



Action Planning Tool Kit

CARS Training Process

A) Why bother with an action plan?

By the time you reach this module in the CARS process, you will have a collective community vision and a goal in mind for your community work. The next step is to develop an action plan. An action plan is just what it says – it is a plan of how you will do your work or take action over a specific period of time. Action plans take the passion of your vision or goal and then tell you, and others, how you will put that passion into action. Action plans generally outline your:

- overall goal
- objectives
- activities
- outcomes
- indicators of success
- resource requirements

The clarity provided by an action plan helps you move forward and mobilize others in the process. There is something about knowing where you are going or what you need to do that just makes it easier to shift into action. Most importantly, an action plan will tell you how you will know when you have accomplished your task. Recognizing accomplishments and celebrating achievements is critical to sustaining collective community action and effort.

Some action plans cover long periods of time, like a year or more. For those groups just getting started however, it might be more manageable to consider a shorter period of time, such as 3-6 months. As mentioned, community mobilization is usually sustained through previous successes, so it is often wiser to take smaller steps that have greater potential for success, no matter how small. It is the small successes that will build the confidence and foundation for more significant accomplishments in the future.

We are going to go through the stages of the development of an action plan. It may seem like a lot of work, but in the end you will be able to move forward more quickly and are more likely to succeed if an action plan is in place. Think of action plans as short term pain for long term gain!

B) To effect change in our communities we have to answer seven questions

1. What is our goal?
2. What small steps will we take to get to our goal?
(objectives)
3. Why are we taking these small steps?
(long term outcomes)
4. What activities will help us complete these small steps? (activities)

5. What changes in skills, knowledge, attitudes or behavior can we expect from our activities?
(short term outcomes)
6. How will we know that we did what we said we would do? (success indicators)
7. How will we share our progress and what we have learned with others? (reporting requirements)

Now, let's look at each of these questions one at a time.

1. What is our goal?

Goals are statements of what we want to accomplish and how we intend to accomplish it. Goals describe points of arrival that outline what change we want to see in our communities. To a great extent, they are like a wish list of how things should be. Goals are broad statements of intent, are non specific and usually not measurable. If dealt with on their own, goals can seem unachievable. We develop goals however, to point our steps and actions in a certain direction. Taken a step at a time, it is possible to reach your goals.

As goals tell us what we want to accomplish and how we will accomplish it, they are usually written using the words "to" and "by". Let's look at an example. The Nisga'a Nation in northern British Columbia have been working towards building youth leadership and a youth voice in their community. They recently started Youth Councils in their region. The goal of the Youth Councils has been described as follows:

To strengthen the Nisga'a Nation by building sustainable community youth leadership, enabling youth to realize their strengths and potential and providing youth with the opportunity to contribute to their community

As previously discussed, if we were to look only at this goal we might feel overwhelmed. "***Strengthening the Nisga'a Nation.....***" is a big task to take on, but if we explore this goal further, we can imagine the little steps we might take to move closer to this goal.

For example, the roles and responsibilities developed for the Youth Councils outline some little steps to the overall goal. The roles and responsibilities tell us that Youth Councils will:

- consult with Village governments, Elders and other resource people regarding the concerns of Youth 15-29 years of age
- discuss, voice concerns and advocate for Youth in their community
- promote and enhance cultural awareness and the identity of the Nisga'a Culture
- develop partnerships with service providers and interested organizations in providing services to Youth in the community
- provide presentations on the Nisga'a Youth Advisory Council

Still feeling a bit overwhelmed? Like we said, goals sometimes seem too challenging when considered on their own. For example, in rural remote northern or aboriginal communities where funding is often in short supply, usually the people trying to accomplish the work

that needs to be done in the community are community volunteers. These volunteers often have very busy lives – just like the youth on the Nisga’a Youth Councils. How can the goal of Youth Councils be reached when Youth Council members have limited local support, few resources, jobs to keep and lives to live? **They go ahead, one step at a time!**

2. What small steps can we take to get to our goal? (Objectives)

Although it is important to understand everything you strive to achieve, it is important to realize that achievement is most likely to occur with a gradual, phased-in approach to developing changes in your community. You have to move forward by taking small steps!

Communities need to walk before they run and experience small successes to develop a strong “*Together we can do it*” attitude. For this to happen, you need to develop some objectives. Objectives help break the journey to reaching a goal into manageable steps. They create achievable actions that are easy to evaluate and get done. Unlike goals, they are very specific in nature and leave no question about what is going to be done, by whom and by when. Objectives will also tell you how you will know you have done what you said you would do. Objectives are meant to be realistic targets, and are usually written in an active tense.

