vital

Action plan template

✓	Target date	#	Action	Dep.	Who	Notes

Insert additional rows as needed (go to last cell and hit your tab key or right click in the table and select Insert>Insert Rows below).
Sort by ✓ and then by ‘Target date’ to keep the most urgent actions (including ones which have no target date) at the top of the table.

How to use the template

Column	How to use it
✓	Put a tick in this column when an action is completed. Put a cross is the action has been abandoned (i.e. is never going to be completed)
Target date	Put the date by which this action should be completed. Use a consistent format (e.g. DD/MM/YY)
#	This is a unique action number. The first action you add will be 1, the second 2 and so forth. (This is NOT the same as the order in which actions need to be done – it is the order in which they are added to the plan)
Action	This is a BRIEF label that summarises the action
Dep.	Dep. Is short for dependencies. It shows the Action numbers (#) of other actions which must be completed before this one can be done. Be careful not to get too spend too much time putting in dependencies – only worry about the really critical ones!
Who	This is the person who is responsible for making sure this action is completed. Use initials. If several people are contributing to the completion of an action then you can list them all, but make sure one of them is identified (by being put in bold) as being ultimately responsible for making sure that the action is completed on time.
Notes	Put dated notes with comments that explain the action more fully and any progress that has been made. The most recent notes should be put at the top of the cell. e.g. 30-10-11 Reminded X about the consent form – she said she would return it tomorrow. 28-10-11 Explained the research to X and give her the consent form. She agreed verbally, so now just waiting for the written agreement. 26-10-11 Need to get informed consent from X before we can move forward