GREATER MINNESOTA HOUSING FUND

Minnesota Housing Partnership

ACTION PLANNING

A Tool for Moving your Goals Forward

September 19, 2018

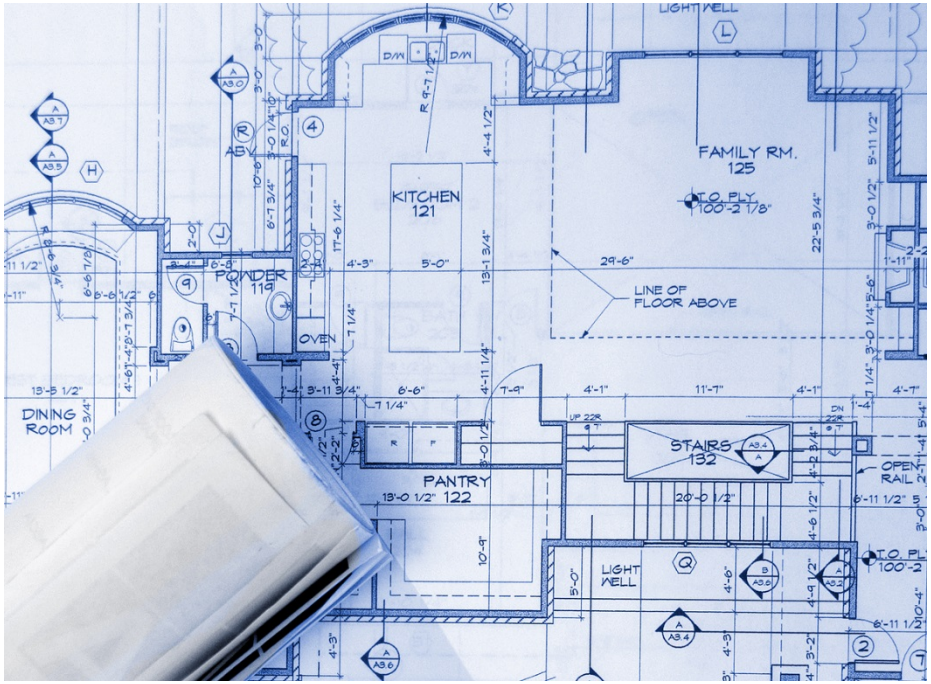


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WHAT IS AN ACTION PLAN?

A blueprint for achieving a specific goal.

- Provides the:
  - **Who?**
  - **What?**
  - **When?**
  - **Where?**
  - **How?**



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HOW DOES IT HELP?

The TEAM:

- Create feasible action steps
- Assign tasks
- Develop a timeline
- Promote task accountability



The COMMUNITY:

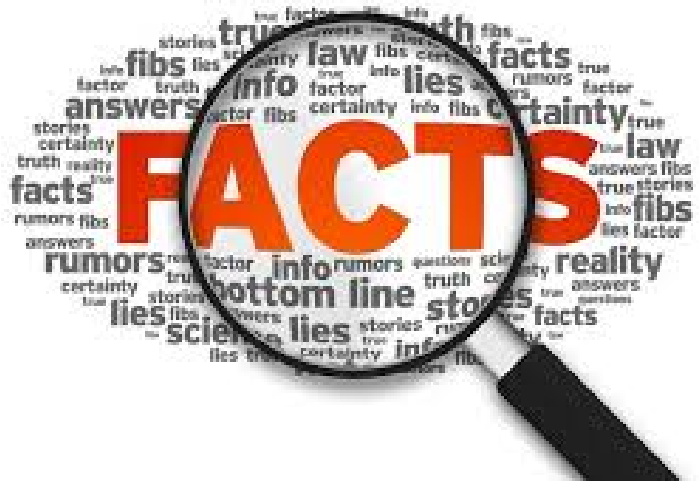
- Promotes project accountability
- Documents and evaluates activities
- Assures community participation
- Builds consensus

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BEFORE YOU BEGIN

1) **Outline the problem or issue you would like to address**
    1) What are you trying to change?

2) **Gather data about your issue**
    1) Government records/websites
    2) Local/National organizations
    3) Schools and Libraries
    4) Community Opinion



3) **Determine the stakeholders**
    1) Who is most affected by the problem?
    2) Who is in the best position to make a change?

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Lakes Region Housing Coalition

- Committed consortium of regional partners
- Completed Housing Needs Analysis
- Stable but aging population
- Vacant school building; or
- Other building sites?
- What next?



STEP ONE:

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Create a vision statement!

