



WorkLife Support Action Planning Worksheet

COMPASS Research Program
Oregon Healthy Workforce Center
Oregon Health & Science University
www.YourWorkpath.com/COMPASS

Action Planning Worksheet

Check off the next three steps as they are completed:

	1. Make sure everyone has written their issue and rating on the board
	2. Have the people with the highest ratings review the issues they listed
	3. Select one issue to discuss this week

Take notes as you go.

STEP 1: ISSUE SELECTION

Ask the person with the issue to briefly review his/her challenge/opportunity.

Group member with new issue: _____

Description:

Once the person with an issue for discussion is selected, ask the group to help the person brainstorm and take notes below while the scribe writes ideas on the board.

STEP 2: BRAINSTORM IDEAS AND SHARE EXPERIENCES

Ask the person with the issue to pick their three favorite action ideas from the brainstorm list. Have the person with the issue discuss pros and cons of each during this step. They should write these on the worksheet while the scribe puts stars next to these ideas on the board.

STEP 3: PERSON WITH ISSUE PICKS FAVORITE ACTION IDEAS

Favorite Action Ideas
1.
2.
3.

Ask the person with the issue to get specific about their action plan, timeline, and what kind of follow-up they want. Fill in the table below with their answers.

STEP 4: MAKE AN ACTION PLAN

What is the action?
When will it be done?
Is any follow-up wanted before our next meeting?