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Action Plan Self-Assessment

Source: Centre for Organisational Excellence Research

Permission to present the self-assessment on the BPIR website has been provided by the Centre for Organisational Excellence Research (COER), www.coer.org.nz

How the self-assessment can help BPIR members...

This self-assessment will help you in assessing the effectiveness of your organisation's action planning processes. The assessment considers outcomes, personnel, resource allocation, timelines, accountabilities, monitoring and evaluation in association with action planning.

The Self-Assessment

For each statement below tick the response that is relevant to your organisation.

ACTION PLANNING CHECKLIST		Always	Mostly	Some- times	Seldom	Never
Score		5	4	3	2	1
• <i>The Product or Outcome</i>						
1	We have a clear understanding of our goals, i.e. what needs to be done					
2	The expected benefits from completing the project have been clearly defined.					
• <i>The people involved</i>						
3	We identify the roles and persons required to implement each action step					
4	The ownership of each action step is negotiated and communicated with participants					
5	Responsibility is assigned for assuring that tasks are completed as planned.					
• <i>The timeline</i>						
6	We assign dates for the commencement of each action step.					
7	We assign completion dates for action steps					
8	We document the necessary sequence needed for each action step					
• <i>Resources: people, financial, equipment and information</i>						
9	All available resources are documented.					
10	We allocate the necessary resources needed for the completion of action steps.					
11	We identify resources that are not readily available but needed to complete action steps.					
12	We specify how each resource will be allocated.					
13	We understand and communicate how the availability/allocation of resources affects the timeline for each step.					
• <i>Accountability: Monitoring / evaluation</i>						
14	Personnel are appointed to review and monitor the overall implementation.					
15	The frequency of monitoring and review is specified.					
16	The standards for monitoring and review are specified.					
17	Personnel are appointed to assist with troubleshooting when unexpected challenges arise during implementation.					
18	We specify how feedback will be incorporated into the process					
19	Personnel are appointed to revise processes as needed.					
20	A person has been appointed to evaluate the effectiveness of the implementation of the action steps in relation to the objectives and overall goal(s)					
Subtotals						
Total (maximum = 100)						

Scoring Key

- A score of 75 - 100 indicates that your organisation is highly advanced in terms of the use of action planning methodologies
- A score of 50 - 75 indicates that your organisation is reasonably effective in the use of action planning methodologies
- A score of 0 - 50 indicates that your organisation might benefit from training for employees in the use of action planning methodologies