Creating a Workforce Analytics Action Plan

An action plan can be a useful tool for implementing workforce analytics, especially if there are multiple people involved in the process. This resource provides some general advice on action planning, with specific examples for advancing the use of workforce analytics.

What is an Action Plan?

An action plan outlines the actions, resources, and people needed to achieve goals. It is vital to strategic planning. Action plans include the following components:

- A well-defined goal
- Tasks/steps needed to reach the goal
- Individuals or teams responsible for each task
- Task milestones and timeframes
- Resources and data needed to complete tasks
- Evidence or measures to evaluate progress
- Desired long-term outcomes

Having this information in one place makes it easier to plan and to track progress.

Why Develop an Action Plan?

Developing an action plan is essential to project success. An action plan provides credibility to a project and increases efficiency and accountability. In addition, an action plan helps to prepare for potential obstacles.

Benefits of an action plan include the following:

- Provides clear direction
- Helps prioritize tasks
- Highlights what steps need to be taken and when they should be completed
- Tracks progress towards meeting the goal(s)

How to Write an Action Plan

1. *Determine what you want to achieve and define your goal*

Start by thinking about where you are and where you want to be, and write down your goal. Then, ensure that it is a SMART goal:

- Specific: well defined and narrowed for more effective planning
- Measurable: evidence to show progress or that the goal has been achieved
- Attainable: make sure you can reasonably accomplish your goal within your timeframe
- Relevant: your goal should align with your mission and desired long-term outcomes
- Timely: set a timeline and completion date

Use a SMART goal worksheet, like the following example, to assist your team in defining your goal.

What do you want to achieve?

We want people from Human Resources (HR) and Child Welfare (CW) to work together, break down silos, and get the right people at the table

We want HR and CW to use workforce metrics to make data-informed decisions to address workforce challenges

Specific *Well defined and narrowed for more effective planning*	Create a team with various stakeholders (e.g., HR director, HR analyst, CW director, CW program administrator, frontline supervisors and workers) to regularly examine CW workforce metrics, make data-driven workforce decisions, and use workforce data to assess the effectiveness of workforce interventions.
Measurable *Evidence to show progress or that the goal has been achieved*	A mixed group of stakeholders involved from HR and CW (aim for a maximum of 10 people total); schedule quarterly meetings (4 meetings per year); track number of workforce metrics reviewed, decisions made, and resulting impacts
Attainable *Make sure you can reasonably accomplish your goal within your timeframe*	Once key stakeholders are identified, the first meeting will be scheduled at least 6 weeks in advance to allow time on everyone's calendars. This will also allow time to pull initial workforce metrics to review or create a catalog of potential metrics to discuss with the new team during the first meeting. After this, meetings should occur at least quarterly, allowing sufficient time for follow-up on recommendations between meetings while ensuring a sustained focus. Ongoing meeting frequency should be guided by the needs of the agency.
Relevant *Your goal should align with your mission and desired long-term outcomes*	By creating a multidisciplinary team, the agency can make more informed decisions about the child welfare workforce (e.g., decisions about recruiting, hiring, training, promotion, staff development needs)
Time-bound *Set a timeline and completion date*	Identify and contact stakeholders to participate in the initial meeting within the next month. Host the first meeting within the next quarter. This group will convene regularly, and no end date is planned at this time.

Rewrite your goal using SMART principles:

Establish a multidisciplinary team (comprised of HR and CW leadership and frontline staff) to regularly examine CW workforce metrics to make data-driven workforce decisions.

2. *Determine the steps/tasks that are required to meet the goal:*

Start by clearly defining each task and ensuring they are manageable; break down larger, more complex tasks into smaller ones if necessary. It is important that the entire team be involved in this initial process, to ensure everyone is aware of their roles and responsibilities in achieving the goal(s). A table, such as the one used in the example below, can track tasks, people responsible for each task, and due dates. This will be the foundation of your action plan.

