

Assessment and Action Plan Checklist




Develop two to four goals that align with the unit’s mission.

Develop specific and measurable objectives for each goal, as well as associated strategies that detail how the objectives will be achieved.

Establish targets for each objective. Targets are metrics that you will use to determine whether the unit has met the objective.

Review your goals and objectives to determine a plan for assessment going forward. What will be assessed in the current fiscal year, the next, etc.

Periodically set aside a formal time to review Phase 1 components (goals, objectives, strategies, and targets) and update or revise as necessary.

Designate a person to lead the implementation of the assessment and action plan and submit the annual progress report.

Provide each unit staff member with access to an updated copy of the unit assessment and action plan.

Establish a data collection process so evidence/information can be easily collected for review.




Collect data/information/evidence for selected goal and objectives.

Build time into regular staff meetings to review and discuss the assessment results. Keep meeting minutes.

When reviewing the data, consider these questions:

- What are the *strengths* and *weaknesses* observed across the selected target(s) related to the objective being assessed?
- How can results be used to make improvements?

Discuss how unit processes or services may be improved and develop plans for how recommendations or actions will be implemented.




Document the impact of changes implemented previously.

Update the assessment and action plan document and submit the annual assessment progress report.

Sustain a well-designed and manageable assessment plan and process to inform decision-making.