

Developing a Research Action Plan for Your Organization

Developing an action plan for your organization may help the process of incorporating and embedding research or community-based participatory research (CBPR) into your organization. This document includes a step by step guide on how to develop and maintain and action plan, a template action plan, and some sample goals/objectives.

Related Directory Resources: Assessing Your Organizational Research Environment, Considering/Developing Your Organization's Research Purpose

Adapted from "Action Planning for Global Education," by World View, an International Program for Educators at the University of North Carolina at Chapel Hill and Community-Campus Partnerships for Health.

Introduction

The Action Plan is a guide to planning for change, and it describes:

- A clear picture of where you are currently, where you are going, and where you want to be in 3-5 years
- How you are going to get there
- Who and what are involved
- The timeframe
- Means to monitor activities and assess success

Elements of the Action Plan

- Goal(s)
- Objectives
- Actions Needed
- Responsibilities
- Resources Needed
- Timeframe
- Monitoring and Evaluation Methods

Remember: This plan is focused on your organization's **research** involvement or capacity, not your organization's plans or capacity in general.

Steps for Creating Action Plans

Consider who from your organization should be involved in creating this research action plan. Think about from your organization that will be key in planning and implementing research activities (this may include staff, leadership, board members, clients/community members, partners).

1. **Determine/discuss your organization's baseline status of research/CBPR involvement/capacity through self-assessment** (*see Directory Resource on this*). Before you begin your action plan, your organization may need a better picture of what is happening right now. What are you already doing related to research? Evaluating your organization's status quo or conducting the SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis may be helpful. Completing this look at the status quo may be your organization's first action step.

2. **Ask basic questions.** After the baseline status is assessed, ask questions: Related to research, what will we work toward? Where do we want to be by the end of a given project? Where do we want to be in 3-5 years? Why? Answering these questions is at the heart of the Action Plan, leading directly to the formulation of the Objectives.

3. **Identify the Objectives.** The Action Plan template can include research/capacity building goals. You may have several objectives for each goal.

Goal: Expresses a clear and general sense of direction, a purpose, an aim. The three goals outlined focus on the most important outcome to be achieved, or benefit that will be derived from implementing an Action Plan.

Objectives: Are more specific than goals. They express what each individual/org want to accomplish in terms of each larger goal. In many ways, objectives express the strategy that has been decided on and the desired accomplishments.

See below for example goals/objectives

4. Implementation and Evaluation

Activities: Action steps are the ways and means (initiatives, changes, events, etc.) by which objectives are achieved and evaluated.

- **Action Steps: What needs to be done?** What action steps/tasks will promote or support (goal)? What is needed to “Better integrate understanding of CBPR throughout your organization?”
- **Responsibilities and Timeline: By whom and by when?** Who (staff/partners/student interns) or what units will be responsible for planning and carrying out the activity? Who will participate in this activity? Are there other organizations that you will collaborate with on this activity? What timeframe is being allocated for each activity? When will this be completed (month/day)?
- **Resources: What is available and what is needed?** What resources (people, skills, \$) are necessary to implement or evaluate the activity? What are possible sources of those resources?
- **Considerations:** What are possible facilitating factors or possible barriers/challenges?
- **Evidence of Success: What evidence indicates progress?** How will you know you are making progress? What are your benchmarks? Put in measurable indicators, such as rates of participation or attendance, that demonstrate evidence of progress. For example: # of trainings attended/developed/implemented; # of meetings held/people/orgs attending; # of proposals/abstracts submitted; # of contacts made.
- **Evaluation Process: How and when will evidence be gathered?** How will the indicators be measured or the evidence gathered, and how often should this be done? For example, event satisfaction survey; interview with org leadership. How will you plan to keep track of your lessons learned, the best practices, plans for replication and further collaboration?

5. **Action Plans as Works in Progress:** The Action Plan is a work in progress. It requires monitoring, discussion of progress, changes and revisions where indicated, and consistent updating. These action plans may also be helpful to prepare for progress and final reports of any given grant

6. **Realism and Vision:** Be realistic, creative, and idealistic, all at once. Realism contributes to the Plan’s credibility, feasibility and success. Without creativity and idealism, the vision may be too conservative to attract sources, resources and widespread support and enthusiasm.