- Vision statement: An aspirational description of what your team wants to achieve or accomplish in the mid-term or long-term future. It should serve as ***a clear guide for choosing current and future*** courses of action.
- Should be:
  - Specific
  - Simple
  - Inspirational



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Action Planning Template

2018 – 2019 Housing Institute

Team Name: Lakes Region Housing Coalition
Project Lead: Mary Featherstone
Team members: Peter Piper, Goldie Locklear, Jack Sprat, Jackie Horner,

Start Date: September 19, 2018
Progress update:
Completion date:

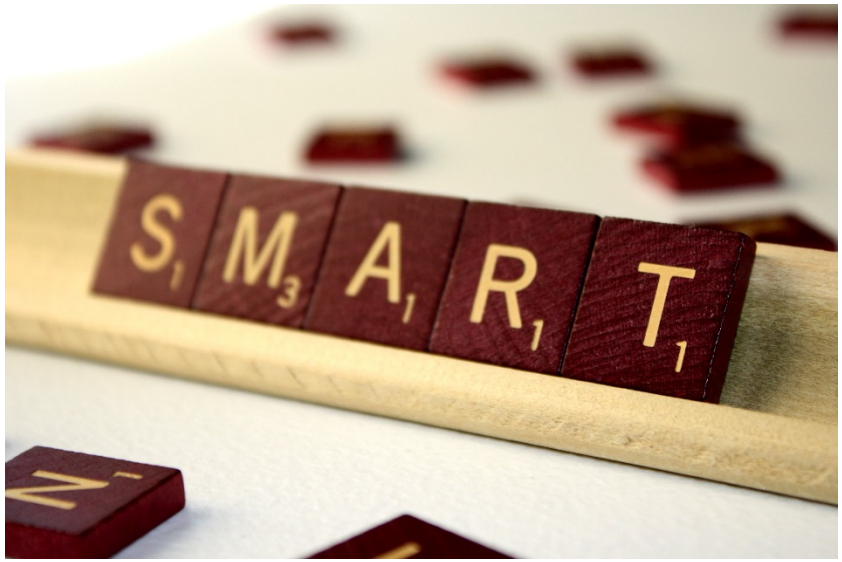
Vision Statement: *LRHC will preserve and increase community housing options through collaborations at the local level*
Goal:

Action Steps *(What are the specific steps we need to take?)*	**Resources Needed** (What do we need to complete this step?)	**Responsible Person** (Who will take action to complete this step?)	**Potential Challenges** (Are there barriers that will need to be addressed?)	**Timing** (Start date End date)	**Intended Outcome** *(What will success look like?)*

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STEP TWO:

- **Develop your Plan!**
  - How will you achieve your vision?
  - What are your goals?
- *Should be S-M-A-R-T*
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**elevant
  - **T**ime based



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Start Date: September 19, 2018
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Vision Statement: *LRHC will preserve and increase community housing options through collaborations at the local level*
Goal: *#1) Define the suitability of the vacant Bluewater High School property for 24 units of low-moderate income rental housing by 2019*

Action Steps *(What are the specific steps we need to take?)*	**Resources Needed** (What do we need to complete this step?)	**Responsible Person** (Who will take action to complete this step?)	**Potential Challenges** (Are there barriers that will need to be addressed?)	**Timing** (Start date End date)	**Intended Outcome** *(What will success look like?)*

STEP THREE:

