



# Action Plan Tool!

Introduction to the AMSA Action Plan Tool © 2008/2011.

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**This packet will help you develop goals and strategies of your project, in order to improve its chances for success.** This same process can be used for any project you work on in the future.

This tool asks you to think about your objectives, short-term & long-term goals, audience, resources, allies, obstacles, etc. In essence, this tool helps you to develop your strategy – so that you can hit the ground running!

This tool may not address all of the elements that go into your project. If you think of more information that you'd like to include to make the programming description(s) complete, please feel free to include it. Be forewarned, though, that if you list 9 goals, you may be missing the purpose of this tool as a mechanism for *focusing* your work. ☺

**The Action Plan Tool (a blank form for you to use) is five pages (the final five pages). The nine pages preceding the blank form contain guidelines and examples.** The same example is not carried through the entire document -instead different examples are used to clarify each step.

Your completed Action Plan form may be as long or brief as is necessary to communicate your vision. Feel free to reach out to facilitators now or in the future if you have any questions or need guidance.

**A suggestion:** After you fill out your form, re-read it and play devil's advocate. We can also play this role for you. Try to explain why you picked that strategy over another, why that vehicle for communication over another, why those allies instead of others. Try to hone your answers until you are convinced that they are the best possible answers – and therefore the best possible strategy – for your goals under your circumstances. **This exercise is what makes this Action Plan Tool powerful.**



# Action Plan Tool!

Name: My Name

Project Title: My Project

## What is your project's mission sound-byte? [Which one to three sentences concisely describe your mission?]

*This section should be articulate-able in absolutely no more than three sentences. No cheating with run-on sentences!*

**Example:** Medical Education Weekend Training Session is dedicated to supporting medical students interested in being leaders in medical education, refining their teaching skills, and working to improve medical education at local or national levels. We accomplish these goals 1) by teaching students a) educational pedagogy, or the science and art of teaching, b) skills for teaching, and c) leadership skills, and 2) by providing students with resources to accomplish their own medical education projects.

A sound-byte answers the question, "what is your purpose?" Sound-bytes are brief, jargon-free, and address how you fulfill your purpose in as-specific-as-possible language without being more than three sentences in length.

## What are your programming goals? [That is, what do you want the programming to ultimately accomplish?]

*This section can be as long as necessary, but should be articulate-able in one to five bullet points or sentences.*

**Example:** We plan to (1) provide Medical Education (or MedEd) Leadership resources to interested medical students, (2) empower these students to develop their individual medical education project, and (3) worked as a team to identify, prioritize, and address national MedEd needs.

The goals are what you expect to see at the end of your programming and/or what your programming accomplishes. These do not have to be in past tense, although that may help in their construction.

## What are your strategic objectives? [What are you going to DO to accomplish your goals]

*Remember SMART and SWOT (see below). Use as many rows as project objectives you plan to undertake.*

What will you do?	When will you do it?	What is the intended outcome?
<b>Example 1:</b> Design and run a workshop designed to teach medical students how to educate their patients and have students practice with people acting as patients	Curriculum developed by September. Student handouts by October. Actor training in November. Workshop on December 18 <sup>th</sup> .	165 students have: 20-min lecture introducing them to the skills necessary to educate patients, followed by 2-hour hands-on experience to practice and a 20-min reflective wrap-up session
<b>Example 2:</b> Create a center in the emergency room waiting area at the local hospital, where students get practice educating patients. Patients with a long wait will learn more about important healthcare topics (diabetes, quitting smoking, etc)	Meet w/ emergency room administrators by Feb. Develop handouts by April. Train students by May.	Improve the health education of local community members (emergency room patients & their families) and improve medical student patient education skills

Objectives are your short-term goals.



# Action Plan Tool!

Objectives should be **SMART**: **S**pecific, **M**easurable, **A**chievable, **R**ealistic, **T**ime-related.

Objectives should also take into account a **SWOT** analysis. (See next page for information on **SWOT** analysis)

To help understand how these examples follow **SMART**:

## **Specific-**

Example 1: is directed specifically to medical students, and the type of workshop is interactive.

