




Functional Units Assessment and Action Plan Checklist

Phase	Check Box	Tasks
 Specify & Plan	<input type="checkbox"/>	Develop two to four goals that align with the unit's mission.
	<input type="checkbox"/>	Develop specific and measurable objectives for each goal, as well as associated strategies that detail how the objectives will be achieved.
	<input type="checkbox"/>	Establish targets for each objective. Targets are metrics that you will use to determine whether the unit has met the objective.
	<input type="checkbox"/>	Review your goals and objectives to determine a plan for assessment going forward. What will be assessed in the current fiscal year, the next, etc.
	<input type="checkbox"/>	Periodically set aside a formal time to review Phase 1 components (goals, objectives, strategies, and targets) and update or revise as necessary.
 Collect & Analyze	<input type="checkbox"/>	Designate a person to lead the implementation of the assessment and action plan and submit the annual progress report.
	<input type="checkbox"/>	Provide each unit staff member with access to an updated copy of the unit assessment and action plan.
	<input type="checkbox"/>	Establish a data collection process so evidence/information can be easily collected for review.
	<input type="checkbox"/>	Collect data/information/evidence for selected goal and objectives.
	<input type="checkbox"/>	Build time into regular staff meetings to review and discuss the assessment results. Keep meeting minutes.
	<input type="checkbox"/>	When reviewing the data, consider these questions: <ul style="list-style-type: none"> • What are the <i>strengths</i> and <i>weaknesses</i> observed across the selected target(s) related to the objective being assessed? • How can results be used to make improvements?
 Action & Follow-up	<input type="checkbox"/>	Discuss how unit processes or services may be improved and develop plans for how recommendations or actions will be implemented.
	<input type="checkbox"/>	Document the impact of changes implemented previously.
	<input type="checkbox"/>	Update the assessment and action plan document and submit the annual assessment progress report.
	<input type="checkbox"/>	Sustain a well-designed and manageable assessment plan and process to inform decision-making.