Established In Cycle – should read the current cycle.
   - Active Through Cycle – should be the cycle when the plan is expected to be completed. If the plan is finished or terminated, the “Active Through” cycle should be the current cycle. Do not leave Action Plans in the “Keep Active” cycle.
6. Change the entry status to “Final” and save.