Example 2: is directed specifically at the local community, it will be in the emergency waiting area

Specific reminds you to think of exactly what group of people you will be working with and exactly what you hope to do with them or exactly what you hope to provide for them.

## **Measurable-**

Example 1: we can measure how many students participate, we can measure how interactive the our workshop is

Example 2: we can measure how many students we train and how many actually participate, we can measure how many patients we talk to

If you make your objective measurable right from the beginning planning stages, you have something to measure at the end. This will help you understand how successful you were in reaching the objective.

## **Achievable-**

This is asking the question: Is it actually possible to complete this objective? You know the above examples are achievable because similar projects have been undertaken. It is reasonable to think that you can train students at your school to get better at a skill. It would be unreasonable to think you could train every student in the country in that skill.

## **Realistic-**

You must be realistic with your goals or you cannot meet them. Do you have enough people to do the work needed to reach your goal? Do we have enough money, supplies, or other resources? Enough time? It is wonderful to dream big and know that your project is contributing to a larger dream, but it is okay scale back a project as we learn what limitations we have.

## **Time-related-**

Time-related here means 1) "timely": relevant to the audience you want to work with or related to current events and 2) "on time": is focused on a timeline you create so that you and others working on your project have clear, concrete tasks to accomplish with clear deadlines

## SWOT

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**SWOT** = **S**trengths, **W**eaknesses, **O**pportunities, **T**hreats. Strengths and Weaknesses are internal characterizations of the organizing team. Opportunities and Threats are external to the organizing team.

### **SWOT in a nutshell:**

When developing an objective, think of what you and your team are good at (strengths) and what you are not (weaknesses). Examine all possibilities of ways you can move toward your goal. Pick those possibilities (opportunities) that fit well with your strengths and are not impeded by your weaknesses. Further, there may be threats to an opportunity (regulation, difficult school administration, competition for the same audience, time, or resource, etc) that would help you decide against some opportunities in favor of pursuing others.

### **For example:**

You and your planning team this year may have a lot of experience and passion surrounding research and publications. This is a strength.

Further, you and your team have minimal experience with organizing large events or don't have the time or money to travel around the country spreading your message. These are weakness.

Assume your goal was to inform medical students about an important issue and your team brainstormed three ways to move toward your goal: 1) Hold a national/regional rally, 2) Undertake a grassroots lunchtime lecture organizing campaign, & 3) Construct a web resource to inform & engage students on the issue. These are your opportunities.

However, the rally site you're considering is very expensive, and there are many other student organizing groups relying on the same audience for rallying. Further, the network of students interested in your issue is largely very fragmented. These are all threats.

A SWOT analysis of the example: **Choose developing a web resource**. Your strength (research/publication) is better suited to constructing a web-resource than other opportunities. Further, the tasks involved with conducting a national event and/or grassroots campaign are weaknesses for you. Also, there are external threats that make both organizing a rally and conducting a grassroots campaign less attractive. Yet this is a resource medical students need but does not exist – you have an opportunity to fill that void.

# Action Plan Tool!

For each of your Strategic Objectives:

## Who is the audience and how will you reach, energize, and/or empower them?

Use as many rows as project objectives you plan to undertake. Bullet-points or keywords are preferred.

Objective	Who is your audience <sup>1</sup> ?	Which messages <sup>2</sup> will you use?	Which vehicles <sup>3</sup> will you use?	How will you ensure buy-in <sup>4</sup> ?
After school educational classes	Classmates and students from other schools	My issue is important and fun to address! (Educational and Action Message)	Workshop sessions, flyers, emails to local schools	Invite other students and faculty members to plan sessions
Build an Activist Network that can respond to an issue	Local activists interested in my issue	Together we can make change (Action Message)	Emails to listserves, sign-up lists at meetings, local educational events.	Involve activists in planning stages; explain which of their skills we most need
Call-In (an organized outreach to your legislative representative to influence their opinion or vote on an issue)	Congress	Let me help you understand this bill because it affects our community in important ways, and the people who elected you care about it.	The Phone	Explain why this bill is mutually beneficial and consistent with the congressman's values & positions

<sup>1</sup>Audiences are always people, never concepts or things. Selecting an appropriate audience is key. Many times they will be fellow medical students, particularly for peer projects and meetings. However, they can be anyone, from policy makers to curriculum committee members.

