

### ACTION PLANNER



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ABN 63 942 912 684, CRICOS Provider No: 00025B

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There are a number of documents and practical guidelines that have been used to inform this Toolkit. The sources used here are listed in the References section at the end of the Toolkit.

The contributions of Stephanie Power, Dr Ally Gibson, a large number of service staff and managers, and the panel of academic and practice experts to the development of the Toolkit are gratefully acknowledged.

This research was funded by an Australian Research Council Discovery Early Career Researcher Award (DE140101503).

**Acknowledgments**

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Once you have identified something about how staff engage that you think needs to change, or you have decided you want to engage with people directly about an issue you know about, you can use this tool to help you work out how to achieve it. You can use this to plan a project to engage with people directly, or a project to help yourself and other staff engage with particular stakeholders better.

The tool is designed to help you think through:

1. what your project is and what you need to do to achieve it,
2. who needs to be involved and why,
3. how they will be involved, and
4. how you will evaluate your project and tell people how it went.

**Action Planner**

Before you implement your plan, you will need approval from your organisation.

When you have identified something that you think needs to change, you can use **Tool 2 – Action Planner** to help you work out how to achieve it.

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| **Why we are doing this project**What is the issue about engagement that we want to address? Click here to enter text.What do we want to achieve? **[🛈](#i2" \o "How will taking action on this issue benefit us, other staff, or our organisation? How will it benefit people using our services, or other stakeholders?)** Does this issue relate to: [ ]  engagement with individuals about their own wants and needs,[ ]  decisions or plans for our whole service, or [ ]  decisions or plans for our whole organisation?Who are the people affected by this issue?   |

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| **Our ideas for what we can do***It is now time to brainstorm potential ideas to address the issue you would like to focus on. You may like to brainstorm with other colleagues to get their ideas. It helps to get all your thoughts down on paper, even if you don’t use them for your project. Remember, all ideas are useful!* *As you think about your ideas, consider whether they are possible in your service or in the organisation, whether they will be effective to solve your issue, and whether they are feasible projects for you to do.* *You may like to use a whiteboard or butcher’s paper for this process, or a mind mapping tool. You could create a mind map, a table, or a series of dot points – it’s up to you.* *Once you have brainstormed some ideas, choose one to focus on and use the next pages to start developing up your project plan.* |

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| **What we are going to do**What is our project idea?  How are we going to do it?   |

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| **Who is going to do it**Who are our team members?  Who are our project leaders?  What will be each person’s role? **[🛈](#i3" \o "This should include tracking the project timeline, managing the budget, and scheduling meetings)**  How often will we meet? **[🛈](#i4" \o "This will depend on how complicated your project is, and how quickly it needs to be finished)**   |

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| **Who else needs to be involved****Consumers**

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| Which of the people using our services, their families or support people need to be involved in our project?  | Why do they need to be involved?  | How do they need to be involved? **[🛈](#i5" \o "Are we just giving them information, or are we seeking their feedback, working with them to resolve an issue and find a solution, or are they being empowered to make decisions and take action themselves?)** | How will we invite them to participate? | What methods will we use to involve them? *For some ideas see* What engagement methods could I use? |
| Click here to enter text. |   |   |   |   |

**Staff**

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| Which other staff need to be involved? | Why do they need to be involved?  | What will be the roles of these staff in the project? **[🛈](#i6" \o "Are we giving them information, seeking feedback, are we working with them to resolve an issue/ find a solution, are we seeking approval, or are they helping us to implement our idea?)** | How will we invite them to participate? | How will we involve them? |
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**External stakeholders**

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| Does anyone outside of our organisation need to be involved? If so, who are they?  | Why do they need to be involved?  | What will be the roles of these other stakeholders in the project?  | How will we invite them to participate? | How will we involve them? |
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| **Practical Issues to Consider** |

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| **Time**How long will our planned project take? Click here to enter text.Is there a time limit by which we need to be finished?  How much time will we need to allocate in our schedules to complete this project?  How much time will we be asking each of the groups of participants to give to the project?[**🛈**](#i7)  |