To ensure that objectives are achievable, we try and remember to write **SMART** objectives. **SMART** objectives are not complete without being **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime Based (**SMART**). **SMART** objectives must answer the following questions:

Is there a specific behavior/outcome in the objective that is linked to a rate, number, %, or frequency? (**S**pecific)

Is there a reliable system in place to measure progress towards achievement of the objective? (**M**easurable)

With reasonable effort is there a likelihood of success? (**A**chievable)

Can the people for whom the objective is about make an impact on the situation? Do they have the necessary knowledge, authority or skill? (**R**elevant)

Is there a finish and/or a start date clearly stated or defined in the objective? (**T**ime Based)

SMART OBJECTIVES

The reason we make sure we write **SMART** objectives is to ensure that the objectives are measurable. It is difficult to celebrate achieving something if you are not sure if you have actually achieved it. The more specific the objective the easier it is to celebrate its achievement. Consider the two example objectives below:

Objective One: **To host a youth forum with politicians to talk about youth policy issues**

Objective Two: **By November 2007, youth council will host a public policy forum with at least 75% of the Nisga’a politicians in attendance and at least 25% of community youth 15-29 years of age.**

Let’s see how **SMART** relates to each example objective. Use the **SMART** questions above to determine if each objective is **SMART**. As you look at each **SMART** question, write yes or no in the corresponding column.

	Objective One	Objective Two
Specific		
Measurable		
Achievable		
Relevant		
Time Based		

We can see from this exercise that Objective Two is a SMART objective but Objective One is not. Objective Two tells us exactly what is going to happen, by when and what our measure of success is. We know, for instance, that we will be successful if 75% of the politicians and 25% of the youth 15-29 years of age in the community attend the event. That will be something to celebrate! With this information the objective becomes more exciting and seems more possible than Objective One. Objective One seems less likely to happen and is so ambiguous that you may not know where to start.

Now let’s look at developing a **SMART** objective using our Youth Council example. One way to develop objectives for our goal for Youth Councils is to hold a **brainstorming session**.

Brainstorming is an activity where everyone gets to bring their thoughts and ideas forward without judgment from others. When participating in a brainstorming session, it is important to use your own words and your own thoughts regarding the issue – in this case the responsibilities of Youth Councils. We know that people participant most and exert the most effort towards things that are important to them. By using your own words, by ensuring your ideas come from within and not from the thoughts or direction of others, you begin to develop some ownership in the brainstorming process. You will be saying what is important to **you**.

It is also important to use a phased in approach to action and change. For example, the youth council has five responsibilities tied to its goal. Since the roles and responsibilities of the youth council help to define the goal of strengthening the Nisga’a Nation we can start working towards the goal by looking at these five roles and responsibilities. Although we could make objectives for each of these responsibilities, our action plan might be more manageable if we took each responsibility one at a time. Remember, it is better to have a short list of achievable objectives that you can celebrate once achieved, then to have a long list of objectives that you will be stretched to complete. Take it slow and easy.

Here's what a brainstorming process might look like.

Time needed: about 40 minutes

Material needed: Flipchart with paper, markers, small stickers of some sort

1. Take one of the five responsibilities of Youth Councils and write it down on the top of a piece of flipchart paper
2. Ask participants to tell you what this role/responsibility means to them. For example say, "When you hear the words of this role/responsibility what do you think of? What would have to happen/change for this role to be complete? Get participants to list as many ideas as they can. Tell participants you will do this for the next twenty minutes. Get someone to be the time keeper and get started.
3. Do not criticize any comments. Anything goes, the crazier the better.
4. Piggy back on the ideas of others. One idea may prompt another, however similar it may appear.
5. Write every contribution down.
6. When you run out of ideas, take a moment to read over what's been written and get any additional ideas.
7. When the 20 minutes is up Stop. Go through the list and eliminate duplications (make sure they mean the same thing)
8. If necessary, expand on ideas that need further explanation or perhaps shorter ideas that can be stated using fewer words.
9. Once you have made all of your adjustments and everyone understands each idea, write the list of ideas on a new sheet of paper, numbering each idea
10. Give each person 10 stickers to use to vote for what ideas are the most important to them by placing their stickers beside the idea. They can use all their stickers on one choice, or spread their stickers around to many choices.
11. After everyone has placed their stickers simply count the stickers for each idea. The idea that got the most stickers will be your starting point for your action plan.
12. Use this idea to write a **SMART** objective for that specific Youth Council role or responsibility
13. Make sure participants understand that the group has not lost all other ideas, this is just where you will begin your work. All other ideas will be kept and will be used to continue to move forward in the development of future action plans.

