Define Program Goals:

Creating an Action Plan

Ready for Level 2?

	YES (✓)	NO (X)
You have set specific, measurable, realistic goals for your safety and health program	☐	**Visit Set SMART Goals (1ML_2a)**
You have communicated your commitment to achieving your goals to everyone in the organization	☐	**Visit Commit to Achieve Program Goals (1ML_2b)**

To-Do

☐ **Create an action plan for achieving your goals.**

☐ **Communicate your goals and plan throughout the organization.**

Develop an action plan

In Plan for Continuous Improvement (2ML_2a), you identified issues that can be fixed right away. You also set goals for others that call for more time and resources. Now you need an action plan for reaching those goals and for communicating them throughout the organization.

Your action plan can include the following:

- **Goal statement:** The specific, measurable goal you've set to address the hazards, risks, concerns, and improvement opportunities.

- **Project owner:** The person responsible for overseeing progress in achieving the goal.

- **Resources needed:** Staffing, training, budget allocation, and other resources needed for implementation. Refer to work you did in Defining Resources Needed (1ML_3a) to estimate resources needed to meet program goals. Be sure to consult with workers to find out if they have what they need to work safely and to participate fully in the program. See the case study on page 5 for an example of how one company estimated resources needed to meet a specific program goal.

- **Monitoring:** The process and metrics you will use to measure progress.

- **Task breakdown:** Specific tasks for step-by-step implementation, including people responsible for each task and target dates for completion.
- **Project approver:** Manager who approves the project, if needed.

Below is an example plan. It covers one goal for a small warehouse employing 250 people. Following the example is a template you can adapt and fill in for each of your own goals.

Example action plan

Action Plan: Goal 1

Project owner: _____Mary Watkins_____   **Date assigned:** ___1/15/2024_____

High-priority hazard/risk or concern/improvement opportunity:

Several musculoskeletal (back, shoulder, and wrist) injuries resulting from repetitive lifting of heavy loads while in awkward positions.

Goal statement:

Conduct ergonomics assessments and make necessary improvements on 25 percent of the jobs in each department this year.

Resources needed (see case study below):

Resources, including training and education, for four people to conduct ergonomic assessments. Future budget allocations for ergonomic job aids to be determined. Local manager support for implementing and supporting corrective actions.

Monitoring to measure progress:

Departments must submit ergonomics progress reports each month. These must list the jobs assessed, findings, and the status of improvements. Other measures of the improvements may include injury and illness information and worker surveys.

Implementation tasks:

#	Task	Responsible party	Target completion date	Actual completion date
1	Hold a series of meetings with department heads, the safety team, and maintenance to review the goal, develop action plan steps, and estimate support resources needed.	Department heads, safety, and maintenance		
2	Review the plan with leaders to ensure there is buy-in and necessary support is available.	Jessica Hernandez		

#	Task	Responsible party	Target completion date	Actual completion date
3	Communicate the goal and the plan to supervisors and workers.	Mary Watkins		
4	Develop (or find) an ergonomics assessment tool/form and job improvement tracking form.	Ron Cohen		
5	Train chosen staff on ergonomics job assessment, the evaluation form, and potential job changes to reduce risks.	Bob Andres		
6	Make a list of trained ergonomics job assessors available to departments. Conduct assessments.	Mary Watkins		
7	Begin improvements. Secure additional resources if needed.	Department heads		
8	Monitor progress by requiring each department to send a monthly ergonomics improvement status report to a safety manager for analysis.	Susie Cook		
9	Present a summary of status reports during the monthly safety meeting with leadership and communicate progress to all workers.	Mary Watkins		

Project approver: _____

Action plan template

Action Plan: Goal #_____

Project owner: _____**Date assigned:** _____

High-priority hazard/risk or concern/improvement opportunity:

Goal statement:

Resources needed:

Monitoring to measure progress:

Implementation tasks:

#	Task	Responsible party	Target completion date	Actual completion date
1				
2				
3				
4				
5				
6				
7				
8				

Project approver: _____

Case Study: Resource Needs for Ergonomic Assessments and Improvements

The small warehouse company described above and in Plan for Continuous Improvement (2ML_2a) set a new goal to address risks of musculoskeletal injuries. That goal was to "Conduct ergonomic assessments and make needed improvements on 25 percent of the jobs in each department this year."

The safety and health planning team met and estimated resources needed for the following:

- Training for employees chosen to be ergonomic assessors. (The team knew that free training might be available, for example from the company's workers compensation insurer or OSHA's On-Site Consultation Program.)
- Staff time for workers and supervisors to give input for assessments and selection of controls.
- Estimated costs for controls (modifications to equipment, procedures, and methods).
- Time and resources for training on the use of new controls.
- Resources to maintain the controls put in place for the first jobs assessed.

On the team's recommendation, these estimates were incorporated into budget plans for the coming year. The estimates were updated once the assessment was completed, and controls were chosen. The ergonomic assessments not only led to lower risks but also resulted in better quality and productivity. The team noted that over time, resources would be needed for ergonomic assessments and improvements for 100 percent of the jobs.