# Action Plan Review & Evaluation Template

Your action plan will need to be updated periodically (approximately every 3-5 years, depending on the time frame initially decided on). A lot of change can happen both within and outside of your unit and the UM as a whole, and it is important to ensure that the goals and objectives in your action plan continue to support the needs of your unit. The intent of this process is not to get bogged down in rewriting a document, but simply to identify what goals need changing and identify additional or different actions that are needed at this time to further the overall goals of the action plan.

The following template\* is meant to guide a 3-4-hour long discussion to refresh your action plan. You can facilitate this discussion within your unit, or request that this process be facilitated (email [mental.health@umanitoba.ca](mailto:mental.health@umanitoba.ca) for more information).

**QUESTIONS FOR DISCUSSION:**

1. What have we accomplished since we implemented the action plan? (30 minutes)
   1. Are there goals or actions that have been completed? That are still in progress? That have not yet been started?
2. In what ways has our current reality changed since we put together our action plan? (20 minutes)

**SETTING ASIDE THE STRATEGIC PLAN FOR NOW:**

1. What are we expected to produce— what expectations do our leadership or stakeholders have? (15 minutes)
   1. Was anything missed from the initial goals and expectations, or does anything need to be re-prioritized out of what was originally expected?
2. In addition to the initial plan, what do we see that we can definitely do if we choose to take it on? (15 minutes)
3. What do we think might be possible but can’t guarantee? (15 minutes)
4. On our best days, what do we dream about being able to do? (10 minutes)
5. In our current reality and projects, what is noise to us and what are we passionate about? (30 minutes)

**FOCUSING FORWARD:**

1. Reflecting on our conversation so far, what seems to make sense for us to pursue? Are there unmet or new needs or goals to prioritize? (30 minutes)
2. What are our next steps? (30 minutes)

Frame your next steps using this SMART goals template