Once you have decided on your goals and the strategic initiatives that must be completed to reach these goals, you should create an Action Plan. This Action Plan is essentially the high-level map for your team to move from its current state to its desired vision over the next 3-5 years. It provides detail on the strategic initiatives that must be accomplished to achieve your goals and serves as a tracking mechanism to measure your progress.

1. **Review Results of Goals & Strategic Initiatives Activities:** The best starting point for creating a comprehensive action plan is a review of the work that your planning teams have completed during the earlier stages of their strategic planning activities. For teams who have been following the strategic planning framework developed for this toolkit, this involves a review of the results of the previous Setting Goals and Developing Strategic Initiatives section.

   **Questions to Consider:**
   - Have we properly identified the unit’s overarching goals and related initiatives and action items?
   - Are our goals aligned with the unit’s mission and vision?
   - Have we selected the right mix of strategic initiatives and other action items that will help the unit meet its goals? Are we satisfied with the selection criteria that we used and the results?
   - Do we need to make any additional or deletions to address gaps, redundancies or non-mission aligned items?

2. **Meet to Discuss Priorities and Recommendations:** Before converting the results of step #1 into an action plan, teams should review their findings with their core stakeholders for feedback and input. You should meet with the appropriate directors, dean, vice president, Provost or Executive Vice President, and others to discuss and set the high-level direction for action planning and implementation. Hopefully, your planning team has been communicating with these core stakeholders throughout the planning process. If so, this may be handled during one of the regular milestone meetings or check-in points for your team.

   **Questions to Consider:**
   - Are there items that are already committed or part of a bigger plan that should be included in the team’s action plan?
   - Are there items that should be removed from the plan because they are being addressed elsewhere? How should the team address and coordinate those efforts in this plan?
   - How do our core stakeholders define the key priorities for the unit? Is there broad agreement or will we have to resolve some conflicts or inconsistencies?
   - Are the core stakeholders aware of any time constraints or commitments that may impact the staging or sequencing of your team’s plan?

3. **Draft an Action Plan:** Once there is agreement about the high-level direction for the unit, it is time for the team to write the Action Plan. This plan includes goals, specific actions that must be taken to achieve the goals, metrics/performance measures to ascertain whether and to what extent the goals have been met, and specific assignments and estimated timelines for implementation. A template is included in the toolkit that can be very useful to organize all the elements of the plan and track progress in achieving your goals over time. For more guidance
on this step, please refer to the *Creating Action Plans - Tips and Techniques* document located in this section of the toolkit.

**Questions to Consider:**
- What is the preferred organizing framework for creating the Action Plan: will there be a single author or a small core group creating the draft of the plan; should this task be handled by the entire committee; or does the ideal solution lie somewhere along this spectrum?
- Who are the subject matter experts for each of the goals and related initiatives? Who is the best person or persons to speak to issues of staging, expected durations, timelines, responsible parties, metrics, resources and others?

4. **Revisit Stakeholder Analysis:** The drafting of an action plan is a good opportunity to review the needs of the unit’s stakeholders and determine how well the action plan addresses these needs. Teams that completed the exercises in the *Stakeholder Analysis* section of this toolkit should revisit that section now to match up relevant stakeholder needs to the goals and initiatives developed throughout the planning process. Doing this at this time may also identify possible gaps that may not have surfaced until now. Lastly, conducting an analysis of how your plan addresses the needs of your key stakeholders will provide you with the salient points and benefits you may wish to highlight when communicating the plan, which will aid you in gaining support and buy-in for your plan.

**Questions to Consider:**
- How have we addressed the needs of our key stakeholders?
- Are there things that we need to add or change when compared to our stakeholder needs?
- What are the specific benefits of this plan for each of our key stakeholders (benefits may be different for different stakeholders)?
- Do we anticipate resistance to the plan based on what we know about our stakeholder needs?
- Which stakeholders can we count on for helping us with gaining buy-in and support for our plan? How should we enlist them in this effort?

5. **Discuss Plan with Planning Teams:** Often, the planning work is conducted by a large planning team or sub-committees but the actual drafting of the action plan is managed by a smaller core group. Depending upon how your planning work was carried out and how you have managed the drafting of the action plan, you should consider reviewing the draft plan with your team for input and feedback. This will ensure the information is accurate and reflects the work of the planning teams. With larger efforts, this may be the first time that all the subcommittees are getting a view of the entire plan so this may serve as a good “final check” for new ideas, suggestions and changes.

**Questions to Consider:**
- Has the work of your team or sub-committee been accurately represented in this plan?
- Do you have a good understanding of how all the components complement each other? Do you have suggestions for how this may be further enhanced?
- Have any new ideas or suggestions surfaced now that you see all the components of the plan together?
- Do you see any items that concern you and/or may be lead to resistance once the plan is communicated?
- Do you have any suggestion for who should be included in our communication plan?
6. **Approve the Action Plan:** The final step of the strategic planning process involves the approval of the strategic plan and its associated action plan. Depending upon the nature of the unit (department, division, school, functional group, etc.) and the specific impetus for the plan (directed, self-directed), planning teams will have different paths for this step of the process. As mentioned in Step 2 above, it is helpful for planning teams to keep communication channels open with their core stakeholders throughout the planning process. If this is the case for your team, this approval meeting may be handled during one of the regular milestone meetings or check-in points. Typically, the unit head, or planning team leader, submits the Strategic Plan and accompanying Action Plan to the Vice President or Provost, who reviews it, ask questions as needed, and requests changes if appropriate.

**Questions to Consider:**
- Who are the core stakeholders that are responsible for approving the unit’s plan?
- Are there other stakeholders that should be included?
- Who should present the plan for approval? Should it be the unit head, planning team leader or both? Should members of the planning team be included?

7. **Communicate Action Plan:** Once the strategic plan and associated action plan have been approved, they should be shared with the planning team, staff, key stakeholders and members of the broader community. It is important to inform these individuals and groups about the mission, vision, goals, objectives and benefits that have emerged from the planning process. Many of these individuals and groups may have participated or provided input throughout the planning process so there may be much interest and anticipation about the results of this effort. People will need to understand how the vision, plan and associated changes might affect them and have an opportunity to offer feedback. Communicating the elements of the plan will also help the unit generate enthusiasm while setting realistic expectations about the scope and timing of the changes.

Teams should review the results of their Stakeholder Analysis to identify target audiences, match stakeholder needs to specific benefits of the plans and determine key points and messages. This exercise will guide teams during the development of the unit’s communication plan and will help ensure buy-in and support for the plan.

**Questions to Consider:**
- What is the best method to communicate the details of the plan with each stakeholder group? How should we tailor the communication plan to focus on their needs and interests?
- What are the elements of the plan that should be included in mass communications (print, web, media, etc.)?
- Who will be responsible for communicating each element of the communication plan?
- What mechanisms are in place to gather feedback/input to ensure effective two-way communications? What will be done with this feedback?