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Individual action plan development worksheet

This worksheet will guide you through the steps necessary to develop your individual action plan, including:

- an overall action plan goal
- key tasks and associated timelines
- measures of success.

Although you create and own your action plan, in many cases you will work with partners to complete your project. As you develop your plan, it may be helpful to think of yourself as the project manager. Among other tasks, project managers typically create a scope of work, identify funding requirements, determine staffing needs and collect project-related data and information.

The seven-week academy will include scheduled action plan check-ins, but it's likely that the weekly presentations will also help you shape your overall goal, as well the other aspects you will document. It is important to reflect on your idea weekly. This will allow you to document your plan elements more succinctly and succeed in implementing your plan.

Please keep in mind that DRCOG staff is a resource; as questions or issues come up, do not hesitate to ask for help. Be prepared to present your action plan in class on Nov. 8. You must email your completed individual action plan (this document) to Lisa Houde (lhoude@drcog.org) no later than Nov. 6, 2018.

NAME: Jim Eshelman

What overarching problem are you hoping to address? *(for example, housing affordability, income inequality, access to opportunity)*	Lack of 24/7 access to Guaranteed Ride Home service. Difficulty using the GRH outside of normal business hours because cab rides must be ordered by a human resources representative at the covered employee' s place of work, or it must be ordered by DRCOG staff. These people are usually not available outside of normal business hours.
In one paragraph, describe your plan to address this issue.	Redesign the service operating model so that covered employees can access the service easily at any time of day or night or day of the year.

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OVERALL ACTION PLAN GOAL	TASKS	TIMELINE
Employees covered by the GRH can access service any time of day or night.	*(List the major tasks that must be performed to implement your plan.)*	*List milestone dates or timing for completing the major tasks. (for example, a specific date, or in the third month)*
	- Solicit proposals and select a call center. - Negotiate and execute contract with call center. - Design and flowchart call center processes. - Design policies and procedures for call center. - Train call center staff.	- 6/01/17 – 10/03/17 - 10/03/17 – 10/31/17 - 10/01/17 - 10/31/17 - 10/01/17 – 10/31/17 - 11/01/17 – 12/31/17

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ACTION PLAN OBJECTIVES	MEASURE(S) OF SUCCESS
List the measurable objectives you will need to accomplish to reach the overall action plan goal. *(Objectives are results that you expect to achieve within a specific time frame. In general, objectives are more specific and easier to measure than goals.)*	*Describe each measure and your target for each measure.*
All calls are answered within 45 seconds.	Measure: percent of calls answered within five rings. Target: 98% of calls are answered by a live agent within 5 rings. Measure: percent of callers placed on hold and amount of time they are placed on hold. Target: 2% of calls that go to hold are answered within 45 seconds.
No caller must wait more than 20 minutes for a cab ride home.	Measure: number of elapsed minutes from time call is placed to time driver reports picking up customer. Target: all callers are picked up within 20 minutes of placing call.

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Individual action plan: Project implementation details

FUNDING *Estimate the financial cost to implement your plan. What costs will you incur, and how do you plan to obtain funding?*	**COST ESTIMATE:** $55,906 **DESCRIPTION:** One-time implementation costs are estimated at $20,906 in addition to $35,000 per year in call center charges.
EXPERTISE/GUIDANCE *What expertise are you missing to implement your plan? Do you need business or financial decision-making help? Do you need the help of a mentor? Have you identified potential external partners or supporters?*	**DESCRIPTION:** Staff has no experience operating or working with a call center. Will contact other programs that may have attempted a similar model
LABOR *Can you implement your action plan by yourself or do you need help? How much time will be required? If you need help, where and how will you find partners or volunteers?*	**TIME ESTIMATE:** 350 Hours **DESCRIPTION:** Includes administrative, research, and graphics hours needed contract with a call center and implement the new operating model.
INFORMATION *What information or data will you need that you don't currently have? Do you know where or how to obtain it? Is there a cost associated with obtaining it? Do you need help obtaining it and have you identified who that person is?*	**DESCRIPTION:** All necessary data is readily available from accounting and call center records

What will success look like?

TARGETS *How will you know that you have met the targets for each of your objectives?*	Compare actual performance to the targets.
DATA *How will you collect data for the measures you established above?*	All target data is available from call center records and cab company records. May also begin surveying users to measure satisfaction.