

ACTION PLAN

Download the [Excel workbook](#) to get started.

The Action Plan helps you schedule and assign the tasks needed to reach your SMART goals. Begin by listing each goal in the top section of the spreadsheet. Each goal is assigned a unique number in column A (G1, G2, G3, etc.) and the cell color indicates what category the goal relates to (Partnerships, Physical Space or Programs).

The area underneath provides space to define each of the tasks needed to reach your goals, set deadlines, and assign the work to members of your team. The template provides five rows for each goal, but you can easily insert more rows as needed. You can then sort the spreadsheet to organize tasks chronologically by due date, assignment, or goal number to help manage your progress.

Pictured below is an example of an Action Plan sorted by due date.

Action Plan Example

Color Key: Partnerships Goals (Green), Physical Space Goals (Blue), Program Goals (Purple)

Cells are shaded to indicate what type of goal they relate to: Partnerships, Physical Space, Programs. Tasks can be sorted chronologically, by assignment, by goals, etc.

Goal Number	Goal Description					
G1	Recruit at least 3 sponsors to contribute in-kind materials or donations for developing a space by Dec 2019.					
G2	Recruit at least 3 community partners to lead instruction for singular learning opportunities by March 2019.					
G3	Recruit at least 3 community partners to collaboratively develop workshops by August 31, 2019.					
G4	Formally present and request Makerspace plans to Friends Board, including the need for their storage area, by October 2018.					
G5	Prototype a maker cart and name to be used in Hangout by January 2019.					
G6	Obtain a formal quote for the construction of the new Makerspace by Feb 2019.					
G7	Synthesize prototyping data to present to Programming and Outreach staff in December 2018.					
G8	Develop and facilitate at least 2 prototype programs a month, 1 being for staff, by March 2019.					
G9	Host the soft opening for physical maker space during National Library Week, April 2019.					
GOAL	Task	Due Date	Assigned to:	Approved by:	Completed	Notes
G1	Request program proposal at October Friends Board meeting	9/11/18	Dani	Kathy Wright	X	
G1	Customize in-kind/donation sponsorship letter for Makerspace project.	10/1/18	Dani	Abbie	X	
G1	Create complete needs request to present to Friends.	10/1/18	Dani & Martin	Abbie	X	This will be included in the Physical Space Goal 1 tasks.
G4	Develop Programming Proposal using P/O template, including Partnerships Goal 1.	10/9/18	Dani	Abbie	X	
G7	Review Needs Assessment results with staff	10/25/18	Martin V	Dani PG	X	
G7	Include presentation on P/O evaluations meeting agenda	11/16/18	Dani PG	Abigail S	X	
G4	Create floorplan for converting the existing Arts/Graphics room to first iteration.	11/30/18	Martin	Dani	X	
G7	Review prototype reports and identify common themes, conclusions, or areas of concern	11/30/18	Martin V	Dani PG	X	
G8	Find consistent method of obtaining feedback from each prototype	11/30/18	Dani PG	Abigail S	X	
G2	Schedule a meeting with Yolanda Bernal at First Five Riverside.	12/4/18	Dani	Abbie	X	
G6	Work with facilities to schedule quote	12/7/18	Dani & Abbie	Kathy B.	X	
G7	Combine general themes with specific insights gained through prototyping into a single report	12/11/18	Martin V	Dani PG	X	
G8	Include P/O staff input in new prototype designs	12/11/18	Martin V	Dani PG	X	
G5	Gather supplies and cart for partitioning of "Making Moves" Cart.	12/14/18	Martin & Abril	Dani	X	Potentially purchase a new cart.
G5	Design the appearance of the "Making Moves" Cart.	12/14/18	Martin & Abril	Dani	x	
G9	Finalize design for existing space in Arts + Graphics room	1/31/19	Martin V	Abigail S	x	
G9	Collaborate with Friends of the Library to relocate their storage area	1/31/19	Dani PG	Abigail S	x	
G2	Schedule a meeting with Dominick Verrette at The Leela Project.	2/19/19	Dani	Abigail S	x	
G8	Develop flyers and marketing material for each prototype	3/29/19	Kristina	Dani PG	x	
G8	Design prototype activities as standalone events at our library	3/29/19	Martin & Kristina	Dani PG	x	
G8	Reserve the correct spaces for each standalone prototype activity on Activenet	3/29/19	Dani & Kristina	Michele L	x	
G3	Schedule a meeting with Neha Arya at FutureLink.	4/1/19	Dani	Dani	x	Evaluation of Fall/Winter sessions & summer proposal.
G9	Purchase light refreshments to be served at the opening event	4/12/19	Dani PG	Katherine B	x	
G9	Create method of inventory management and supply	5/31/19	Martin & Kristina	Dani PG	x	
G9	Remove current shelving and install more makerspace-friendly storage	5/31/19	Dani	Brandon V.	x	
G8	Work with volunteer coordinator to procure consistent volunteers to assist with summer	5/31/19	Martin & Kristina	Madelyne P	x	
G9	Develop policies and procedures for arriving at, using, and leaving the makerspace	5/31/19	K&M&D	Abigail S	x	
G2	Develop a marketing strategy to reach CNUSD STEAM teachers.	8/2/19	Dani	Abbie	x	
G2	Develop a marketing strategy to reach Corona STEM Academy teachers.	8/2/19	Dani	Abbie	x	