Living into Your Strategic Plan: Tools and Templates

Step 1: Translate

Initiative Action Plan Template

How to use this template

Why would you use this template? For each initiative, use this action plan template to describe the context for the initiative, assign staff roles, and estimate anticipated outcomes, milestones, resources required, and interdependencies with other departments/functions.

When would you use this template? After strategic priorities have been translated into initiatives, as you detail what each initiative will entail.

Initiative #: Name of Initiative Here

1. Related Strategic Priority

Select the organizational priority or priorities that this initiative will help to achieve

- SP #:
- SP #:
- SP #:

2. Initiative Context and Expected Results

Describe the project, why it was developed, expected results, and how its success will be assessed.

3. Team

Initiative lead: Name, Title, Department/Region

Team members:

- Name, Title, Department/Region
- Name, Title, Department/Region
- Name, Title, Department/Region
- Name, Title, Department/Region

Proposed start date: MM/DD/YY

Proposed end date: MM/DD/YY

4. Resources Required

Financial and other resource implications: Describe additional hires or other major costs associated with implementing initiative.

5. Initiative Work Plans and Interdependencies

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Outcomes</th>
<th>Lead</th>
<th>Due Date / Milestones</th>
<th>Interdependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>List by objectives for initiative in chronological order of estimated completion</td>
<td>List the expected outcomes for each objective</td>
<td>Designate the person who will own initiative</td>
<td>MM/YYYY</td>
<td>List requirements from departments/functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective</td>
</tr>
</tbody>
</table>