Growth Action Plan Worksheet

How to Use the Growth Action Plan Worksheet

Using input from multiple stakeholders, choose 1-2 strategies from within the ten key planning
areas to work on during the next year. In the index below, mark the box to the left of the strategy
you have chosen to work on. Space is provided to add your own strategy.

Note: It is recommended that at least one strategy be selected for each key planning area. However, the needs, experiences and priorities for self-management education (SME) providers can differ considerably.

- On the next pages (45-47), mark the box to the left of the strategy you have selected, and then write-in the first major activity. Please designate a strategy number (i.e. 7.2) for each action step/timeline and include an estimated date for completion.
- Indicate your level of confidence in achieving the activity by the date selected. Consistent with self-management goal-setting, activities should have a high level of confidence (score of 7 or greater) to be included in the Growth Action Plan.

□ 10.2 Program Curriculum Originators

□ 10.4 _

☐ 10.3 Professional Association Memberships

It is recommended that this worksheet be updated twice per year.

#1: Revenue #4: Competition #7: Organizational Support Service Fee Schedule ■ 4.1 Local Competitor Identification Statement of Organization Alignment Discounts and Deals New Entrants **□** 7.2 **4.2** Champions Services Available Outside the Market **□** 7.3 **1.3** Competitive Grant Application **4.3** Clarify Roles and Organization Grant Partner or Subcontractor ■ 4.4 Competitor Objectives and Strategies 1.4 Structure **Local Foundations** Competitor Resources and Capabilities **□** 7.4 1.5 **4.5** Patient Care Team Integration **7.5** Service Contracts **4.6** 1.6 Competitor Forecast Profile Volunteer Management **7.6 4.7** □ 1.7 Charitable Contributions Collaboration with Competitors Succession Planning Participant Advisory Council **1.8 4.8** Reduce Competition **7.7 4.9 □** 7.8 Staff Training and Education **#2: Marketing 7.9** Key Messages **2**.1 **#5: Service Operations** Collateral Materials ■ 5.1 Master Trainers **#8: Community Support** 2.3 Presentations and Forums ■ 5.2 Leader Identification ■ 8.1 Advisory Council ■ 8.2 Community Health Coalition Program ■ 2.4 Earned Media ■ 5.3 Leader Training ☐ 2.5 Social Media ■ 8.3 Local, Influential Leaders □ 5.4 Leader Retention ■ 2.6 Open House □ 5.5 Menu of Service Options ■ 8.4 New Partnerships **2.7** Word-of-Mouth Campaign **5.6** Consistent Course Offerings ■ 8.5 Expert Presentations Branding **□** 5.7 Quality Assurance and Fidelity and Training Programs **□** 5.8 □ 8.6 Public Service Announcements 2.10 Point of Sale Promotions **#6: Evaluation #9: Advocacy 2.11** ■ 6.1 Case for Data Collection 9.1 Join Policy Development Organization **#3: Referral Network** ■ 6.2 Data Collection Methods Community Needs Assessment Identify Prospective Partner 9.3 Develop Talk Points **□** 3.1 □ 6.3 Program Evaluation Formalize Partnership Agreements **□** 3.2 ☐ 6.4 Communicating Outcomes **9.4** Educate Elected Officials ■ 3.3 Referral Intake Process **□** 6.5 ■ 3.4 Offer Partnership Tiers **#10: Resource Linkages** ■ 3.5 Public Recognition ■ 10.1 Active with MAOP ■ 3.6 Assess Needs of Partners

□ 3.7

3.9

■ 3.8 Leadership

Provide Feedback

Active Strategies	Confidence Level	Active Strategies	Confidence Level
#1: Revenue 1.1 Service Fee Schedule 1.2 Discounts and Deals 1.3 Competitive Grant Application 1.4 Grant Partner or Subcontractor Next Action Steps(s) and Timeline:		 1.5 Local Foundations 1.6 Service Contracts 1.7 Charitable Contributions 1.8 	
#2: Marketing 2.1 Key Messages 2.2 Collateral Materials 2.3 Presentations and Forums 2.4 Earned Media 2.5 Social Media 2.6 Open House Next Action Steps(s) and Timeline:		 2.7 Word-of-Mouth Campaign 2.8 Branding 2.9 Public Service Announcements 2.10 Point of Sale Promotions 2.11 	
 #3: Referral Network 3.1 Identify Prospective Partners 3.2 Formalize Partnership Agreements 3.3 Referral Intake Process 3.4 Offer Partnership Tiers Next Action Steps(s) and Timeline: 		 3.5 Public Recognition 3.6 Assess Needs of Partners 3.7 Provide Feedback 3.8 Leadership 3.9 	

Active Strategies	Confidence Level	Active Strategies	Confidence Level
#4: Competition 4.1 Local Competitor Identification 4.2 New Entrants 4.3 Services Available Outside the Market 4.4 Competitor Objectives and Strategies Next Action Steps(s) and Timeline:		 4.5 Competitor Resources and Capabilities 4.6 Competitor Forecast Profile 4.7 Collaboration with Competit 4.8 Reduce Competition 4.9 	
#5: Service Operations 5.1 Master Trainers 5.2 Leader Identification 5.3 Leader Training 5.4 Leader Retention Next Action Steps(s) and Timeline:		□ 5.5 Menu of Service Options □ 5.6 Consistent Course Offerings □ 5.7 Quality Assurance and Fidel □ 5.8	·
#6: Evaluation do 6.1 Case for Data Collection do 6.2 Data Collection Methods do 6.3 Program Evaluation Next Action Steps(s) and Timeline:		□ 6.4 Communicating Outcomes □ 6.5	

Active Strategies	Confidence Level		Active Strategies	Confidence Level
 #7: Organizational Support 7.1 Statement of Organization Alignment 7.2 Champions 7.3 Clarify Roles and Organization Structure 7.4 Patient Care Team Integration Next Action Steps(s) and Timeline: 		□ 7.6 □ 7.7	Volunteer Management Succession Planning Participant Advisory Council Staff Training and Education	
#8: Community Support ■ 8.1 Advisory Council ■ 8.2 Community Health Coalition Program ■ 8.3 Local, Influential Leaders Next Action Steps(s) and Timeline:		□ 8.5	New Partnerships Expert Presentations and Training Programs	
#9: Advocacy □ 9.1 Join Policy Development Organization □ 9.2 Community Needs Assessment Next Action Steps(s) and Timeline:		9.4	Develop Talk Points Educate Elected Officials ———	
#10: Resource Linkages 10.1 Active with MAOP 10.2 Program Curriculum Originators Next Action Steps(s) and Timeline:			Professional Association Memberships	