Now lets go back to our Nisga'a Youth Council example. Let's say that we used the first Youth Council responsibility in our brainstorming session:

"Consult with Village governments, Elders and other resource people regarding the concerns of Youth 15-29 years of age"

Our flipchart might look something like this:

Role/responsibility: consult with Village governments, Elders and other resource people regarding the concerns of Youth 15-29 years of age

- create opportunities for youth to get together to identify concerns
- increase the participation of youth in youth lead events
- find ways to get Elders to listen
- find out the important issues to bring to Village Government
- hold a youth forum with politicians to talk about policy issues
- Etc
- Etc
- Etc

After the sticker vote, say that “increase the participation of youth in youth lead events” got the most votes. Our next step is to take this idea and create a **SMART** objective (**S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime Based).

Let’s start first with the words we have now for our objective.

“To increase participation of youth in youth lead events”

Is this specific? No. We don’t know by how much we will increase participation of youth, or what age of youth, etc.... And what events? What does participation mean?

Is this Measurable? Well, we can count the people that come out to meetings but we have to have something to compare these numbers to if we want to increase participation

Is this Achievable? Yes the concept is achievable, but until we have specifics we can’t say for sure. For example, if we want to increase participation by 10%, this might be achievable but if we want to increase participation by 100% we may have a problem achieving the objective.

Is this Relevant? Yes, we know that youth encouraging youth is an effective way to increase youth participation and since the volunteers that will be working on this objective are youth themselves, this objective is very relevant.

Is it Time Based? No, there is no time set for this to be completed

So let's try again.

By June 2008, the Kincolith Youth Council will increase the attendance of community youth ages 20-29 yrs. by 25 % for their quarterly membership meetings.

Is this specific? Yes, we are increasing the attendance of youth ages 20-29 by 25% for quarterly membership meetings and specifically for the Kincolith Youth Council, not necessarily all the Youth Councils

Is this Measurable? Yes, we can take attendance now and compare the attendance records in June 2008.

Is this Achievable? Yes, now the objective is achievable because we know exactly what we have to do.

Is this Relevant/Realistic? Yes, it is still relevant because we need more participation of this age group.

Is it Time Based? Yes, it must be complete by June 2008

Once you have written down your **SMART** objectives you will feel a sense of relief and direction. No longer will you feel fuzzy about what you want to accomplish. You will also feel inspired to move into action. When we are clear on what we want to accomplish, it becomes much easier to create actions or activities to move ahead.

3. Why are we taking these small steps? (Long Term Outcomes)

Many groups often jump from developing objectives right into developing activities when creating an action plan. This is like creating activities for the sake of doing something – anything – to move ahead. In the CARS process we believe that there is not much sense in rushing into developing activities until you have identified the expected long term outcomes of your objectives. This is creating activities for a purpose. Long term outcomes are the changes you expect to see over the next 3-5 years by meeting your objectives. Long term outcomes answer the question “so why are we taking these small steps?” You can be taking the same step for many different reasons, and those reasons will help define what activities will be most successful in taking your small step. Let's proceed with our example objective.

By June 2008, the Kincolith Youth Council will increase the attendance of community youth ages 20-29 yrs. by 25 % in quarterly membership meetings.

Let's ask the question “Why are we taking this small step?”.....so what if we increase the attendance of community youth ages 20 -29 years of age by 25% in quarterly membership meetings.....what will that do for us? Why would that be a good thing to accomplish? What difference will it make in our community? To Youth? To Elders? To Government officials? To others? Brainstorm all the possible long term outcomes or benefits of your objective. Take the time to think about why you are contributing your time to work on this objective or on any other objective of your group.

Some examples of expected long term outcomes for this objective might be:

- Greater understanding for the elders and politicians on issues of older youth
- Stronger youth voice
- Stronger leadership in youth councils (wisdom and experience of older youth)

Can you think of others? Once we have our long term outcomes, we can start creating activities that respond to both the objective and our expected long term outcomes. Let's see how this might be done.

4. What activities will help us to complete these small steps? (Activities)

Activities are the actions you do to reach your objectives. Activities are usually developed by asking the question “to fulfill this objective, what could we do?” The challenge of any group is to not have too many activities to do all at once. It is usually not difficult to think of activities to move our objectives forward, but often it takes considerable time to complete the activities we choose to do. If you have too many activities happening all at once, it is also more difficult to track your progress, share your successes or deal with the individual challenges that any one of your activities create.

In the CARS process, it is critical that we have a clear action plan that explains how our chosen activities will be completed. This action plan should leave no question as to what an activity will be, who will be involved in making sure the activity happens, when it will be completed, what resources are needed and a way to check off when all the work is complete. We use the following format to create a detailed description of our activities for our action plan.

