Appendix I
Action Planning Tool

1. Complete the following activities to ensure successful translation:
❏Secure a project leader.
❏Identify change champions.
❏Consider whether translation activities require different or additional members.
❏Schedule time to complete milestones.
❏Identify critical milestones and related tasks.
❏Identify observable pre or post measures.

2. Identify barriers to the success of the change, and then identify strengths that can be leveraged to overcome barriers.

Barriers	Resources or Strengths	Plan to Overcome Barriers by Leveraging Strengths as Appropriate

3. Consider whether or how this change will affect the following:

❏ Electronic health record   ❏ Workflow   ❏ Policies and/or procedures

4. Confirm support and/or availability of funds to cover expenses.
(Check all that apply)

❏Personnel costs   ❏ Education or further training

❏Supplies/equipment   ❏ Content or external experts

❏Technology   ❏ Dissemination costs (conference costs, travel)

❏Photocopying   ❏ Other: _____

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	5. Identify critical milestones and related tasks:			
	(Insert Milestone 1)	*(Insert Milestone 2)*	*(Insert Milestone 3)*	*(Insert Milestone 4)*
Tasks	*(Insert task)*			

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Directions for Use of the Action Planning Tool

Purpose of form

This form is used to guide you as you create an action plan.

Activities to ensure successful translation

These are all activities that must be completed as you plan the change. Consider pre- and post-observable measures that can be used to determine whether the change was successful. In addition, identifying critical milestones allows the team to see whether they are on track to accomplish the goals.

Identify strengths/resources and barriers to the success of the change

This analysis allows teams to identify barriers to implementation and potentially mitigate them using inherent strengths and resources. You may find specific challenges that will likely impact the ability to deliver on the action plan. Though these obstacles can get in the way, knowing about them up front is helpful so that you can engage support and create a plan to address them.

Consider whether or how the change will impact workflows and processes

Be mindful of the impact of the change downstream. For example, will changes need to be made to the electronic medical record to accommodate the change, or will this change impact the workflow of any other staff who have not been considered?

Confirm support and/or availability of funds to cover expenses

Use this as a guide to prompt thoughtfulness about financial obligations that may be a part of the rollout.

Identify critical milestones and related tasks

Consider all the categories of work (milestones) necessary to implement this change. What tasks must be accomplished first for each milestone in order to move forward? When must they be completed to stay on track? For example, if a milestone is to implement a protocol, list all tasks to accomplish it.