<sup>2</sup>Vehicles should be tailored to the audience (e.g., web vehicles should only be used to reach web-capable people).

<sup>3</sup>Messages have to connect with the needs of your intended audience. School admin, for example, need to demonstrate responsiveness to their students, and politicians are accountable to their constituency. Action messages should be used for audiences already aware of the importance of your issue and ready to take action – for the unaware audience, educational messages should be used first to raise the awareness that supports action steps.

<sup>4</sup>Your audience will either agree or disagree with your plans. Their reaction will be based in part on your proposal, but much of it will have to do with *how* you propose it. Convincing your audience of their desire to join you is called creating "buy-in"; this is one of the most critical parts of your strategy. **Example:** If you want to get your Curriculum Committee to incorporate a unit on Intimate Partner Violence, you may want to consult the committee during your planning stages, so that they feel involved and invested in your project. Approaching them with a plan that is 100% worked out may just offend them and put them on the defensive. **Buy-in makes potential adversaries into allies.**

# Action Plan Tool!

## What resources will you use?

Use as many rows as objectives you plan to undertake. Distinguish between resources you have vs. want (or need if it's critical).

Objective	Resource(s)	Have or Need?
Regional Programming	<ul style="list-style-type: none"> <li>\$1,000 for chair/coordinator travel to Regional Conferences</li> <li>Regional Conference Time / Space</li> <li>Listserve to sign participants into / keep us connected</li> </ul>	— Have — Need — Need
Activist Network	<ul style="list-style-type: none"> <li>Network email list</li> <li>Webspace for Activist Resource</li> <li>Local Project Grants to support local programming</li> </ul>	— Have — Need — Need
Call-In	<ul style="list-style-type: none"> <li>Conference call set-up for call coordinators</li> <li>Listserve to send out call materials</li> <li>Cell-phones in the hands of call-in activists</li> </ul>	— Have — Have — Want

A resource is a tool, money, skill, or other item consumed or utilized in the process of your programming. Please do not list "time" as a resource, since it's a given that you'll need time. Don't list people, either, since they'll be listed below.

Feel free to list as many resources as you plan will be involved in undertaking your objective(s). These cells can expand to as large as necessary – you are in no way limited to three resources per objective.

Within a single objective, please do not list things that you plan to develop as part of your programming (for example: web-page resource). Instead, list resources you will need to develop your deliverable (for example: web-space).

Do not include your full budget here, but please list money you already have (from your budget or already obtained grants) separately from money you need (from your school, pending grants, or external funders).

In most cases, the vehicles listed in the previous page are also resources you will use. Please list them here, too.

To reiterate: Please distinguish between resources you have v. need using the right column.

# Action Plan Tool!

## Who will you partner with to accomplish your objectives?

*Use as many rows as project objectives you plan to undertake. Please distinguish between partners you have vs. want (or need, if it's critical).*

Objective	Partner	Have or Want?
Educational classes	<ul style="list-style-type: none"> <li>• Faculty</li> <li>• Speakers from outside of school that are experts on this issue</li> </ul>	<ul style="list-style-type: none"> <li>— Have</li> <li>— Need</li> </ul>
Build Activist Network	<ul style="list-style-type: none"> <li>• Person that is an expert in web-resources</li> <li>• Others that care about My Issue</li> </ul>	<ul style="list-style-type: none"> <li>— Want</li> <li>— Want</li> </ul>
Call-In	<ul style="list-style-type: none"> <li>• Policy experts on this issue</li> <li>• People from AMSA or other organizations that can give advice on how to do this</li> <li>• People who have organized this kind of thing before</li> </ul>	<ul style="list-style-type: none"> <li>— Want</li> <li>— Need</li> <li>— Have</li> </ul>

It's important to build a strong team. This is your project and is based on your vision, but how might seeking additional assistance or additional input enhance your project? The old saying goes "two heads are better than one," and when it comes to good, talented, hard-working heads, ten are better than two. And experts are better than just you working alone.