ACTION PLAN TEMPLATE:

Organization:	Date Created: Last Modified:
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Goal: #1:	Where are you currently?	Where in one year?	Where in 3-5 years?
Objective(s):			

Action Steps <i>What Will Be Done?</i>	Responsibilities <i>Who Will Do It?</i> <i>Who will participate?</i>	Timeline <i>By When?</i> <i>(Day/Month)</i>	Resources: A. Available/B. Needed <i>Financial, human, political & other</i>		Considerations <i>Facilitators/ barriers</i>	Evaluation Process <i>How to determine goal has been reached?</i>	Evidence of Success <i>Measures?</i>
Step 1:			A.	B.			
Step 2:			A.	B.			
Step 3:			A.	B.			

Goal: #2:	Where are you currently?	Where in one year?	Where in 3-5 years?
Objective(s):			

Action Steps <i>What Will Be Done?</i>	Responsibilities <i>Who Will Do It?</i> <i>Who will participate?</i>	Timeline <i>By When?</i> <i>(Day/Month)</i>	Resources: A. Available/B. Needed <i>Financial, human, political & other</i>		Considerations <i>Facilitators/ barriers</i>	Evaluation Process <i>How to determine goal has been reached?</i>	Evidence of Success <i>Measures?</i>
Step 1:			A.	B.			

Step 2:			A.	B.			
Step 3:			A.	B.			

Goal # 3 Objective(s):	Where are you currently?	Where in one year?	Where in 3-5 years?

Action Steps <i>What Will Be Done?</i>	Responsibilities <i>Who Will Do It?</i> <i>Who will participate?</i>	Timeline <i>By When?</i> <i>(Day/Month)</i>	Resources: A. Available/B. Needed <i>Financial, human, political & other</i>		Considerations <i>Facilitators/ barriers</i>	Evaluation Process <i>How to determine goal has been reached?</i>	Evidence of Success <i>Measures?</i>
Step 1:			A.	B.			
Step 2:			A.	B.			
Step 3:			A.	B.			

Example Goals, Objectives, Action Steps. These are ideas but be creative in thinking about what best fits for your organization is and where you are starting.

Goals	Objectives	Action Steps
Goal 1: Increase our organization's understanding of how we are currently using and participating in research.	Assess our organization's research environment	<ul style="list-style-type: none"> ▪ Complete the organizational assessment ▪ Assess what evaluation/data we conduct/collect and how we use it for decision-making ▪ Connect with partners/stakeholders/clients/community members (internally/externally) ▪ Consider our organization's research purpose
	Develop a process for tracking current research involvement and deciding whether to participate in future research	<ul style="list-style-type: none"> ▪ Identify a staff lead ▪ Establish a research committee
Goal 2 Increase our organization's understanding of research/CBPR	Develop research training/education opportunities for internal staff and/or partner organizations.	<ul style="list-style-type: none"> ▪ Include update or info about our or other local research/CBPR plans/activities on organization's meeting agendas ▪ Plan and deliver trainings/workshops/brown bag seminars/research case studies. Share and discuss news articles about current research studies related to your organization's mission or neighborhood. ▪ Publicize/encourage attendance for org staff to ARCC or other CBPR related events
	Develop research agenda for our org	<ul style="list-style-type: none"> ▪ Identify research questions related to our programs, mission. What research do we need to help us do what we do better or to expand what we do? What research is needed to help our community address health issues? ▪ Seek input from staff, org partners, research partners ▪ Hold community forums to get input from constituents about research priorities ▪ Conduct or review existing community assets/needs assessments
	Establishing organizational research policies, protocols	<ul style="list-style-type: none"> ▪ Develop guidelines/criteria for involvement in future research activities ▪ Develop standard Memorandum of Understanding for work with research partners ▪ Develop/receive board support for CBPR policies/action plan
	Build org infrastructure to engage in research	<ul style="list-style-type: none"> ▪ Allocate staff time to CBPR related issues, redefine position responsibilities ▪ Seek student intern/community volunteer to support research activities ▪ Train staff in research related skills (survey methods, IRB certification) ▪ Build NIH grant submission capacity (e.g. obtain ERA commons ID, federally negotiated indirect rate) ▪ Seek funding to support organization's involvement in/conduct of research
	Engage in CBPR partnership/project implementation	<ul style="list-style-type: none"> ▪ Develop/implement plan to build/maintain relationships with research partners ▪ Conduct research ▪ Disseminate findings to org staff, community constituents ▪ Present work to others- conference presentation, article publication