ACTION PLAN TEMPLATE

Objective: **By June 2008, the Kincolith Youth Council will increase the attendance of community youth ages 20-29 yrs. by 25 % in quarterly membership meetings.**

Activities/Action	Necessary Steps	Who will do this?	By When?	Resources Needed (financial/other)	Date Completed

Let's choose some activities by going back to our brainstorming session format. This time however, let's brainstorm all the activities we can think of that might help us meet our objective and our long term outcomes. Remember how the brainstorming session worked? If not, give this section a quick review (page 5-6). Let's say we held our brainstorming session and once complete we had chosen the following activities for our objective:

- Bring a Buddy Event
- Door prize draws at each membership meeting
- Child care provided at each membership meeting to support young parents to attend

Let's take the first activity – Bring a Buddy Event –and work it through our template.

ACTION PLAN

Objective: **By June 2008, the Kincolith Youth Council will increase the attendance of community youth ages 20-29 yrs. by 25 % in quarterly membership meetings.**

Activities/Action	Necessary Steps	Who will do this?	By When?	Resources Needed (financial/other)	Date Completed
“Bring a Buddy” Event to be held at the spring quarterly membership meeting on May 16th	Take attendance at every meeting leading up to May 16th event	Harry and Sue	Begin immediately and continue until May 16th	Attendance forms and pen	
	Develop the instructions/ rules for participating in the event	Mary, John and Bill	April 16th	Meeting space	
	Create posters advertising the event	Sue and Richard	April 26th	Paper, markers, money for radio spot	
	Gather prizes for the event (must be listed on advertisement)	Chris and Ben	April 20	Money for first, second and third prizes totaling \$500	
	Distribute posters around town	Youth council members	May 1st	Thumb tacks and/or tape	
	Host the event	Youth Council members	May 16th	Refreshments and snacks	
	Monitor changes in attendance at youth membership meetings for six months after the event	Harry and Sue	October 31	Attendance form and pen	

Now you are ready as a group to move forward and begin working on your activities to achieve your objective. Before you dive right in however, we are going to look at some measures of our success. Measures of success help us to determine when we need to celebrate. Measures of success are tied to our expected short term outcomes in moving forward. Short term outcomes usually related to 3-6 months into the future and are usually connected to changes in one of four areas: skills, knowledge, attitudes or behaviours. Long term outcomes are developed looking at our objectives, but we develop short term outcomes in relation to our activities. Let’s have a look!

5. What changes in skills, knowledge, attitudes or behavior can we expect from our activities? (Short Term Outcomes)

It’s great to create activities. They give us something to do and help us move our issues ahead. But again, you can’t do activities just for the sake of doing something. Like your objectives, your activities should be meaningful and be a part of the long term change you want to make in your community. For example, it is one thing to “hold a dance”. It is another thing to work at changing high risk youth behaviours in your community, like drinking or drugs, by providing alternative activities to these high risk behaviours. One of the alternative activities might be to come to a dance. Being this specific in our actions and taking the time to really decided why we have chosen a particular activity will help us mobilize community resources - especially when we are exploring potential funders both inside or outside of our community.

What we need to do next in the CARS process is look at our planned activities and explore what short term changes we are trying to effect. Do you want to:

- build skills in others
- change attitudes in your community
- change behaviours of people in your community or
- increase the knowledge of your community about a specific issue or need?

To do this we take each Activity and explore why we think we are doing these activities. Short term outcomes often start with words like “enhance, encourage, increase, improve, alter, new, more, etc.... Let’s try the three activities from our brainstorming list.

Activity	Short Term Outcomes
Bring a Buddy Event	<ul style="list-style-type: none"> • Increase in the number of community youth who know what happens at youth membership meetings (increase in knowledge)
Door Prize Draws at each membership meeting	<ul style="list-style-type: none"> • Encourage more youth to attend the membership meetings (change in behaviour)
Child care provided at each membership meeting	<ul style="list-style-type: none"> • Youth realize the need to support the participation of youth who are young parents (change in attitude)

Now that we know why we are doing our activities, it will be a lot easier to create “indicators” or measures of our success.

6. How will we know that we did what we said we would do? (Indicators of Success)

Indicators of success are predetermined measures used to gauge our progress. Indicators of success are critical to the evaluation of your work plan or action plan. They basically tell us how we will know that we did what we said we would do.

