

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

#1: Revenue

- 1.1 Service Fee Schedule
- 1.2 Discounts and Deals
- 1.3 Competitive Grant Application
- 1.4 Grant Partner or Subcontractor
- 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
- 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 Partner
- 3.2 Formalize Partnership Agreements
- 3.3 Referral Intake Process
- 3.4 Offer Partnership Tiers
- 3.5 Public Recognition
- 3.6 Assess Needs of Partners
- 3.7 Provide Feedback
- 3.8 Leadership
- 3.9 _____

#4: Competition

- 4.1 Local Competitor Identification
- 4.2 New Entrants
- 4.3 Services Available Outside the Market
- 4.4 Competitor Objectives and Strategies
- 4.5 Competitor Resources and Capabilities
- 4.6 Competitor Forecast Profile
- 4.7 Collaboration with Competitors
- 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
- 5.5 Menu of Service Options
- 5.6 Consistent Course Offerings
- 5.7 Quality Assurance and Fidelity
- 5.8 _____

#6: Evaluation

- 6.1 Case for Data Collection
- 6.2 Data Collection Methods
- 6.3 Program Evaluation
- 6.4 Communicating Outcomes
- 6.5 _____

#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
- 7.5 Volunteer Management
- 7.6 Succession Planning
- 7.7 Participant Advisory Council
- 7.8 Staff Training and Education
- 7.9 _____

#8: Community Support

- 8.1 Advisory Council
- 8.2 Community Health Coalition Program
- 8.3 Local, Influential Leaders
- 8.4 New Partnerships
- 8.5 Expert Presentations and Training Programs
- 8.6 _____

#9: Advocacy

- 9.1 Join Policy Development Organization
- 9.2 Community Needs Assessment
- 9.3 Develop Talk Points
- 9.4 Educate Elected Officials
- 9.5 _____

#10: Resource Linkages

- 10.1 Active with MAOP
- 10.2 Program Curriculum Originators
- 10.3 Professional Association Memberships
- 10.4 _____

#1: Revenue

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> 1.1 Service Fee Schedule <input type="checkbox"/> 1.2 Discounts and Deals <input type="checkbox"/> 1.3 Competitive Grant Application <input type="checkbox"/> 1.4 Grant Partner or Subcontractor | <ul style="list-style-type: none"> <input type="checkbox"/> 1.5 Local Foundations <input type="checkbox"/> 1.6 Service Contracts <input type="checkbox"/> 1.7 Charitable Contributions <input type="checkbox"/> 1.8 _____ |
|--|---|

Next Action Steps(s) and Timeline:

#2: Marketing

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> 2.1 Key Messages <input type="checkbox"/> 2.2 Collateral Materials <input type="checkbox"/> 2.3 Presentations and Forums <input type="checkbox"/> 2.4 Earned Media <input type="checkbox"/> 2.5 Social Media <input type="checkbox"/> 2.6 Open House | <ul style="list-style-type: none"> <input type="checkbox"/> 2.7 Word-of-Mouth Campaign <input type="checkbox"/> 2.8 Branding <input type="checkbox"/> 2.9 Public Service Announcements <input type="checkbox"/> 2.10 Point of Sale Promotions <input type="checkbox"/> 2.11 _____ |
|--|--|

Next Action Steps(s) and Timeline:

#3: Referral Network

- | | |
|---|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> 3.1 Identify Prospective Partners <input type="checkbox"/> 3.2 Formalize Partnership Agreements <input type="checkbox"/> 3.3 Referral Intake Process <input type="checkbox"/> 3.4 Offer Partnership Tiers | <ul style="list-style-type: none"> <input type="checkbox"/> 3.5 Public Recognition <input type="checkbox"/> 3.6 Assess Needs of Partners <input type="checkbox"/> 3.7 Provide Feedback <input type="checkbox"/> 3.8 Leadership <input type="checkbox"/> 3.9 _____ |
|---|--|

Next Action Steps(s) and Timeline:

#4: Competition

- 4.1 Local Competitor Identification
- 4.2 New Entrants
- 4.3 Services Available Outside the Market
- 4.4 Competitor Objectives and Strategies
- 4.5 Competitor Resources and Capabilities
- 4.6 Competitor Forecast Profile
- 4.7 Collaboration with Competitors
- 4.8 Reduce Competition
- 4.9 _____

Next Action Steps(s) and Timeline:**#5: Service Operations**

- 5.1 Master Trainers
- 5.2 Leader Identification
- 5.3 Leader Training
- 5.4 Leader Retention
- 5.5 Menu of Service Options
- 5.6 Consistent Course Offerings
- 5.7 Quality Assurance and Fidelity
- 5.8 _____

Next Action Steps(s) and Timeline:**#6: Evaluation**

- 6.1 Case for Data Collection
- 6.2 Data Collection Methods
- 6.3 Program Evaluation
- 6.4 Communicating Outcomes
- 6.5 _____

Next Action Steps(s) and Timeline:

#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

- 7.5 Volunteer Management
- 7.6 Succession Planning
- 7.7 Participant Advisory Council
- 7.8 Staff Training and Education
- 7.9 _____

Next Action Steps(s) and Timeline:**#8: Community Support**

- 8.1 Advisory Council
- 8.2 Community Health Coalition Program
- 8.3 Local, Influential Leaders

- 8.4 New Partnerships
- 8.5 Expert Presentations and Training Programs
- 8.6 _____

Next Action Steps(s) and Timeline:**#9: Advocacy**

- 9.1 Join Policy Development Organization
- 9.2 Community Needs Assessment

- 9.3 Develop Talk Points
- 9.4 Educate Elected Officials
- 9.5 _____

Next Action Steps(s) and Timeline:**#10: Resource Linkages**

- 10.1 Active with MAOP
- 10.2 Program Curriculum Originators

- 10.3 Professional Association Memberships
- 10.4 _____

Next Action Steps(s) and Timeline: