Executive Summary & Action Plan Template

This Assessment Executive Summary & Action Plan is to provide stakeholders a brief description of the assessment project, who was involved, who participated, and how the data was collected.  It will also outline Significant Findings, propose Recommendations, and identify Action Strategies aimed to initiate change.  All assessment summaries will be available to department staff members as a department assessment archive will be created and used for future planning.

**Project Title:**

**Reporting Department Area:**

**Project Lead:**

**Topic:**

**Assessment Date(s):**

**Assessment Summary:**

In summary, or narrative form, discuss:

1. Provide general info outlining program/service being assessed.
2. What is the purpose of the assessment, why did you undertake this assessment/what did you hope to learn?
3. Who was involved in the assessment project, and/or program being assessed?
4. Who participated in the assessment (i.e. audience/sample/N & (n))?
5. How was the data collected (i.e. methodology)?

**Significant Findings:**

*After gathering, organizing, and breaking down the “raw data,” review your findings to:*

In summary, or narrative form discuss:

1. What did you learn?
2. What are the meaningful take-aways from the assessment?
3. What are the successes found in the data?
4. What are the areas for improvement?
5. What surprised you about the data that you did not anticipate?

*Note:* Utilize the raw data/#s/qualitative statements to support your findings and provide greater clarity for the reader)

**Proposed Recommendations:**

In summary, or narrative form discuss based on your findings:

1. What should be done now?
2. What should be investigated further?
3. What should be monitored?
4. What should stop being done?
5. Who should review this summary? Internal and External to the Department

**Action Plan:**

**VERSION 1**

**Action Plan Outline**

Goals, Objectives, & Implementation Plan:

* Goal 1: (Identify proposed SMART goal(s) to initiate change)
  + Objectives: (Supportive strategies to achieve goal)
  + Timeline: (Provide tentative timeline, or implementation plan for Objectives)
  + Tracking/Evaluation: (Describe how goal progression will be tracked and/or evaluated)
* Goal 2: (?)

**VERSION 2**

**Action Plan Outline**

Address the following:

* Proposed goals now that you have data
* Timeline for completion
* Responsible parties
* Communication plan: who should know what? When?
* Implementation strategy
* Metrics to measure progress and evaluation process

**VERSION 3**

**Action Plan Outline**

Fill in the following action plan:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Goal/Key take away | Objectives | Timeline | Evaluation Process | Collaborators | Quarterly Progress |
| #1: | * TBD * TBD |  |  |  |  |
| #2: |  |  |  |  |  |
| #3: |  |  |  |  |  |
| #4: |  |  |  |  |  |