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| **Getting people there**Are the people we want to involve close enough to us to participate in person? Do we need to find a way to involve them by telephone, internet or post? Are we, or they, going to need to travel?  Are any of the people we want to involve particularly difficult to reach? If so, what is our plan to address this?  What are the potential costs of participation to each of our stakeholders? **[🛈](#i8" \o "Consider service hours, travel, etc.)**  Do we need to reimburse them or provide an incentive? [ ]  No[ ]  YesIf so, what will this be? **[🛈](#i24" \o "Keep in mind that offering incentives can be costly and can affect who participates)**   |

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| **Making sure people can do what we’re asking of them**What knowledge and skills do we need to complete this project? **[🛈](#i9" \o "Consider specific skills and knowledge needed to involve people from different cultural and language backgrounds and to involve people with physiological or cognitive issues (e.g. knowledge about their decision making capacity and rights))**  Do we have these skills and knowledge? [ ]  No[ ]  YesDo we need some training or extra support? [ ]  No[ ]  YesIf so, what do we need and how will we access this?  Do we need resources such as interpreters, paid support people, communication aids, hearing loops, translated or large print information, or special technology? [ ]  No[ ]  YesIf so, how will we access these?  What knowledge and skills do our different stakeholders need to participate in this project? **[🛈](#i10" \o "Consider skills and capacity needed to participate in formal committees, issues with speech or hearing, other communication issues, literacy etc.)**  Do they have these? [ ]  No[ ]  YesDo we need to provide some training or extra support? [ ]  No[ ]  YesIf so, what do we need to provide and how will we provide it?   |

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| **Troubleshooting**This checklist is to get you thinking about some things that can create problems for effective engagement. You may not find they are all relevant to your project; however, this list will help you ensure you have considered all the potential problems you might encounter, before you start. You can cross them off as you deal with them, and there is space below each for your own notes. |

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| **Being open and responsive**[ ]  What do we believe about the value of consumers’ views, and how they should express them? How will we make sure we are open to their contributions? Click here to enter your notes[ ]  What are the power differences between the people we are asking to participate and ourselves that might affect our project?  ☐ How can we make sure all the participants feel empowered to contribute?  [ ]  How will we make sure we are open to other staff members’ views and contributions and properly respond to these?  [ ]  How will we make sure everyone shares an understanding and expectations about participation and its outcomes?   |

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| **Making people comfortable**[ ]  Do we know what attitudes and beliefs the people we want to involve hold about participation? **[🛈](#i11" \o "They might not think they can make a difference, might lack confidence, might not trust organisations, or have specific preferences for how they like to participate. This may be a result of their past experiences in life even past interactions with staff.)**  [ ]  Do the people we want to involve have a good relationship with each other, or with our organisation? **[🛈](#i13" \o "It is important to be aware of any tensions that might affect people's involvement or have an impact on your project.)**  [ ]  How will we address these issues to make sure everyone feels comfortable contributing? **[🛈](#i12" \o "E.g. There may be some good existing networks and relationships that we can use to help make sure everyone is included )**   |

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| **Being inclusive**[ ]  How diverse are the people we want to involve? How well do we understand these differences? **[🛈](#i14" \o "Consider cultural and linguistic diversity, religious diversity, sexuality, health status, mental health, disability and capacity.)**  [ ]  How might these differences affect participation in our project?  [ ]  What is our plan to address these issues?  [ ]  Is there more we need to know about each of these people before we can involve them effectively?   |

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| **Ethics and legalities**Are there any potential ethical or legal issues (e.g. consent, privacy)? [ ]  No[ ]  YesIf so, how will we deal with these?   |

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| **Evaluation and reporting plan** |

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| **How we will evaluate our project**Ongoing assessment of activities is important to contribute to performance monitoring and reporting. There are a number of key things to think about. 1. Your evaluation can include both the effects of the project, and the process of the engagement you have undertaken. Your evaluation should also consider whether the engagement has been real and meaningful for the people you have involved.
2. It is important to be clear about what change you expected to see, and who you expected it to affect. You might be interested in outcomes in areas such as: care; quality and safety; communication; efficiency and resources; appropriateness of services; health literacy; service accessibility; and timeliness of services.