When developing indicators of success in the CARS process, we start with our short term outcomes. For each outcome we try and ensure we have at least one indicator of success that will allow us to measure our progress towards this outcome. Good indicators of success are those that are relevant to your outcomes and your objective. It is important as well that each success indicator is easy to understand, easy to measure and when measured, will give you information you can depend on – information that is credible. The best way decide on what indicators of success you will use is to once again brainstorm all possibilities and then summarize and prioritize this list into a manageable group of indicators that you are comfortable working with. Indicators usually are written using words such as “number of, percent, amount, evidence of, etc.. When we write down our indicators we also write down how we will measure each indicator. It is of little use to choose an indicator of success that would be impossible for you to measure. Some ways that we measure indicators of success are through statistics, questionnaires, focus groups or other forms of data collection. Let’s look at an example that uses our previous short term outcomes.

Outcome	Success Indicator	Method of Measurement
<ul style="list-style-type: none"> Increase in the number of community youth who know what happens at youth membership meetings 	The number of youth attending the meeting who can answer simple questions regarding the meeting	Short multiple choice questionnaire for youth to fill out prior to leaving the meeting
<ul style="list-style-type: none"> Encourage more youth to attend the membership meetings 	Evidence of an increase in the number of youth attending membership meetings	Attendance at the meetings before and after offering door prizes
<ul style="list-style-type: none"> Youth realize the need to support the participation of youth who are young parents 	Evidence of an increase in the number of young parents attending membership events who feel welcomed at these events	Collection of short information sheet for all participants at the meeting anonymously identifying whether participants are or are not parents

Once your indicators of success are in place you are ready to move ahead with your activities to achieve the desired results. If you want, you can bring all this work together into one summary using the format below.

ACTION PLAN SUMMARY

Objective: By June 2008, the Kincolith Youth Council will increase the attendance of community youth ages 20-29 yrs. by 25 % in quarterly membership meetings.

Long Term Outcomes	Activities	Short Term Outcomes	Indicators of Success	Method of Measurement	Who's Responsibility
Stronger youth voice	Bring a Buddy Event	Increase in the number of community youth who know what happens at youth membership meetings	The number of youth attending the meeting who can answer simple questions regarding the meeting	Short multiple choice questionnaire for youth to fill out prior to leaving the meeting	Members of the Kincolith Youth Council
	Door Prize Draws at each membership meeting	Encourage more youth to attend the membership meetings	Evidence of an increase in the number of youth attending membership meetings	Attendance at the meetings before and after offering door prizes	Two council members are assigned to each meeting to take attendance
	Child care provided at each membership meeting	Youth realize the need to support the participation of youth who are young parents	Evidence of an increase in the number of young parents attending membership events	Collection of short information sheet for all participants at the meeting anonymously identifying whether participants are or are not parents	The two council members who are assigned to each meeting to take attendance

7. How will we share our progress and what we have learned with others? (reporting requirements)

Once you have completed your action plan it is important to write and reflect on:

- what has been accomplished,
- what challenges were identified
- what solutions were developed
- what lessons have been learned.

This is valuable information for you in the development of your next action plan and will be particularly critical to any reporting requirements for those who have contributed money or resources to help with the completion of your work. As long as they are read, reports play an important part in the success of your community work.

It is very difficult to stay on track with community work unless we can see where we are going. Reports help us monitor where we are going and how well the work is progressing. A project is not complete unless it is monitored. Monitoring must be recorded and communicated and that communication usually takes the form of a written report. Written reports also suggest lesson learned and recommendations for future action. As such, good reporting helps sustain community action by using the journey towards each activity as a means to form the next community action or event.

When we write reports our goal is to have these reports read, not simply filed away. To do that, you must write them so that they are easy to understand, and that they invite the reader to read the report from beginning to end. What you will write in your report is really based on three things:

- Who your intended audience is (is it the community, a funder, a government department, etc.)
- Why they would want to read your report (monitoring, information, identifying needs, etc...)
- What your reader needs and wants to know from your report

Regardless of who the audience is, it is important to remember to emphasize results over activities. Go beyond simply describing activities to highlighting what happened because of the activities. Here is an outline for writing your report.

- Introduction (including background to project)
- Project objectives
- Project successes in reaching objectives (factors, causes)
- Project failures in reaching objectives (reasons)
- Community contributions (donations, inputs eg. labour, cash)
- Necessary changes in strategies)
- Unanticipated problems
- Lessons learned
- Recommendations from lessons learned

Remember that every report should compare what was expected or desired with what happened by:

- Emphasizing results of actions taken over description of the actions themselves
- Writing as concisely as possible
- Organizing your report using sub titles
- Adding pictures where appropriate
- Placing key messages in highlighted text boxes on the sides, top or bottom of each page.

Have fun with your presentation and people will be interested in reading your report!