

# Action Plan to \_\_\_\_\_

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In the blank space above, **Write a SMART objective for your action plan.** Your objective should be specific, measurable, achievable, relevant, and time-bound. *For more detailed instructions, see flip side of this worksheet.*

*Action steps to accomplish the objective:*

Action Step	Timeline / Milestones	Responsibilities (Person or Group)	Resources Required	Evaluation Metrics

*Writing a dedicated action plan for each objective helps streamline organizational operations and provides direction for staff / volunteers.*

## Instructions for Completing the Action Plan Template

**1. Objective: Write a SMART objective for your action plan.** Your objective should be specific, measurable, achievable, relevant, and time-bound. **Don't do this: improve volunteer engagement.** **Do this: increase volunteer engagement by 20% in the next 6 months by hosting two events and expanding donor outreach.**

**2. Action Steps: List the specific actions that will help you achieve your objective.** Break the larger goal into smaller, manageable tasks. Try to think of everything that needs to happen to accomplish the objective.

*Ex. If your objective is to raise \$20,000, break it into action steps such as:*

- *Identify 50 new potential donors... Organize two fundraising events in Q1... Develop a targeted email campaign... Create a social media fundraising challenge... Implement a monthly giving program...*

**3. Timelines & Milestones: Define deadlines and key milestones for each action step.** This helps you track progress and stay on schedule.

- *Month 1: Develop email campaign strategy... Month 2: Launch social media challenge... Month 3: Implement monthly giving program... Month 6: Evaluate results and adjust strategies*

**4. Responsibilities: Assign each task to a specific individual or team member to ensure accountability.**

- *Marketing team: Email campaign and social media challenge*
- *Development team: Monthly giving program*
- *Executive Director: Overall oversight and progress monitoring*

**5. Resources Required: List the resources needed to complete each action step.** This could include financial resources, staff time, equipment, or materials. Example: *Budget allocation for social media advertising costs.*

**6. Evaluation Metrics: Identify how you will measure success for each action step.** Think ahead about how you'll measure success and progress, and how you will collect and monitor that data

- *Number of new donors*
- *Increase in average donation amount*
- *Social media engagement rates*
- *Email open and click-through rates*

**Visit the LEARN resource library at [reachpenn.com](http://reachpenn.com) to download a copy of this template**