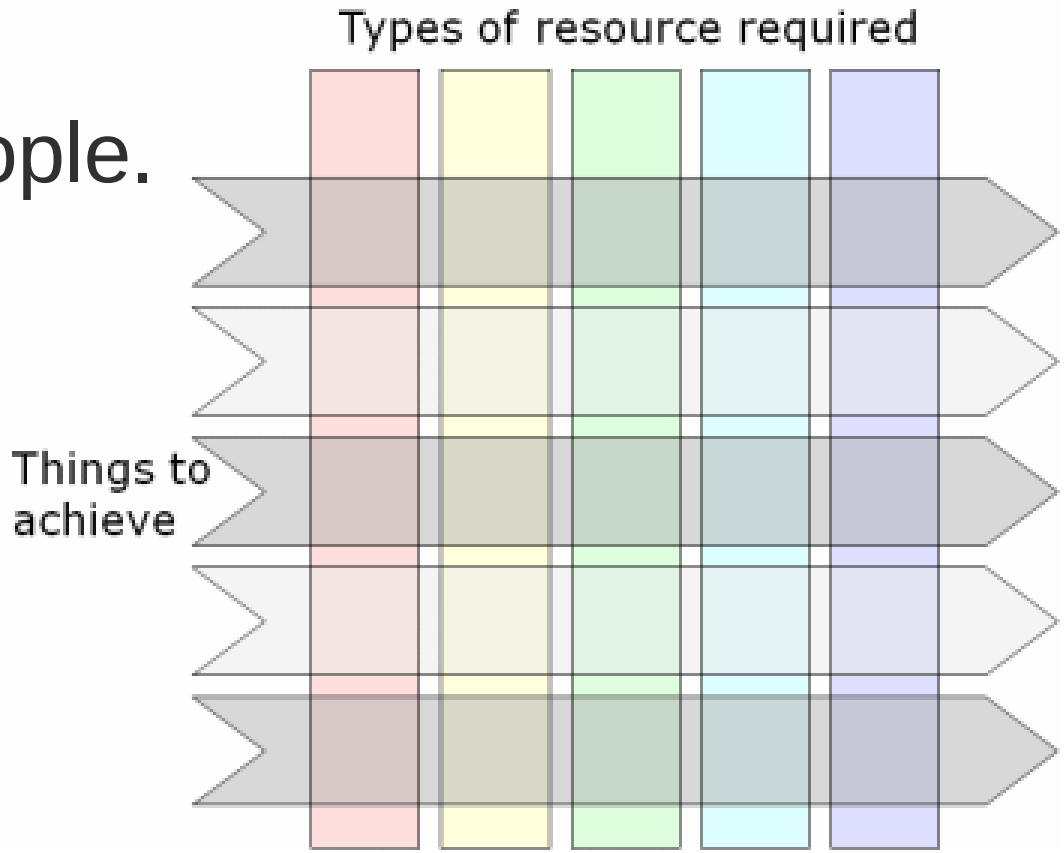
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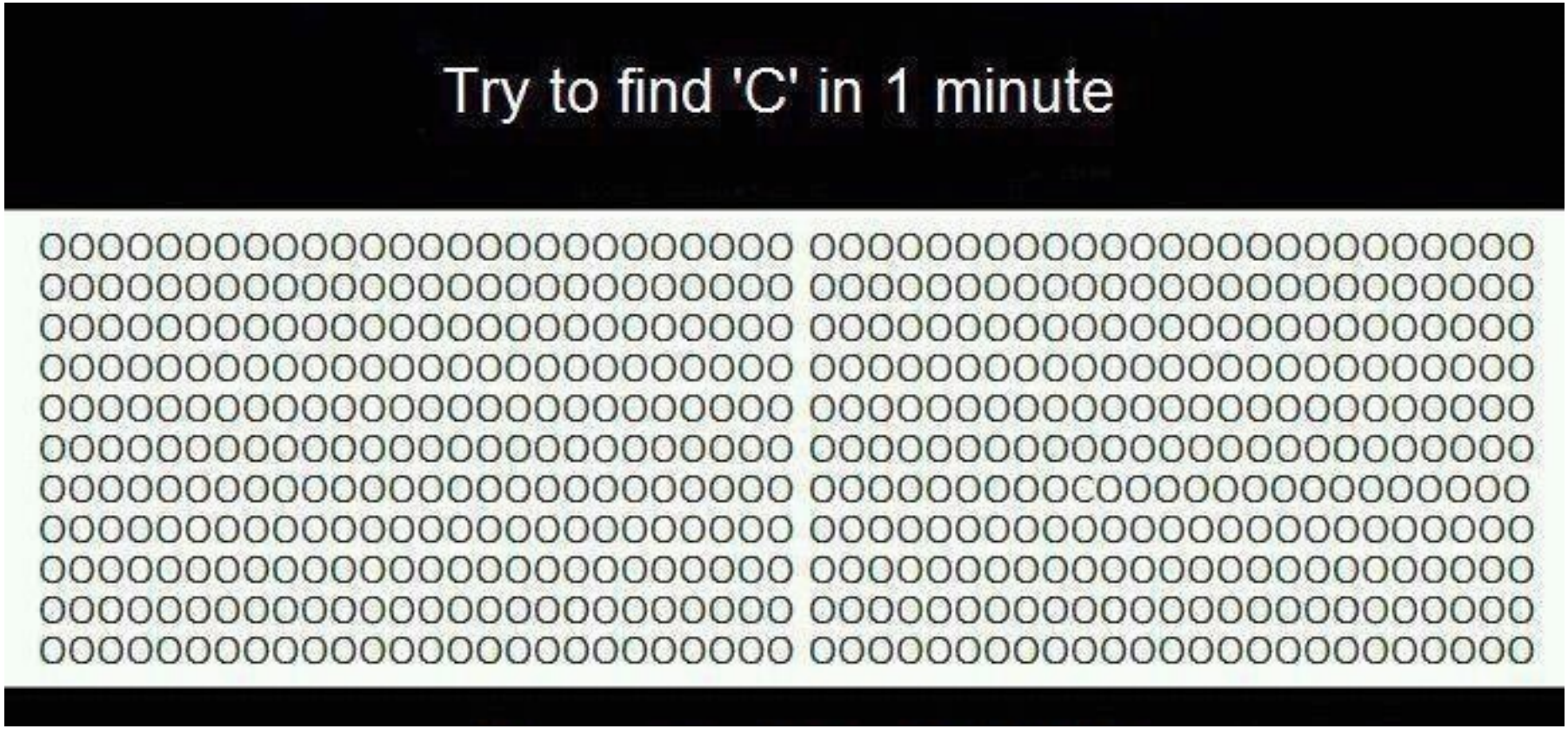
- **Develop Action Steps to achieve your goals!**
  - Brainstorm
    - What are the steps needed? Consider multiple approaches.
    - Who needs to be involved?
    - What resources will you need to complete your objectives? How will you get them? ***SCHEME***
    - When will you start? When will you finish?
    - How will you know you've completed the step? Results or outcome statement.