So long as you define the role that each individual will play, you can capitalize on their assets without fearing losing control of the project.

Also remember that you won't be in medical school forever. If you want your project to continue year after year, you'll need both administrators and students to be involved and committed. The sooner you get them involved, the more invested in your project they'll be – and the more you'll be able to delegate, divide and conquer, and oversee tasks rather than getting tied up in the trenches.

Feel free to utilize AMSA as a resource. The National Office has many student experts, working for a year in DC, who can advise from afar or who can fly out to your medical school to help. So be sure to ask us if there's something you think we can help with!

# Action Plan Tool!

## What potential barriers will you face?

Identify the 3 most likely barriers to your project. (here going back to our original example from strategic objectives)

Potential Barrier	Why?	How will you overcome?
School Dean	She may pressure students to focus more on studying directly for classes in the curriculum	Preemptively reach out to the Dean and make a pitch as to why your project is good for the school and its students – that you are helping my doing all the work for something great the school can get credit for
Emergency Room Staff, especially intake/triage	Because they don't understand what it is that you are doing and that students have been trained to educate these patients	Meet with ER coordinators and any volunteer coordinators the hospital may have in advance. Explain the education students are getting, allow them to recommend changes to that education and to offer feedback of students' work. Adjust your objectives accordingly.
Patients	Without it being clear why you are approaching them in a waiting room they may be unwilling to talk to students or simply may not be interested in the topics/materials students are offering at this time.	If you can, get in touch with any community contacts in the hospital and work with them to make all of your educational topics and materials both relevant to your patient population and at appropriate health literacy levels. Welcome any other suggestions they may have.

By thinking through potential barriers in advance, you can either decide whether to alter your plans, going back and rethinking some of your objectives, or simply prepare for how you will overcome these challenges. Articulating why this may be a barrier can help you make that decision.

Barriers can be individuals or organizations that disagree with your project or have competing interests. They can be circumstances or anything else you creatively anticipate.

# Action Plan Tool!

## Timeline and Budget: How long will it take and how much will it cost?

*This should be in chronological order and should list each step in the action process. The steps should be as specific as possible, e.g., "Design flier for event."*

Step	Who is responsible?	Start Date?	Finish date?	Cost?
Design flyer to advertise to students	Club VP	Immediately	October 10 or 3 weeks prior to event	\$20 in printing costs
Reserve a room for event	Club president	Sept 15	Sept 21	Free through school
Order food to feed attendees	Club treasurer	October 15	Confirm order day of event	\$75 for food, \$10 for plates and plastic ware

Use this area of your worksheet to develop a realistic timeline that includes each individual step required to make your objectives happen. List all steps in the process in chronological order. Each step should be as specific as possible, e.g., "Design flier for event" vs. "advertise for event". Include as many steps as necessary to complete your objective. Assign someone to be responsible for each step and hold her/him/yourself accountable to these deadlines. Push back deadlines only if something about the situation has changed that requires rethinking your project or timeline. You may want to build in "buffer" time for steps you are not sure about so you can move the timeline back if needed.

Knowing what you need funds for in detail makes it easier for you to know what you need to ask from others or how much funding you must seek. Having this prepared increases the likelihood that you will obtain money from any funder. It also gives you a chance to be creative and consider alternatives – do you need \$20 for printing, or will your administration let you print for free? Are you co-sponsoring with another club that has access to free printing? Can you get donated food in exchange for advertising a restaurant? Etc. Keep track of these "donated" expenses to document the full cost of your activity and know what funding may be necessary if you repeat a project but do not have the same connection.

# Action Plan Tool!

## Evaluation Plan: How will you measure success?

*Use as many rows as project objectives you plan to undertake.*

Objective	Evaluation Plan
Educational sessions	<ol style="list-style-type: none"> <li>1. Did we meet the mark of 20 participants?</li> <li>2. Survey Session Attendees – what was good about the session? What could be better?</li> <li>3. What can you do to transition this to anyone who might continue the project, so similar strategies can be improved.</li> </ol>
Build Activist Network	<ol style="list-style-type: none"> <li>1. Survey Regional Activists – is the web-resource of high quality? What is good? What could be better?</li> <li>2. Compile survey feedback and use it to improve web resource.</li> <li>3. What can you do to transition this to anyone who might continue the project, so similar strategies can be improved.</li> </ol>
Call-In	<ol style="list-style-type: none"> <li>1. Did the legislation pass? Did it get through its “committee” to the main floor of the House or Senate?</li> <li>2. Survey participants – how many calls were made? To whom? How could the call-in be improved?</li> <li>3. What can you do to transition this to anyone who might continue the project, so similar strategies can be improved.</li> </ol>

Your evaluation plan answers: “What have you accomplished?” & “How would future efforts be improved?”

