



ROBBY
CHAMPION

Planning for action, step by step

*An action plan may look simple,
but there's power in its making*

Action plans are an established way to encourage adult learners to apply what they learn in training to a real problem or goal.

For 15 years I've experimented with how to make action planning more than an obligatory training exercise. The vision that has kept me refining the action plan is this: At its best, action planning is powerful experiential learning.

What is an action plan? Its purpose is to plan how to solve a problem or challenge and to focus on one specific goal. As the name implies, the emphasis is always on step-by-step actions to be taken to reach the goal.

When I first used action planning, I watched workshop participants work independently on their plans. To some, developing an action plan was perfunctory. One day, I overheard a participant explain to a colleague who had never done an action plan that the quickest way was to "make a to-do list and slap a goal at the top of the page." Another said, "Action plans never really work out for me. When I return to my school, so many unexpected things happen that the action plan falls apart."

Those remarks pointed out a problem: The finished action plan is so simple and straightforward that the power of the strategic thinking

involved in developing it easily can be missed.

While participants are responsible for their own action plans, the trainer plays critical roles as knowledge resource, teacher, critical friend, and facilitator during planning.

The components of the action plan can vary. Here are six I now typically include, and lessons I have learned in guiding participants through developing a plan:

SELECT THE PROBLEM OR CHALLENGE

For many, the toughest part of action planning is clearly defining problems to tackle systematically. Not everything standing in the way of student achievement is a solvable problem under their purview. So the staff developer's guidance and explicit examples are essential to help participants select a problem.

The problem must be:

- Solvable;
- One the participant can impact;
- Related directly to the content of the training program;
- Important to solve but reasonable in scope; and
- One that cannot be solved with a simple purchase.

Pair participants for 30 to 45 minutes of collegial help as they work to identify a suitable problem. Encourage them to act as critical friends. They should listen and jot down notes (or create a web) while their colleague talks through the problem/challenge. After listening and questioning, the pair should help each other clearly state their respective problems/challenges, then check the problem statements with the five criteria above.

DESCRIBE THE GOAL

Participants must next focus beyond the

■
Robby Champion is president of Champion Training & Consulting. You can contact her at Champion Ranch at Trumbell Canyon, Mora, NM 87732, (505) 387-2016, fax (505) 387-5581, e-mail: Robbychampion@aol.com.

problem and establish a goal. Because meeting the goal can impact positively on student learning, the goal should be:

- Clear;
- Measurable;
- Realistic;
- Important to student learning.

Participants often can identify and write their goal statement midway through a workshop series. Include “sharing goal statements” on the agenda so participants with similar goals can connect and become resources for each other. While sharing goals aloud, use the criteria for goals above to help each other improve goals. Once participants have heard others’ goals, they often decide to tweak their own.

ANALYZE THE FORCE FIELD

A force field analysis is the most distinctive aspect of action planning and requires the most strategic thinking.

In *The Winning Trainer* (Gulf Publishing, 1989), Julius E. Eittington described it this way: “Force field analysis ... says to us: ‘Hey, don’t try to come up with a solution or change a situation before you know what forces at work underlie it. Be an expert diagnostician first, and then you’ll be a much better problem solver or change agent. So discern carefully the forces that are favorable to your desired goal (the driving forces) and those which are unfavorable (the restraining forces).’”

Some participants find the force field concept confusing so teach it as a step in diagnosing and understanding a problem. Demonstrate an analysis on a real problem and diagram it.

First have participants identify “restraining forces” that prevent solving their own problem. Focus on major hurdles, such as lack of time, unavailability of materials, and power struggles among staff members. Next, identify the “driving forces” propelling the work on the problem — either positive or negative. For example: My principal or superintendent wants this accomplished this year, or our school improvement effort requires that this problem be solved

now.

Participants often complete the force field analysis then lay it aside because they don’t know what to do with it. Force field analysis data become the ingredients for developing action steps.

LIST ACTION STEPS AND TIMELINE

Removing the restraining forces (or hurdles) is key to resolving a problem. Each restraining force must be addressed with one or more action steps. For example, if “lack of time” is a restraining force, list action steps aimed at carving out time.

Once participants understand that restraining forces must be dealt with in the action steps, they may wonder how many steps to include. The detail in an action plan varies depending on one’s planning style. However, the action timeline should always begin within a couple of weeks after participants adjourn. Otherwise, it’s too easy to lay the action plan on a shelf and forget about it.

PLAN MILESTONES, PROGRESS CHECKS

Envisioning milestones and ways to check progress keeps the work on the action plan focused.

Participants often wonder about the difference between a milestone and an action step. A milestone is a turning point that results from the action steps. For example, a milestone might be completing an important set of guidelines, distributing a survey, gaining consensus on a big issue, or holding an important event.

Tracking progress can be done in myriad ways: Keeping a log, assembling an album of pictures or student work samples, collecting agendas or notes from team meetings.

LIST NEEDED RESOURCES

Preparing a list of needed resources helps participants be realistic about the action plan. Examples of resources might include: funds, approval or support from particular people, expertise, books to read, places to visit, a network, or specialized training.

Because action plans are personal, devising a focused plan that uses what

Action plan worksheet

Start date _____ End date _____

1. Statement of the problem/challenge

2. Goal statement

3. Force field analysis

Hurdles

- _____
- _____

Drivers

- _____
- _____

4. Action steps/timeline Target dates

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

5. Milestones or indicators of progress

- _____
- _____
- _____

6. Resources needed

1. _____
2. _____
3. _____
4. _____

7. Skills and concepts I have learned here that will be useful in carrying out this action plan:

was learned can enrich learning for participants and teams. Equally valuable, a carefully devised action plan can provide the momentum for undertaking school and district change projects when participants return to work.

Action plans and updates can be part of follow-up training and a source of program evaluation data. As learning artifacts, action plans help track the impact of the training beyond attendance and participation and into what happens in schools and classrooms with students and teachers.■