



How to Develop Relevant and Realistic Action Plans

1. **Involve the right people in the planning process.**
Get input from everyone who will be responsible to carry out parts of the plan, along with representatives from groups who will be affected by the plan. Of course, people should be involved if they will be responsible to review and authorize the plan.
2. **Convey that the recurring planning process is as important as the plan document.**
Far too often, primary emphasis is placed on the plan document. This is extremely unfortunate because the real treasure of planning is the planning process itself. During planning, planners learn a great deal from ongoing analysis, reflection, discussion, debates and dialogue around issues and goals in the system.
3. **Ensure the nature of the process is compatible with the nature of planners.**
For example, the linear nature of the traditional top down planning process, such as that typically used in strategic planning, may feel rigid for some planners. If so, consider other less linear ways to conduct planning.
4. **Build in successes early in the planning process.**
For example, build in activities that seem straightforward and for which resources are readily available, such as convening a project team or developing a project schedule.
5. **Organize the plan into phases.**
For example, Phase I of the project might be focused on generating a report and Phase II focused on implementing the report. That approach helps to make the planning and implementation of the overall plan more comprehensible and easy to manage.
6. **Consider the key aspects of any major plan.**
Key aspects include the following: (Note that, depending on the nature and needs of the planners, your client might choose to use different terms for these aspects.)
 - Outcomes
 - Goals needed to accomplish each outcome
 - Deliverables that will be produced, and can be measured
 - Resources needed to achieve goals and outcomes
 - Objectives needed to accomplish each goal
 - Schedule to achieve each objective
 - Responsibilities to achieve each objective
 - Budgets to obtain and support achievement of each goal
 - Who will monitor accomplishment of each goal and/or objective.

7. **Sequence the actions in the order in which they're typically done in organizations.**
For example, don't specify that fundraising will be done before building the Board, strategic planning, program planning, facilities planning, marketing planning, and financial analysis.
8. **Integrate methods to achieve goals with other current activities.**
If the plan describes methods to achieve an overall goal, consider how those methods can be integrated with ongoing activities in the organization. For example, if the plan is about developing the Board or improving a program, include those new activities in the nonprofit with current strategic planning or program evaluation activities.
9. **Describe how the plan can be changed.**
Few plans are ever implemented exactly as intended. Therefore, it is important to specify how plans can be changed. Consider including the following procedure in each plan document.
 - a) Notice the need for the change, why it is needed and what it should be.
 - b) Notify leaders of the proposed change before making the change.
 - c) Get approval for the change.
 - d) Make the change and revise the dates of the document.
 - e) Notify key stakeholders of the change, describing the reason for it, how each stakeholder is affected, and whom to contact if they have questions."
10. **Write down the planning information and communicate it widely.**
Project planners often forget that others do not know what the project planners know. Even if people do communicate their intentions and plans orally, chances are great that others will not entirely hear or understand what the planners want done. Also, as plans change, it is extremely difficult to remember who is supposed to be doing what, according to which version of the plan. Also, key stakeholders may request copies of various plans. Therefore, it is critical to write plans down and communicate them widely.
11. **Celebrate the production of the plan document.**
It is easy for planners to become tired and even cynical about the planning process. One of the reasons for this problem is that, far too often, emphasis is placed only on achieving the results. Once the desired results are achieved, new goals are promptly established. The process can seem like having to solve one problem after another, with no real end in sight. Yet when one really thinks about it, it is a major accomplishment to carefully analyze a situation, involve others in a plan to do something about it, work together to carry out the plan and actually see some results. So acknowledge this – celebrate your accomplishments.