*You may want to include feedback from both those you involved and others who weren’t involved in your project.*1. You need to decide how best to measure the change you expect to see. You might, for example, be interested in people’s verbal or written feedback about your project, or you might like to use service data, existing client survey data, clinical information, or specific measures designed for particular quality indicators.
2. You need to consider whether you are looking for short term outcomes, long term outcomes, or both. This will affect then how you want to measure your outcomes.

*Monitoring and evaluation should occur a number of times throughout the project.*1. You need to think about who will conduct the evaluation. Consider what skills they will need, and what resources are needed. Power differences between the people involved – such as between consumers, care and nursing staff, managers, and families – can affect how open people will be in their feedback. It may also be useful for different people to be responsible for different aspects or different stages of evaluation.
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| Why do we need to evaluate our project? How will the findings be used, and by whom?   |

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| Who will conduct the evaluation?   |

| What do we want to know about how our project went?What results or outcomes from our project do we want to measure? **[🛈](#i21" \o "This might include, for example, clinical outcomes, service outcomes, or the experience of consumers, families, or other staff. )** | How will we measure these outcomes? **[🛈](#i22" \o "This will depend on what outcomes you are interested in. Think about who is likely to be most affected by the change, and what benefits you are hoping to see. You might look at service data, give people a survey, or ask people directly.)** | When will we measure these outcomes? **[🛈](#i23" \o "Some outcomes might be short-term, and some might be long-term. It is important to measure your outcomes or gather feedback along the way to make sure things are going to plan.)** | How will we document what we find? |
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| **How we will report back about our project**How will we report back to all our different stakeholders? **[🛈](#i15" \o "Consider multiple options, such as newsletter articles, wall posters, staff meetings, resident’s/ clients’ meetings etc.)**  How will we report back to the organisation?  When will we report back on the results of our project?  What resources do we need to provide this feedback?   |

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| **Budget** |

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| **Direct costs**What will our project cost? **[🛈](#i16" \o "Consider travel, catering, printing of information, workshop materials, telephone calls, venue hire, interpretation or translation, training etc.)**

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| **Budget item** | **Estimated or quoted cost** |
| Describe item | $ Enter amount |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
| **Total** | **$ Enter total** |

How do we plan to access the funding we need?   |

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| **Other resources**What other resources do we need?  How do we plan to access these resources?  What other “in kind” contributions will the organisation need to make? **[🛈](#i17" \o "This includes staff time, printing and consumables, other resources without direct cash costs)**  Who needs to approve our budget?  When will we review our budget? **[🛈](#i18" \o "You should do this a number of times throughout the project to make sure you stay on track.)**   |

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| **Our plan**

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| **Steps we need to take to complete our project** | **When it will be completed** **[🛈](#i19" \o "You may also like to create a chart or calendar, if you prefer a visual timeline.)** | **Who is responsible** |
| 1. Describe Step 1 | Date | Team member |
| 2.  | Date |   |
| 3.  | Date |   |
| 4.  | Date |   |
| 5.  | Date |   |
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| 10.  | Date |   |

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| **Approvals**[ ]  Have we checked the organisation’s guidelines and policies and is our project in line with the organisation’s position about consumers and their contribution?  [ ]  Have we talked to our manager about our project and obtained their support?  Do we need any additional approvals? [ ]  No[ ]  YesIf so, who do we need to ask?   |

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| Once you have made a plan and have all the approvals you need, you are ready to start your project!Follow your plan, and remember to monitor your progress along the way.You can use the **Monitoring and Evaluation Tool** to help you monitor your progress. |