

ToP Action Planning Process Checklist

Date _____
Observer _____

Event _____
CTF Candidate _____

Context

- Did facilitator introduce the planning activity?
- Did facilitator review the background and any previously made decisions?
- Did facilitator briefly outline the time-frame for this and the eight critical parts of the Action Planning Process?

Victory

- Did facilitator ask the group to imagine the day after completion using sensory words such as “see”, “hear”, “feel”, etc.?
- Did facilitator get the participants excited?

Current Reality

- Did facilitator effectively guide participants to list the strengths and weaknesses of the current situation?
- Did facilitator have participants talk through the potential benefits and dangers that could result from succeeding with the action plan?

Commitment

- Did facilitator help participants develop a clear, compelling, and concise statement or list of components that everyone is committed to?
- Was this list posted on a flip chart?

Key Actions

- Did facilitator ask individuals to brainstorm actions that would accomplish the commitment (staring their key actions), break into pairs or small groups, read their individual lists to each other, and make cards on key actions they agree on from the individual lists?
- Did facilitator ask participants to send up their cards (clearest, different, symbols)
- Did facilitator ask participants to cluster the actions by those that could be done by the same subgroup or task force?
- Did facilitator ask them to form self-selected subgroups to finalize the actions?

Calendar

- Did facilitator ask each subgroup to plan its activities and place its cards on a large calendar, including the launch and victory?
- Did facilitator ask each subgroup to report its plan to the whole group?

Coordination

- Did facilitator ask the subgroups to adjust their calendar to reflect the coordination required among the subgroups?
- Did the whole group decide on the details of coordinating leadership, budget, and follow through mechanisms?

Resolve

- Did facilitator engage the group in a celebrative focused conversation?
- Was a catchy title, campaign slogan, or visual image created for the plan?
- Were next steps decided?
- Did the day conclude on a high note?

THINGS TO WATCH FOR: *(Rank facilitator 1-5 -- 1 needs much improvement, 5 is excellent)*

1. Clear explanation of the process _____
2. Inspiring "Victory" session _____
3. Kept session moving along _____
4. Kept people engage _____
5. Quickly elicited needed background information _____
6. Clarified abbreviations on the cards _____
7. Coded cards on wall for documenter _____
8. Got participants self-selected into teams quickly _____
9. Added budget column to calendar (if needed) _____

COMMON TRAPS TO BE AVOIDED: *(check if these were present)*

- Confusing introduction
- Taking too long in any one step
- Unreadable flip charts
- Group unable to clarify commitment
- Group not excited about their project (or plan)
- Didn't finish
- Got cards that said "form a committee to..."
- Didn't clearly capture names on teams (for documentation)