

Action Plan Worksheet

This material was prepared by Stratis Health under contract with The Minnesota Department of Health (MDH). Use of this tool is not mandated by MDH, nor does its completion ensure regulatory compliance.

This worksheet helps you organize, prioritize, and track work across multiple areas of your operations. By identifying goals, breaking them into actionable steps, assigning responsibility, and monitoring progress, providers can address issues proactively, support continuous improvement, and maintain organized, sustainable operations over time.

Action plans are most effective when focused on a single, clearly defined goal such as licensure readiness, survey preparation, policy updates, or corrective order compliance. Using one action plan per goal promotes clarity, accountability, and accurate tracking of progress. Completed action plans may also be retained as documentation of planning decisions, implementation efforts, and follow-up activities.

How to use this action plan

1. **Identify your goal:** Write down the goal you want to reach. *Example: "Get all documents ready for licensure."*
2. **List activities/tasks:** Break your goal into clear, simple steps. *Example: "Review and update the emergency plan."*
3. **Identify resources needed:** List what you need to complete tasks. *Examples: state licensure guidelines, policy templates, legal or financial advice, or staff time.*
4. **Assign responsibility:** Choose the person who will be in charge of each task. This could be the owner, manager, registered nurse (RN) supervisor, or a consultant.

5. **Set a deadline:** Pick a date when the task should be done. Set deadlines that are realistic.
6. **Track status:** Update the status as you work. Use labels such as Not Started, In Progress, On Hold, Overdue, or Complete.
7. **Review and update regularly:** Look at this action plan during team meetings or check-ins. Make changes as needed to stay on track.

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Goal:

Reason for the goal:

Date started:

Target completion date:

Goal Steps	Resources Needed	Responsible	Deadline	Status/Notes