3. *Prioritize tasks and establish timeframes*

Prioritize each task and determine realistic timeframes. Ensure the person or team responsible for task completion knows their capacity before establishing timeframes. For example, in the table above, the HR and CW directors are assigned a number of tasks. However, if these individuals are taking vacation or have other pressing deadlines during these timeframes, then the due dates may need to be adjusted.

4. *Establish milestones*

Milestones are smaller goals that indicate project progress. Milestones motivate the team and provide them an opportunity to recognize their achievements. Milestones can be especially motivating for long-term projects, when the final due date is far away. When establishing milestones, it is helpful to start from the end goal and work backwards. Do not spread milestones too far apart—2 to 4 weeks is best. For example, with the tasks listed above, milestones could include "select members of the project team" or "determine which workforce metrics CW/HR can each provide to the team."

5. *Determine the desired outcome for action steps*

The overall goal is determined at the beginning of action planning, but there may be several desired outcomes to achieve in pursuit of the overall goal. These outcomes are another way of breaking down the goal into smaller, incremental steps. To establish desired outcomes, determine what changes the project would like to see and link these to the action steps. Sometimes several activities result in achieving one outcome, and sometimes one activity has several outcomes. An example of a desired outcome may be "Establish a multidisciplinary team to examine combined workforce metrics from CW and HR to address CW workforce issues."

6. *Identify what resources are needed*

Before beginning the project, ensure the team has the necessary resources to complete the tasks. Resources can be financial, human resources (e.g., staff, consultants, volunteers), technology, or other material goods. If the necessary resources are not available, develop a plan to acquire what is needed. Continuing with the example above, resources could include those required for examining workforce metrics, such as a list of HR and CW reports and data available, reporting software, time allocations for analysts, etc.

7. *Establish what evidence determines a step has been achieved*

As action steps are developed, consider the information sources and data collection methods needed to help the team determine when an action step has been successfully completed. Sources of information may include project staff, stakeholders, project documentation, project reports, data from trusted sources, interviews or focus groups, and/or observations. An example of this could be "CW and HR staff from various levels commit to participate in the workgroup."

8. Create a written action plan

Develop a written action plan that everyone understands and that can be shared among the team. The document should be accessible by all team members and should be editable so that any continued adjustments can be made. Ensure that the plan clearly conveys the essential components. An example of an action plan summarizing the elements discussed is below.

Goal: Establish a multidisciplinary team (comprised of HR and CW leadership and frontline staff) to regularly examine CW workforce metrics to make data-driven workforce decisions.

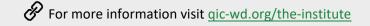| Action Step	Person/ Department Responsible	Start Date	Due Date	Milestones	Evidence of Achievement	Resources or Data Required	Desired Outcome
Identify key stakeholders to participate	CW and HR directors	8/27/20	9/4/20	Select members of the project team	CW and HR staff from various levels commit to participate in the workgroup	Names and contact information for HR and CW staff and supervisors	Establish a multidisciplinary team to examine workforce metrics
Contact stakeholders and their managers to assess interest and availability	CW and HR directors	9/7/20	9/11/20				
Determine first meeting date and agenda items (e.g., establishing a team charter, identifying additional stakeholders, setting regular meeting times, identifying initial priorities)	CW and HR directors and other team members	9/14/20	9/25/20	Determine which workforce metrics CW/HR can each provide to the team	Meeting invitation and agenda		
Pull any relevant reports or data to be reviewed by the team prior to the first meeting	HR and CW data leads	9/14/20	10/23/20		Developed reports or list of data	Lists of HR and CW reports and data available, reporting software, analyst time	

9. Monitor, evaluate, and update the plan

Finally, the team should evaluate the plan on a regular basis to determine how much progress has been made, whether tasks have been delayed, or whether there are barriers to meeting the desired outcomes. The plan should be updated/modified as needed.

Resources/Additional Reading

Creatively (2020). The easy guide to developing an effective action plan. Retrieved from https://creately.com/blog/diagrams/how-to-write-an-action-plan/

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