S-C-H-E-M-E-S

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- **S**pace.
- **C**ash.
- **H**elpers/People.
- **E**quipment.
- **M**aterials.
- **E**xpertise.
- **S**ystems.




Try to find 'C' in 1 minute

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Backward Planning

- Looks much the same as a traditional forward plan.
- Process is different.
- Forces you to think from a different perspective



Goal

Can we adapt the school for housing?

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Outcome

Get Engineer Report

List of Engineers who specialize in adaptive reuse projects

Create Scope of Work

Publish RFP

Action steps needed



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Get a list of Engineers Create Scope of Work Publish RFP				Start: 07-17-18 End: 08-31-18	Get Engineer Report

Activity: Brainstorming the Steps

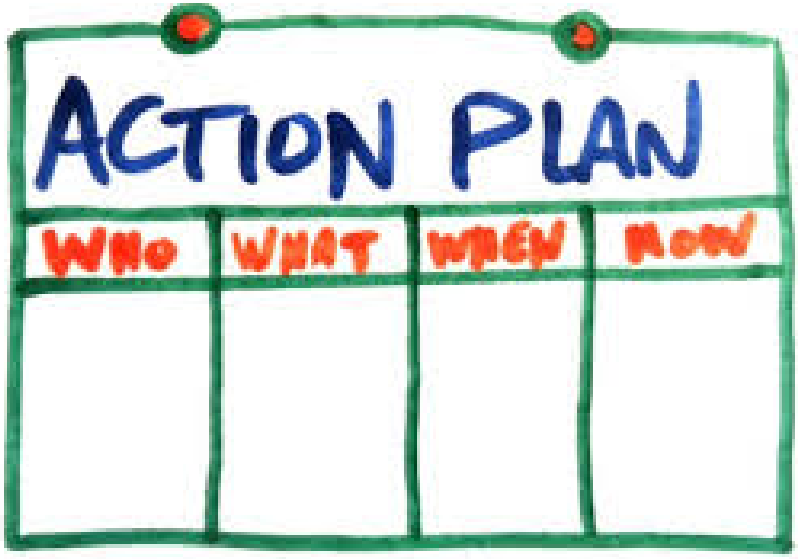
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1. Using the sticky-notes: each person should write down things that must happen in order to achieve the goal for LRHC (5-10 minutes)
2. Categorize all of the sticky-notes by Action Steps on the wall (10 minutes)
3. As a team, put the Action Steps in sequential order Check to see if there are any critical steps missing – add if necessary (15 minutes)
4. List the steps sequentially in your template; add a start and end date and what you want to see as a result of the Action Step. (10 minutes)
5. Report back to the group at large.

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WRITING THE PLAN

- What's left to define?
- Each action step should also include:
  - Who will do the work
  - Required Resources
  - Potential Obstacles



FINALLY…

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Is your Action Plan:

- Comprehensive and clear?
- Feasible and timely?
- Flexible and prioritized?
- Does each team member know what is expected of them? Do they have a plan on how to move forward?
- Do you have the resources needed to complete? If not, how will you get them?

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EXECUTING THE PLAN

- **Keep track of your progress!**
  - Gather feedback – monitor performance
  - Keep refining/adding/removing steps
  - Track costs and personnel on each step
- **Communicate your progress!**
  - Stay in contact with stakeholders
  - Publicize meetings
  - Keep everyone in the know



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Sustainability

- How can we collaborate with stakeholders?
- Who sets the priorities?
- Who keeps us on Track
- When do we check-in?
- How do we communicate? (internally and externally)

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ACTION PLANNING SUMMARY:

- Action plans:
  - Refine your group's purpose and objectives
  - Break down problems into actionable steps
  - Help clarify the actors and stakeholders
  - Hold team members accountable for individual tasks
  - Provide transparency and inspiration



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Useful Tip

- Project Management Comparison Chart
  - Free or low cost project management software to help your team plan, communicate and coordinate activities



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