Publishable data requires that you ask your questions in a non-biased way, with adequate controls and may require IRB approval (the Education and Research Fellow knows more about this).

**Bottom line:** Good evaluation enables you to improve, enables you to: a) convince your school that your project is worth keeping, b) convince other schools to develop a project similar to yours, c) guide others in how to avoid your mistakes, d) publish your results and contribute to the field.

Always keep a running list of things that worked and did not work for your own future work and to help other leaders learn from your experience.

# Action Plan Tool!

Name: \_\_\_\_\_ Project Title: \_\_\_\_\_

**What is your mission sound byte?** [Which one to three sentences concisely describe your mission?]

*This section should be articulate-able in absolutely no more than **THREE** sentences. Please avoid run-on sentences!*

**What are your programming goals?** [That is, what do you want the programming to ultimately accomplish?]

*This section can be as long as necessary, but should be articulate-able in one to five bullet points or sentences.*

**What are your strategic objectives?** [What are you going to DO to accomplish your goals]

*Remember SMART\* and SWOT\*! Use as many rows as programming objectives you plan to undertake.*

What will you do?	When will you do it?	What is the intended outcome?

\* **SMART:** Specific, Measurable, Achievable, Realistic, Time-related.

\* **SWOT** = Strengths, Weaknesses, Opportunities, Threats.

# Action Plan Tool!

For each of your Strategic Objectives:

## Who is the audience and how will you reach, energize, and/or empower them?

Use as many rows as programming objectives you plan to undertake. Bullet-points or keywords are preferred.

Objective <sup>1</sup>	Who is your audience <sup>2</sup> ?	Which messages <sup>3</sup> will you use?	Which vehicles <sup>4</sup> will you use?	How will you ensure buy-in <sup>5</sup> ?

## What resources will you use?

Use as many rows as programming objectives you plan to undertake. Please distinguish between resources you have vs. need.

Objective <sup>1</sup>	Resource(s)	Have or Need?
	• • •	— — —
	• • •	— — —
	• • •	— — —

<sup>1</sup> Please use single keyword or key-phrase instead of a full description.

<sup>1</sup> These are the people your programming serves or targets – not yourself or other organizers.

<sup>1</sup> Messages = Communications about the programming that connects with audience needs / interests.

<sup>1</sup> Vehicles = Route your messages take to reach your audience.

<sup>5</sup> Buy-in = involving the decision-making powers so that they feel invested in your project and become allies rather than adversaries.

# Action Plan Tool!

## Who will you partner with to accomplish your objectives?

*Use as many rows as programming objectives you plan to undertake. Please distinguish between partners you have vs. want.*

Objective <sup>1</sup>	AMSA Partner	Have or Want?
	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>—</li> <li>—</li> <li>—</li> <li>—</li> </ul>
	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>—</li> <li>—</li> <li>—</li> <li>—</li> </ul>
	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>—</li> <li>—</li> <li>—</li> <li>—</li> </ul>

<sup>1</sup> Please use single keyword or key-phrase instead of a full description.

# Action Plan Tool!

**Timeline and Budget: How long will it take and how much will it cost?**

*This should be in chronological order and should list each step in the action process. The steps should be as specific as possible, e.g., "Design flier for event."*

Step	Who is responsible?	Start Date?	Finish date?	Cost?

# Action Plan Tool!

**Evaluation Plan: How will you measure success?**

*Use as many rows as programming objectives you plan to undertake.*

Objective <sup>1</sup>	Evaluation Plan

<sup>1</sup> Please use single keyword or key-phrase instead of a full description.